North East Victoria
Cycling Optimisation Masterplan

Prepared by Urban Enterprise for Tourism North East and Regional Development Victoria June 2018
## Contents

<table>
<thead>
<tr>
<th>Section</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>01 Introduction</td>
<td>1</td>
</tr>
<tr>
<td>02 North East Visitor and Cycling Markets</td>
<td>2</td>
</tr>
<tr>
<td>03 Cycling Market Segments</td>
<td>7</td>
</tr>
<tr>
<td>04 Cycling Supply</td>
<td>9</td>
</tr>
<tr>
<td>05 Strategic Considerations</td>
<td>15</td>
</tr>
<tr>
<td>06 Masterplan Framework</td>
<td>20</td>
</tr>
<tr>
<td>07 Theme One: New and Enhanced Cycle Product and Experiences</td>
<td>22</td>
</tr>
<tr>
<td>08 Theme Two: Cycle Friendly Region</td>
<td>26</td>
</tr>
<tr>
<td>09 Theme Three: Complementary Product and Experiences</td>
<td>29</td>
</tr>
<tr>
<td>10 Theme Four: Driving Demand in Cycle Tourism</td>
<td>32</td>
</tr>
<tr>
<td>11 Summary of Impacts: Tier One High Priority Projects</td>
<td>34</td>
</tr>
</tbody>
</table>
North East Victoria has long been recognised as having the strongest cycle tourism credentials in Victoria, and is primed to become Australia’s premier cycling destination. To realise this vision, Tourism North East in conjunction with Regional Development Victoria has developed the North East Victoria Cycling Optimisation (NEVCO) Masterplan that looks to optimise cycling opportunities throughout the region, creating world class cycling experiences that drive significant growth to the local visitor economy.

The Masterplan identifies a range of priority projects that offer the greatest cycle tourism growth opportunities for the region, noting the infrastructure, private sector activation and marketing required across the local rail trail, mountain bike and road cycling offering to achieve a leadership position in this space.

A significant amount of public funding and resources have been dedicated to the delivery of cycling infrastructure within North East Victoria over the past 15 years, which has strengthened the region as a year-round destination.

The NEVCO Masterplan strategically reviews the way to optimise the existing investments in cycling through the development of improved experience, private sector activation and plans for future investments that will see North East Victoria develop its appeal to both national and international cycle visitors.

The Masterplan has been developed by tourism, planning and economic consultant Urban Enterprise in consultation with a broad range of industry, community and Government stakeholders. This document summarises the key findings of that body of work, providing a focus for cycle tourism efforts across the region.
North East Visitor Economy

North East Victoria attracts over 3 million visitors annually, with almost half of this visitation comprising domestic overnight visitors. This significant visitor market ensures that tourism is a core industry for the region, valued at $711 million in total output and with an employment impact of 3,638 jobs.

Overview of North East Victoria’s Visitor Economy

<table>
<thead>
<tr>
<th>LGA</th>
<th>Tourism Output (Million)</th>
<th>Jobs</th>
<th>Visitation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Alpine*</td>
<td>$214</td>
<td>992</td>
<td>930,000</td>
</tr>
<tr>
<td>Mansfield**</td>
<td>$133</td>
<td>662</td>
<td>682,000</td>
</tr>
<tr>
<td>Wangaratta</td>
<td>$127</td>
<td>691</td>
<td>465,000</td>
</tr>
<tr>
<td>Wodonga</td>
<td>$90</td>
<td>534</td>
<td>310,000</td>
</tr>
<tr>
<td>Indigo</td>
<td>$87</td>
<td>404</td>
<td>372,000</td>
</tr>
<tr>
<td>Benalla</td>
<td>$37</td>
<td>225</td>
<td>217,000</td>
</tr>
<tr>
<td>Towong</td>
<td>$23</td>
<td>130</td>
<td>124,000</td>
</tr>
<tr>
<td><strong>North East Victoria</strong></td>
<td><strong>$711</strong></td>
<td><strong>3,638</strong></td>
<td><strong>3,100,000</strong></td>
</tr>
</tbody>
</table>

Source: Remplan. Tourism Research Australia, 2017

*Includes Falls Creek and Mt Hotham Alpine Resorts
**Includes Mt Buller Alpine Resort
2.1.1 Projected Visitation

Importantly, visitation to the region is growing with a total of 4.4 million visitors forecast to visit North East Victoria by 2025. This level of projected growth highlights the need for continued investment in tourism infrastructure, product and experiences in the region to support increased demand.
3 million annual visitors

$711 million in economic output

3,638 jobs

1.5 million additional projected visitors by 2025
2.2 North East Victoria Cycling Market

On average 6% of domestic overnight visitors to North East Victoria participate in cycling, which is double the average for regional Victoria. This equates to around 100,000 cycling visitors to North East Victoria per annum – more than any other regional destination in the State.

The growth rate of visitors who undertake cycling has outpaced growth of the total visitor market in both North East Victoria and in Regional Victoria, across all markets. The domestic overnight cycling market to North East Victoria grew by 72% between the comparison periods (5.5% per annum), outpacing total visitor growth to North East Victoria (12% / 1.2% per annum), regional Victoria (12% / 1.1% per annum) and growth in the regional Victorian cycling market (52% / 4.3% per annum).

Cycle visitation growth has been fueled by substantial investments made in cycle infrastructure developed at a high standard across the three cycling disciplines. This, combined with excellent food, wine and beer product, a strong supply of accommodation and an iconic Victorian High Country backdrop, has created a regional destination with great appeal across national and international cycling markets.
2.2.1 Projected Cycle Visitation

Projections show that cycle visitation is forecast to grow to 255,000 by 2025 using a midpoint growth scenario, which represents an increase of 155% from present day cycling visitation. With further investment in cycle tracks, trails and marketing, cycle visitation may be even greater than this. The Masterplan provides a framework to support this growth and ensure that quality infrastructure and complementary product is developed to provide the visitor with an exceptional tourism experience when in-region.

