

Gippsland Tracks and Trails **FEASIBILITY STUDY**

August 2019

Project Partners



This report was prepared by TRC Tourism for South Gippsland Shire Council in relation to the development of the Gippsland Tracks and Trails Feasibility Study.

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‘Trails...support growth to our visitor economy, enable a healthier lifestyle and enhance wildlife corridors’.

South Gippsland Paths and Trails Strategy 2017

Hikers

Executive Summary

The Gippsland Tracks and Trails Feasibility Study is