### Direct Expenditure from Cycling Visitors

<table>
<thead>
<tr>
<th></th>
<th>5 Year Average (2011-2015)</th>
<th>Average Spend Per Visitor Night / Visitor</th>
<th>Direct Expenditure</th>
</tr>
</thead>
<tbody>
<tr>
<td>Domestic Overnight Cycling Visitor Nights</td>
<td>336,351</td>
<td>$141</td>
<td>$47,425,466</td>
</tr>
<tr>
<td>International Cycling Visitor Nights</td>
<td>6,907*</td>
<td>$141</td>
<td>$973,913</td>
</tr>
<tr>
<td>Daytrip Cycling Visitors</td>
<td>17,938</td>
<td>$81</td>
<td>$1,452,978</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td></td>
<td></td>
<td><strong>$49,852,358</strong></td>
</tr>
</tbody>
</table>

### Cycling Visitation - Summary of Growth Scenarios

![Graph showing historical, proportionate capture, and average growth scenarios for cycling visitation from 2015 to 2025.](image)
03 Cycling Market Segments

Extensive market research was undertaken as part of the NEVCO Masterplan to understand the size of domestic cycling markets. Within the key states of Victoria, New South Wales, Queensland and South Australia, the following have ridden a bike in the past 12 months:

- 3.3 million people have ridden on a bike path;
- 2.2 million people have undertaken road cycling;
- 1.2 million have undertaken mountain biking; and
- 750,000 have ridden on a rail trail.

There is a large amount of cross over between cycling types, including:

- 46% of mountain bikers have also undertaken road cycling;
- 25% of road cyclists have also ridden a mountain bike; and
- 49% of rail trail riders have ridden a road bike.

The crossover of cycling types is critical to understanding the strength of North East Victoria. It is one of the very few cycling destinations in Australia that is able to provide a strength in all three cycling typologies. This means that the North East has a greater potential for attracting cycling enthusiasts than any other region. It also means that many cyclists to North East Victoria will be looking to undertake multiple types of cycling, with some arriving with a mountain bike and road bike when visiting.

### People Who Have Ridden a Bike in the Past Twelve Months

<table>
<thead>
<tr>
<th>Type Of Cycling</th>
<th>Proportion Of Population</th>
<th>Total Number Of Cyclists In Key Domestic Markets (Vic, NSW, Qld, SA)</th>
<th>Direct Expenditure</th>
</tr>
</thead>
<tbody>
<tr>
<td>Road Cycling</td>
<td>11.4%</td>
<td>2.2 Million</td>
<td>$47,425,466</td>
</tr>
<tr>
<td>Mountain Biking</td>
<td>6.2%</td>
<td>1.2 Million</td>
<td>$973,913</td>
</tr>
<tr>
<td>Rail Trail Cycling</td>
<td>3.9%</td>
<td>750,000</td>
<td>$1,452,978</td>
</tr>
<tr>
<td>Bike Path Cycling</td>
<td>17%</td>
<td>3.3 Million</td>
<td>$49,852,358</td>
</tr>
</tbody>
</table>

### Crossover of Cycling Types

<table>
<thead>
<tr>
<th>Type Of Cycling</th>
<th>Mountain Biking</th>
<th>Road Cycling</th>
<th>Rail Trail Riding</th>
</tr>
</thead>
<tbody>
<tr>
<td>Road Cycling</td>
<td>46%</td>
<td>-</td>
<td>49%</td>
</tr>
<tr>
<td>Mountain Biking</td>
<td>-</td>
<td>25%</td>
<td>45%</td>
</tr>
<tr>
<td>Rail Trail Cycling</td>
<td>28%</td>
<td>17%</td>
<td>-</td>
</tr>
<tr>
<td>Bike Path Cycling</td>
<td>54%</td>
<td>59%</td>
<td>62%</td>
</tr>
</tbody>
</table>
### 3.1 Cycling Segments

The following graphic highlights cycling market segmentation identified for the North East. It shows key markets by proportion of cycling type and ‘value’ as measured by propensity to visit and potential yield.

The domestic cycling market is substantial and there is great opportunity to grow cycle tourism from identified market segments.

The research indicates that cycling enthusiasts have a higher propensity to visit and offer the greatest ‘value’ proposition to the region.

<table>
<thead>
<tr>
<th>Type</th>
<th>% of Market</th>
<th>% Value</th>
<th>Summary</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Mountain Bike Riders</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>High Involvement All-Rounders</td>
<td>33%</td>
<td>38%</td>
<td>Mostly males under 35, ride for fitness and the challenge, enjoy testing themselves over different trail types, mountain biking is a key consideration in destination choice.</td>
</tr>
<tr>
<td>Technical Riders</td>
<td>17%</td>
<td>31%</td>
<td>Mostly males under 35, ride for fitness and ‘time out’ in nature, enjoy a range of technical trails (downhill, slopestyle, pump tracks), well above average for overnight trips per year and spend per trip.</td>
</tr>
<tr>
<td>Endurance Riders</td>
<td>27%</td>
<td>22%</td>
<td>Mostly males under 45, focused on fitness and also ride for the immersion in nature, enjoy a range of cross-country trails, take fewer than average trips annually, spend more per trip than the average.</td>
</tr>
<tr>
<td>Low Involvement</td>
<td>24%</td>
<td>10%</td>
<td>Even gender split, older skew, ride for passive enjoyment of nature and the environment, prefer easy trails, fewer than average annual trips, and spend per trip well below the average.</td>
</tr>
<tr>
<td><strong>Road Cyclists</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>High Intensity Climbers</td>
<td>19%</td>
<td>28%</td>
<td>Mostly males around 35 years old, fitness and getting outside the key drivers for cycling, well aligned to hilly terrain and long mountain climbs, take more overnight trips per year than the average.</td>
</tr>
<tr>
<td>Flat Riding Enthusiasts</td>
<td>14%</td>
<td>25%</td>
<td>Mostly males aged between 25 and 45, motivations for cycling are fitness, getting outside (some also ride to commute), prefer flat terrain although also well aligned to scenic rides, above average for annual cycling trips and spend per trip.</td>
</tr>
<tr>
<td>Fitness Flat Riders</td>
<td>18%</td>
<td>19%</td>
<td>70% males, average age of 36, ride mainly for fitness and getting places, prefer leisure and faster rides on easy terrain as well as rides with scenic stopovers, take the average number of trips per year but spend above the average.</td>
</tr>
<tr>
<td>Lower Intensity Climbers</td>
<td>14%</td>
<td>17%</td>
<td>65% males, 35% females, majority aged under 35, fitness the key driver, above average for getting outside and spending time alone, well aligned to hilly terrain and long distance touring, more than average trips per year but lower spend.</td>
</tr>
<tr>
<td>Low Involvement Flat Riders</td>
<td>37%</td>
<td>11%</td>
<td>60% male, 40% female, more likely to be older age riders, cycle easy and scenic rides for fitness and commuting, well above average on trips per year and spend, representing less opportunity than other segments.</td>
</tr>
<tr>
<td><strong>Rail Trail Riders</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Cycling All Rounders</td>
<td>54%</td>
<td>55%</td>
<td>Mostly males under 45, rail trail riding one of the types of cycling enjoyed though other types more frequent (and generally more preferred), ride rail trails for fitness, enjoying nature and doing something different to the routine, take 3 overnight trips per year which include rail trail riding.</td>
</tr>
<tr>
<td>Rail Trail Families</td>
<td>16%</td>
<td>30%</td>
<td>More even gender spread, average age of 40 years old, key motivations for rail trail riding are spending time with the family and enjoying the natural environment, take an average number of trips per year but larger travel party leads to higher spend.</td>
</tr>
<tr>
<td>Rail Trail Only</td>
<td>31%</td>
<td>15%</td>
<td>60% male, 40% female, majority below 35 years, rail trail riding allows them to enjoy nature and try something different while exercising, rail trail is the preferred type of cycling, though other hobbies more important; fewer than the average number of trips per year and below average spend.</td>
</tr>
</tbody>
</table>

Source: BDA Marketing Planning
The North East region is the premier cycle tourism destination in both Victoria and Australia. The quality and extensiveness of its cycling infrastructure and product is unparalleled in other Australian regions. A profile of cycling assets highlights the following comparative advantages of North East Victoria:

- North East Victoria boasts the two longest rail trails in Victoria: The Great Victorian Rail Trail and Murray to Mountains;
- North East Victoria has Australia’s premier rail trail product (the Murray to Mountains). This is measured in terms of quality of trail surface, scenery and complementary product and experiences;
- North East Victoria has around 50% of all formalised mountain bike single tracks in Victoria;
- Mt Buller is the number one destination for mountain biking in Australia. This is measured by the distance of formalised trail, quality of trail construction, combination of cross country and linked gravity trails, scenic qualities and complementary commercial accommodation offer; and
- North East Victoria has six of the toughest 15 road cycling climbs in Australia and no other region can boast five category 1 and hors category climbs accessible from one destination (E.g.: from Bright/Mt Beauty).
4.1 Rail Trails

The rail trails of the North East include the two longest rail trails in Australia, the Murray to Mountains and the Great Victorian Rail Trail. The Murray to Mountains is Australia’s premium rail trail experience being the longest sealed rail trail with many villages and food experiences within proximity of the trail.

Further extensions to the Murray to Mountains proposed in the short term include the extension from Beechworth to Yackandandah and enhancements in key sections of the trail which will provide a greater level of experience.

The Great Victorian Rail Trail is the longest rail trail in Australia. Further work should be considered to activate the trail by developing complementary product that creates an improved trail experience for visitors and provides stronger destinations to grow visitation.

The High Country Rail Trail is still under development with further extensions planned which will link Tallangatta to Corryong. The High Country Rail Trail has been largely delivered by volunteers and requires additional funding to be completed.
4.2 Road Cycling

Road cycling has been identified as a major competitive advantage of the North East. The main reason for this is that the cycling climbs of Victoria’s North East cannot be replicated as the cycling is intricately linked to the region’s geography and topography.

An audit of the current road cycling network shows an exceptional amount of road cycling opportunities for visitors including long mountain climbs and easy road cycling loops.

Road cyclist safety has been identified as an ongoing concern for the region and the need for infrastructure to improve rider safety is critical for the future growth of road cycling in the North East. This has been verified with market testing which clearly identifies the link between perceived cycle safety and visitation for cyclists.

In particular, the sealing of road shoulders on key routes and sealing of back-roads would improve safety for all road users.
4.3 Cycling Events

The events calendar has a range of professional/elite cycling events and major participation events.

Events already drive significant economic outcomes to North East Victoria. This includes direct expenditure by attendees and their friends and family associated with pre, during and post event visitation.

Key event opportunities include:

- Events that utilise the rail trail;
- New road cycling participation events;
- High Country cycling festival which celebrates the many forms of cycling available in the region;
- Multi day High Country mountain bike event; and
- International slopestyle event.

October, November and December provide the most appropriate months for cycle event development. The above events should be explored for these months.
4.4 Mountain Biking

Mt Buller is the premium mountain bike destination in the North East in terms of trails development and supporting infrastructure. Significant investment in mountain biking has been made over 20 years at Mt Buller which has delivered an extensive cross country network, lifted downhill trails and Australia’s only IMBA accredited EPIC trail.

A number of other mountain bike parks have been developed by the mountain bike communities of the North East including Mystic Mountain, Big Hill, Beechworth Mountain Bike Park, Yack Tracks and Rifle Butts. These mountain bike parks provide opportunity for further investment in future trails.

Falls Creek has invested significant funds recently which have created a high quality network, including a mix of gravity trails and cross country trails.

Recent development of the Hero Trail at Bright and Flowtown at Falls Creek has ensured the Alpine Region has continued to strengthen awareness in the mountain bike market.

The masterplan needs to consider an ongoing program of works that will keep the mountain bike market segments interested in the region, with a 10-year program of sustainable trail improvements so that each mountain bike park in the region has an investment project realised on rotation.

It will be important to build on existing mountain bike park destinations that are associated with clubs and alpine resorts, and have been long established with well-developed complementary product. Strengthening and expanding existing nodes should be prioritised over establishing new nodes so that mountain bike trail development becomes concentrated, which makes it easier to service for operators and provides a strong destination experience.
05 Strategic Considerations

5.1 Competition in Mountain Biking

It was widely acknowledged that the mountain bike sector is becoming very competitive. There are many areas across Australia that are investing heavily in quality mountain bike infrastructure and have backed this through targeted marketing. Derby in Tasmania is an example of this.

There is a need for a continuous program of mountain bike improvement works to keep the market interested in the region (a need to deliver the latest thing to promote annually).

Stakeholders in the region have highlighted the need for more green trails in order to develop the mountain bike market and to appeal to a wider audience. This is supported by research conducted into the mountain bike sector.

A strategic approach to make mountain biking appealing, accessible and easy to new entrants and beginners is critical for the future development of the sport. This includes consideration of the following:

- Easy mountain bike trails;
- Skills parks;
- Mountain bike training and skills sessions;
- More accessible mountain bike parks to towns;
- More accessible and better quality trails in key markets such as Melbourne to grow participation in the sport.

The masterplan needs to consider an ongoing program of works that will keep the market interested in the region, potentially with a 10-year program of sustainable trail improvements so that each mountain bike park in the region has an investment project realised on rotation.

This Masterplan identifies a range of new mountain bike investment projects across each of the mountain bike destinations which will engage and inspire mountain bikers to visit.

5.2 North East Cycling Credentials

Road cycling was identified as a major competitive advantage. The main reason for this is that the cycling climbs of Victoria's North East cannot be replicated as the cycling is intricately linked to the region's geography and topography.

By contrast mountain biking and rail trails can be replicated through investment in other Australian regions which is currently occurring.

Road cyclist safety has been identified as an ongoing concern for the region and the need for infrastructure to improve rider safety is critical for the future growth of road cycling in the North East.

In particular, the sealing of road shoulders on key routes and sealing of back-roads would improve safety for all road users.

The market research has confirmed this with 39% of road cyclists identifying this as the most appealing future service offered in the Victorian High Country.

North East Victoria’s road cycling credentials cannot be replicated anywhere in Australia. The Masterplan should consider delivery of safe road cycling initiatives on the key cycling routes in the North East.
5.3 Enhancing Rail Trails

There are over 300 kilometres of rail trail within North East Victoria (including the entire Great Victorian Rail Trail). The majority of rail trail riders are interested in only undertaking short sections of trail with a clear destination point in mind to create a rounded experience. The market assessment undertaken by BDA Marketing Planning highlights that the experiences most likely to encourage visitation include lookouts with Alpine views, 10-20km family focused trails, rest areas and tasting local produce.

The case is strong for the extension of the Murray to Mountains rail trail between Beechworth and Yackandandah as it will be providing a 20km experience that is linked to a village destination with food experiences at either end. It will also link existing winery product on the trail.

Proposed enhancements on existing trails will also achieve the preferences of visitors for creating a more engaging appealing visitor experience.

Creating additional extensions to rail trails that have limited product, limited experience and do not link to destinations and villages should be considered as a secondary investment after enhancements to existing trail networks.

The establishment of short and interesting sections of rail trails in the High Country should be a key consideration for future investment. The Masterplan should acknowledge rail trail sections that may be enhanced to provide visitors to key destinations with a compelling experience.

5.4 Cycle Friendly Towns

Almost every consultation session conducted in a major centre or town in the North East identified the need for a much improved in-town network of cycle trails to link town centres with their respective rail trail network, road cycling network and mountain bike parks.

For many stakeholders in townships, this network of trails was of greater importance than a bike hub concept as it was felt that many towns already offered a range of services that support cyclists such as bike hire and sales, food, beverage, information, mechanics, etc.

This in town network was viewed as critical for families and cyclists who are not comfortable riding on the road network. Delivery of a quality network of in-town trails would strengthen the region’s appeal as a cycle destination.

The market research has confirmed the importance of in town linkages with “trails extending from towns/ railways to trail start” being the most appealing future service for road cyclists, mountain bikers and rail trail cyclists.

Cycle friendly towns should consider the following:

- Establishment of bike hubs to service and disperse cycle visitors;
- Improvement to cycling infrastructure at railway stations and connections to towns;
- In town cycle networks across major towns to support connection of town centres to cycling paths and mountain bike paths;
- In town cycle product for various markets including mountain bike skills parks, pump tracks, criterium circuits;
- Signage and information for cyclists; and
- Private sector businesses to support cycle tourism including skills programs, tour business, training facilities (gymnasiums).

The establishment of a cycle friendly town initiative including bike-hubs and township connector trails should be considered as a priority for the region. This will assist in growing yield and allowing easy access and dispersal of visitors to cycling product.
5.5 Marketing

There is strong support for marketing the region as a whole, focusing on intrastate and interstate in the short to medium term, and overseas in the long term.

Anecdotally, there are groups of mountain bikers who are coming from interstate that will visit several mountain bike parks across the region when they visit. This is supported by the research conducted by BDA which highlights the great opportunity to increase visitation through improvement to awareness of the products and services offered in the region.

Marketing campaigns to build awareness, improve perceptions and create visitor conversion are required. Specific components include:

- Awareness and Perceptions. Undertake a significant and sustained marketing and advertising campaign to intrastate and interstate markets to promote cycling tourism;
- Targeted Marketing. Targeted marketing should be considered for the specific cycling segments, through a range of distribution points; and
- Activate a high profile and sustained PR/communications campaign.

Delivery of a marketing campaign which leverages from the Ride High Country brand should be implemented to support existing and new investment in cycle product in the region. This will ensure that return on investment into cycle product and infrastructure is achieved.
5.6 Mountain Bike Park Land Tenure and Management

There has been significant investment in mountain bike trails across Australia, however the sustainability of maintaining large areas of formalised single track is often overlooked. Tracks in the North East are largely maintained by mountain bike clubs and the Resort Management Boards of Mt Buller and Falls Creek. The development of further trail networks in the North East must be supported by land managers and cycling clubs, to dedicate resources to maintain trails over time.

The planning for mountain bike paths and future rail trail investment requires the support of land owners and land managers. The masterplan needs to carefully consider whether projects have the support of land managers or identify strategies to gain support.

A risk to investment is the development of costly infrastructure within areas that are controlled by other users and then not maintained to a high standard.

Mountain bike parks need to be considered as a key recreation asset, similar to other sporting and recreational assets that are managed by Local Government Parks Departments. Responsibility of maintaining these assets should sit with Local Government due to their importance for local community health and wellbeing and economic benefits that they bring to the region. The Resort Management Boards have taken the responsibility to manage and maintain their mountain bike parks, however many of the Local Governments of the North East have not taken the same level of responsibility.

5.7 Cycle Transport and Access

Transport is a major issue and was discussed broadly across the region. The key issues for transport are:

- Irregularity of current passenger rail and bus services;
- Limitation of 6 bikes per train;
- The inability to take bikes on buses;
- The poor level of infrastructure at railway stations to support cyclists; and
- Links from railway stations to towns or to existing rail trail networks.

These issues call for a considered response in the masterplan to improve transport links in the region for cyclists.

Transport was identified as a major issue facing the growth of cycle touring in the North East. A specific project that seeks to address transport into the region is required. This project would include improvement to infrastructure and services across the region. Specifically, the following would need to be considered:

- Flights to Albury and ability to carry bikes onto the regional airlines;
- Services, infrastructure and information at Albury Airport including bike hire, storage lockers (for bike bags etc), information for the region;
- Regular train services from Melbourne to Benalla, Wangaratta, Chiltern, Wodonga and Albury;
- Bike hub infrastructure at train stations including storage lockers, information, bike hire services;
- Cycle path links from train stations to rail trails / town centres;
- Bike carriers on buses to be explored and implemented; and
- More regular bus services.

Transport was considered a key priority for all cycling segments. This Masterplan addresses the need to provide a consistent bike friendly transport system.

5.8 Complementary Product

The market research shows that one of the main reasons why road cyclists and rail trail cyclists visit the region is due to the food, wine and craft beer experience. The High Country has significant strengths in this space, providing strong motivation to visit.

Given the importance of complementary product to attracting and servicing cyclists in the North East, a range of private sector investments are needed to support cycle tourism, including investment in food and beverage tourism, visitor accommodation and tours.

A targeted facilitation and investment attraction program should be delivered in the region to assist current private sector proposals are delivered and to attract other large investors to the region.
5.9 Cycling Culture

The best cycling destinations in the world not only have great cycling infrastructure and networks, they are also home to a well-developed cycling culture that is present in the community and businesses.

The North East has a number of nodes that already have a strong developing cycling culture such as Bright, Beechworth and Mansfield. The cycling culture is the result of not only attracting many cyclists to the region, but a high participation rate of cycling amongst the local community.

The North East Victoria Cycling Optimisation Masterplan should consider initiatives that provide an immersive cycling culture including:

- Bike hubs;
- Cycle friendly businesses;
- Safe roads; and
- Cycle training programs.

Investment in consistent and branded cycling signage and information across all disciplines is required to provide a seamless experience that represents the well-developed cycling culture of the region.

5.10 Cycling Events

Cycling events are important for growing the cycling brand of the North East and exposing new markets to the region. The Peaks Falls Creek is an example of event which attracts a large number of visitors from interstate and some from overseas to experience this iconic and challenging ride.

The event calendar shows that there is a concentration of events during the warmer months and very few cycling events in winter and shoulder periods such as May.

Targeting appropriate events in these shoulder periods should be considered in order to attract and disperse visitors across the year. In addition, many of the larger cycling events are concentrated to the Alpine Shire area. Other locations that have good cycling credentials but limited events should be explored for event attraction such as Towong Shire, Indigo Shire and Mansfield Shire.

A focused procurement strategy for cycling events with potential funding allocation should be considered in the masterplan.
By 2028 Victoria’s High Country will be recognised as the lead cycle tourism region in Australia, attracting more cycle visitation and yield than any other destination. It will do this by delivering a world-class and seamless ride experience across all cycle disciplines, offering premium tracks, trails and routes supported by outstanding cycle tourism services and products.

6.2 Masterplan Framework
6.3 Strategic Objectives

The following strategic objectives for the cycling masterplan respond to the key strategic considerations identified through preparation of the report.

Objective A
Increase cycling visitors to Victoria’s High Country.

Objective B
Deliver cycling product, infrastructure, experiences and services to meet cycling market need.

Objective C
Increase yield from cycle visitors.

Objective D
Address gaps in cycle infrastructure and build on the existing cycle infrastructure network.

Objective E
Secure private sector investment to meet the needs of cycle visitors.

Objective F
Grow the High Country visitor economy through cycle tourism.

Objective G
Encourage dispersal of visitors throughout the High Country for cycle experiences.

6.4 High Country Cycle Tourism Targets

The following targets have been adopted drawing on current visitation and investment knowledge and provide achievable targets for the region.

Between 2018-2022

• Victoria’s High Country will attract an additional 100,000 cycle visitors per annum.
• Victoria’s High Country will attract $60 million in private sector investment in tourism related product, services and infrastructure that leverages from cycle tourism.
• Victoria’s High Country will attract an additional 50,000 interstate visitors per annum.

Between 2022-2028

• Victoria’s High Country will attract an additional 150,000 cycle visitors per annum.
• Victoria’s High Country will attract an additional $100 million in private sector investment in tourism related product, services and infrastructure that leverages from cycle tourism.
• Victoria’s High Country will attract an additional 60,000 interstate visitors per annum.
• Victoria’s High Country will attract an additional 20,000 international visitors per annum.
07 Theme One: New and Enhanced Cycle Product and Experiences

7.1 Direction

Deliver an ongoing program of new and enhanced cycle tracks and trails that entice and excite the target markets to visit the High Country Region.

Projects to be delivered under this theme will provide the catalyst for attraction of cycle visitors to the North East across road cycling, rail trail and mountain bike markets.

It is important that continuous investment and refreshment of products and experiences is delivered to keep pace with competitor regions and to provide new and interesting trails that entice visitors.

7.2 Key Performance Measures

- Level of investment in cycle product and infrastructure such as mountain bike trails, road cycling infrastructure and rail trail extensions and enhancements [Source: Various Government Entities];
- Growth in cycle visitors to the region [Source: Tourism Research Australia, National Visitor Survey]
High Priority Investments

Murray to Mountains Extension - Yackandandah to Beechworth

Category: Rail Trail
Project Investment: $6.2 Million
Projected New Visitation from Initiative: 7,663
Ongoing Economic Impact [Hume Region]: $5.3 Million (Output) + 22 Jobs

Description: The proposed Beechworth to Yackandandah extension of the Murray to Mountains trail is located in Indigo Shire, and will be 31.4 km in length.

Much of the proposed extension will run alongside roadways, plus one section that follows Magpie Creek to the east of Beechworth. In some sections the extension will follow existing shared use roads or be contained within the road reserve, therefore not requiring land acquisition and development. In other instances, such as the Magpie Creek corridor, a new trail will need to be constructed. Current land use in the study area is predominantly road reserve, along with sections of protected woodlands (Biosis, 2016).

The extension will provide users with attractive rural views, with the trail also crossing a number of major watercourses, including Magpie, Reedy and Yackandandah Creeks, along with a number of smaller watercourses that traverse the area.

Next Steps: Finalisation of detailed drawings for the trail are required followed by tendering the construction of the trail.

Murray to Mountains Enhancements

Category: Rail Trail
Project Investment: $11.6 Million
Projected New Visitation from Initiative: 17,754
Ongoing Economic Impact: $12.3 Million (Output) + 65 Jobs

Description: The High Country aspires to own the best rail trail network in the Southern Hemisphere. The Murray to Mountains Enhancements project has been developed to assist the High Country in realising this vision, developing concepts for a range of artistic, interpretive and architectural installations that will differentiate the regional offering from its competitors, and act as a key tourism driver for the region.

The project, which includes public art, landscaping, improved amenity options and new commercial opportunities, will effectively establish the region’s rail trail network as a true hero tourism product that will be central to delivering strong outcomes for the local visitor economy. The Enhancement project aims to:

- Make the Murray to Mountains Rail Trail the preeminent rail trail in the Southern Hemisphere.
- Drive repeat visitation and advocacy for the Murray to Mountains Rail Trail through enhancing the visitor experience.
- Inspire, delight, encourage talk-ability and social media shareability so as to position the Murray to Mountains Rail Trail as a ‘must do’ accessible cycling experience to Australian and international audiences.

Next Steps: Finalisation of detailed concepts.
**Mansfield to Mt Buller Cobbles**

**Category:** Road Cycling  
**Project Investment:** $2.9 Million  
**Projected New Visitation from Initiative:** 12,571  
**Ongoing Economic Impact [Hume Region]:** $8.7 Million (Output) + 46 Jobs

**Description:** Delivery of a signature ride for Victoria’s High Country that will be unique in the context of Australia. The ride which links Mansfield to Merrijig through scenic backgrounds would provide Australia’s own version of the Tour of Flanders.

This route would provide an alternative to the Mt Buller Road which is seen by many cyclists as unsafe due to the 100km speed limit and lack of road shoulders.

The distance of the route would be 27 kilometres, with an additional 32 kilometres to the top of Mt Buller.

**Next Steps:** Undertake a business case for the project.

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**High Country Safe Road Cycling Program**

**Category:** Road Cycling  
**Project Investment:** $15 Million +  
**Projected New Visitation from Initiative:** 14,335  
**Ongoing Economic Impact [Hume Region]:** $9.9 Million (Output) + 52 Jobs

**Description:** This project will deliver road shoulders, safety signage and cyclist signage for the key cycling climbs and routes in Victoria’s North East as well as strengthening potential iconic routes. Specifically, this includes:

- Road shoulders between Merrijig and Mirimbah;
- Road shoulders between Mansfield and Jamieson;
- Road shoulders between Bright and Harrietville;
- Cyclist warning signals for motorists on all major climbs: Mt Buller, Mt Hotham, Mt Buffalo, Falls Creek and Tawonga Gap (similar to Deans Marsh Road, near Lorne);
- Consistent cyclist signage on major climbs throughout the North East.

**Next Steps:** Undertake a masterplan for key road links and prepare costings to deliver the project.

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**Beechworth to Yackandandah Mountain Bike Trail**

**Category:** Mountain Biking  
**Project Investment:** $1.7 Million  
**Projected New Visitation from Initiative:** 12,521  
**Ongoing Economic Impact [Hume Region]:** $5 Million (Output) + 46 Jobs

**Description:** The Beechworth to Yackandandah mountain bike trail will provide a new mountain trail with endurance and gravity components linking the two towns.

A feasibility study has been completed by Indigo Shire Council which identifies the preferred concept.

The trail will link not only the towns but key heritage assets within the Beechworth Heritage Park and the Yack Tracks mountain hike park.

The project has strong support from the community and mountain bike clubs that operate in the area.

**Next Steps:** A detailed planning study is required which will deliver ground truthing and detailed concept. This will need to be supported by specialist cultural heritage and environmental assessment reports.
Falls Creek Mountain Bike Network Expansion

Category: Mountain Biking  
Project Investment: $2.8 Million  
Projected New Visitation from Initiative: 10,049  
Ongoing Economic Impact: $6.9 Million (Output) + 37 Jobs  

Description: Whilst Falls Creek has invested substantially in mountain bike infrastructure, the current network is still only enough to keep a strong and fit rider content for less than half a day’s riding.

There is need to expand the network substantially to create enough trails to ensure mountain bikers stay overnight. Falls Creek RMB has identified the following expansion:

- Gravity trails aligned to the new Eagle Chair/ Village Bowl development;
- Trails are proposed to be built out to Mt. McKay and into the Sun Valley/Lake Precinct;
- “High Country” aqueduct trail network.

Next Steps: Concept design is required to implement an expanded system of trails at Falls Creek.

Mt Buller Mountain Bike Park Improvements

Category: Mountain Biking  
Project Investment: $2 Million  
Projected New Visitation from Initiative: 14,282  
Ongoing Economic Impact: $9.9 Million (Output) + 52 Jobs  

Description: Until recently Mt Buller was the clear leader in mountain bike parks within Australia. It had the most kilometres of single track in Australia, the only IMBA EPIC ride and an extensive downhill network.

There is growing competition from Derby in Tasmania and Cairns for the title of Australia’s premium mountain bike park, with both locations attracting significant funding and quality trail development.

A range of improvements to Mt Buller’s mountain bike park have been identified by stakeholders associated with Mt Buller. These include:

- New Iconic Flow Trail: End of Copperhead to Plough Shed – A new flow trail that would link the northside trail network to the Delatite Trail. This could be the next Flowtown or Hero trail.
- EPIC Improvements including removal of Corn Hill Climb and dangerous downhill section and replacement of final EPIC climb from Telephone Box Junction.
- Another Dark Blue downhill trail next to Abom and International. This would provide a new contemporary downhill/ gravity trail with A and B lines suitable for a wider market.
- Opening of Klingspor again. Improvements to the Klingspor trail for downhill mountain bikers.

Next Steps: A masterplan should be developed for the next stage of works for Mt Buller, followed by a quick turnaround of investment in a new flowtrail from Copperhead to the Plough Shed.

Mystic Mountain Bike Park Improvements

Category: Mountain Biking  
Project Investment: $80K for Masterplan  
Projected New Visitation from Initiative: N/A  
Ongoing Economic Impact: N/A  

Description: Mystic Mountain has been established as a mountain bike park for many years and has a strong club which has supported its development over years.

Whilst there is an extensive amount of trail within the park, its organic development over the years has led to a confusing system of trails that is not visitor friendly. Rationalisation of the trail network is required to better cater for visitors as well as much improved signage. Moving the trail head to Pioneer Park will provide much needed visitor facilities.

Continued investment in iconic trail developed such as the Hero trail will allow Mystic Mountains to remain a popular destination for mountain bikers.

Logging within the Mystic Mountain Bike Park presents an ongoing challenge and risk for continued investment. This highlights that a longer term permanent solution should be considered such as purchase of the land.

Blue sky thinking has identified the potential for a gondola or lift to the highest peak which would create a multipurpose attraction in the heart of Bright.

These ideas and others should be further explored in a detailed feasibility and masterplan for the site.

Next Steps: Seek funding support for a feasibility study and masterplan for Mystic Mountains that provides a long term plan for the site.
08 Theme Two: Cycle Friendly Region

8.1 Direction
Implement world’s best practice initiatives that provide a visitor friendly cycling experience for all cyclists with up to date and clear visitor information, orientation points, signage, services, supporting transport infrastructure and bike hubs.

This direction is focused towards the establishment of a region that not only delivers quality cycling product but provides infrastructure that supports the cycling experience and enhances the cycling culture of the region.

8.2 Key Performance Measures
- Growth in Cycling Visitors [Source: Tourism Research Australia, National Visitor Survey];
- Growth in Visitor Expenditure [Source: Tourism Research Australia, National Visitor Survey];
- Increase in Awareness of High Country Region and Cycling Product [Source: Independent market research tracking].
High Priority Investments

Bike Ready Transport Initiative and Orientation Hubs

**Category:** Bike Ready Transport  
**Project Investment:** $3 Million

**Description:** This project involves the delivery of a range of bike ready transport initiatives that will strengthen connectivity within and access to the North East.

Initiatives in this plan include:

- Intra region regular bus services that have a bike trailer and connect the key cycling and non-cycling destinations within the region.
- Services, infrastructure and information at Albury Airport including bike hire, storage lockers (for bike bags etc.) and information for the region;
- Improvement to train services to the North East including improved provision for bikes on train carriages; and
- Bike orientation hubs at Benalla, Wangaratta and Wodonga railway stations with information point, showers and lockers.

**Next Steps:** Development of a transport implementation plan for the region.

Primary Bike Hub Investment and Township Trail Connections

**Category:** Bike Hubs  
**Project Investment:** $6 Million

**Description:** Primary bike hubs that require short term activation and investment include:

- Mansfield Bike Hub;
- Bright Bike Hub;
- Beechworth Bike Hub;
- Beechworth Gaol Precinct; and
- Pioneer Park Event Precinct.

These bike hubs will also require trail connections which will link current mountain bike parks, rail trails and road cycling routes.

The bike hubs will provide the infrastructure platform that will form the base of a transport and service network which includes bike hire, training, visitor services, tours, shuttle buses.

Public sector investment will vary depending on the bike hub however, this may include:

- Trail network information and maps;
- Bike maintenance equipment and tools;
- Skills area including pump track;
- Bathroom and shower facilities;
- Events facilities; and
- Bike wash down area.

**Next Steps:** Masterplans and feasibility studies for cycle hubs and bike connections.
High Country Cycling Culture

**Category:** Cycle Friendly Region

**Description:** The North East has a number of nodes that already have a strong developing cycling culture such as Bright, Beechworth and Mansfield. The cycling culture is the result of not only attracting many cyclists to the region, but a high participation rate of cycling amongst the local community.

The region is being promoted as Australia’s premier cycling destination and the experience on the ground should reflect this. Initiatives that would enhance the cycling cycle culture of the region include:

- Consistently branded cycling information boards at all bike hubs and orientation points;
- Consistent approach to mountain bike directional signage across all mountain bike parks that is on brand;
- Consistent approach to rail trail signage;
- Bike friendly businesses (leveraging from the existing bike friendly program);
- Welcome signage for cyclists to key bike towns;
- Consistently used bike safety signage;
- Reinforcement signage that is branded for road cyclists on key cycle routes and climbs; and
- Consistently branded visitor information services and collateral.

**Next Steps:** Development of a visitor services and signage masterplan and implement the findings.

8.3 Economic Impact from Cycle Friendly Region Projects

The High Country Cycle Friendly initiatives have overlap in their potential economic impact as the projects are mutually inclusive in that the Bike Hubs will also support transport and provide the opportunity to provide a consistent approach to cycle information, trail signage and cycle culture.

The economic impact assessment for this set of projects are undertaken as one. The results are provided below:

**Projected New Visitation from Initiative:** 21,902

**Ongoing Economic Impact:** $15 Million (Output) + 80 Jobs
9.1 Direction

Ensure that complementary food, beverage and accommodation product is continuously developed in the region to meet cycle tourism market needs and expectations.

Research has demonstrated that a strong cycle tourism destinations needs to go beyond the provision of tracks and trails. Quality food, beverage and accommodation delivered by the private sector is essential for attracting cycle markets, generating yield and ensuring visitors return again.

The private sector investment opportunities are listed in this section, without tiering as they will be leveraged from other investments identified in the report.

9.2 Key Performance Measures

- Level of Private Sector Investment [Source: Building Approvals Data];
- Growth in Visitor Activity Consumption: Food, wine, beer [Source: Tourism Research Australia, National Visitors Survey];
- Growth in Length of Stay and Visitor Nights [Source: Tourism Research Australia, National Visitor Survey]; and
- Visitor Expenditure Per Person [Source: Tourism Research Australia, National Visitor Survey].
High Priority Investments

Investment Facilitation for Local Small and Medium Scale Investment

**Category:** Private Sector Activation  
**Project Investment:** $60 Million  
**Ongoing Economic Impact:** $44 Million (Output) + 234 Jobs

**Description:** There are a number of small and medium scale private sector investors that have identified interest in establishing new accommodation, food and beverage products in the region.

Some of the medium scale investments that have potential for delivery include:

- Beechworth Gaol Bike Hub Accommodation and Hotel;
- Wangaratta Self Contained Apartment Hotel;
- Large Restaurant, Distillery and Events Centre, Mansfield;
- Conversion of existing motels to bike friendly motels; and
- Food, wine, beer and pop ups which respond to bike hubs and rail trail investment.

Around $60 million of investment is confirmed which will respond to existing and proposed investments in the Rail Trail Activation projects and Bike Hubs Projects.

Government support is required to facilitate this investment including:

- Facilitation officer to provide advice and assist with delivery;
- Funding of feasibility studies and masterplans where required; and
- Investment in buildings that are Government owned to make good for private sector use.

**Next Steps:** Plan out an investment framework.
Attraction of Large Scale Internationally Ready Operators

Category: Private Sector Activation
Project Investment: $110 Million
Ongoing Economic Impact [Hume Region]: $41 Million (output) + 218 Jobs

Description: Forecast growth for the region will lead the requirement for new larger scale investors to deliver new accommodation and services product to meet the needs of visitors.

Examples of investment opportunities identified include:

• Large integrated resort accommodation in Mansfield and/or Bright;
• Contemporary hostel in Bright;
• High end boutique accommodation;
• Nature based experiential accommodation; and
• Internationally renowned adventure tour operators.

In order to deliver on these opportunities preliminary work needs to be undertaken including market sounding, land use planning and site analysis, business case, prospectus development and direct investment attraction.

Next Steps: A staged approach to attracting large scale investment in the region including market sounding, site analysis, feasibility and prospectus development.
10 Theme Four: Driving Demand in Cycle Tourism

10.1 Direction

Deliver ongoing marketing initiatives and events that position the High Country as a leader in cycle tourism and grow demand for the regional bike offering.

10.2 Key Performance Measures

- Growth in Cycling Visitors [Source: Tourism Research Australia, National Visitor Survey];
- Growth in Visitor Expenditure [Source: Tourism Research Australia, National Visitor Survey]; and
- Increase in Awareness of High Country Region and Cycling Product [Source: Independent market research tracking].
High Priority Investments

Ride High Country Marketing

Category: Marketing  
Project Investment: $4 Million  
Projected New Visitation from Initiative: 92,200  
Ongoing Economic Impact: $64.2 Million (output) + 337 Jobs

Description: Delivery of a four year marketing campaign that will build awareness and motivate cyclists to visit the High Country.

One of the primary tourism issues facing North East Victoria is lack of awareness of the regional offering, as identified via multiple research commissioned for the High Country across a range of product categories. This problem was also clearly recognised in the cycle tourism research encompassed by the masterplan, which illustrated that a significant portion of the rider market is unaware of the region’s cycle tourism credentials, however is motivated to travel and spend in Victoria’s North East once made aware of available cycle experiences.

A lack of consumer awareness points to the need for sustained investment in a marketing campaign of scale – one that has the ability to move current and potential market segments from awareness through to inspiration and finally conversion – to generate cycle-related visitation and yield opportunities for the region. Such a campaign will be key to the region realising its vision of owning cycle tourism and being recognised as the primary cycle tourism destination in the State. This marketing will also be critical in driving the visitation volume required to create a critical mass that both attracts and sustains private and public sector investment in this space, and ongoing product and service evolution.

To this effect, investment in a strong brand campaign is required to drive destination awareness amongst a mass market. This will require heavy investment in above the line activity, complemented by segment specific tactical activity. These efforts will be guided by the cycle tourism research, which points to:

- The need for a multi-disciplinary campaign due to the high level of cross-over between the road cycling, mountain biking and rail trail disciplines.
- A primary focus on domestic visitors, which is the largest and highest yielding market for the region (99% of current visitation). This includes a specific focus on increasing the region’s core intrastate market, where numbers are highest and there is greatest potential to optimise visitation and yield in the short to medium term, followed by a move into the potentially higher yielding interstate market followed by international considerations (primarily Western Hemisphere).
- The importance of promoting the Ride High Country brand, which resonates strongly with cyclists across all disciplines, demonstrating strong capacity to move target markets from awareness to conversion. With an established market presence, the Ride High Country brand – rather than a generic State offering – is best positioned to drive positive tourism outcomes for the region.
- Consideration for high impact, large format out of home advertising, which has the greatest effect (reach against cost) on raising awareness and driving positive perceptions of the Ride High Country offering amongst the region’s target markets.
- The importance of using inspiring imagery that showcases the region’s distinctive natural assets in association with cycle tourism, which is considered a competitive strength of the High Country.

Next Steps: Prepare a detailed marketing plan.
Summary of Impacts: Tier One High Priority Projects

The table to the right highlights that Phase 1, Tier 1 projects will produce an ongoing economic impact of $106.1 million in output in the Hume Region and contribute an additional 535 ongoing jobs in the region. This modelling suggests that cycle visitation and the corresponding impacts of additional cyclists attracted to the region will double the current visitation and economic impact of cycle tourism in North East Victoria. The delivery of Phase 2 Projects will have an additional impact of $84.7 million in output and 419 jobs.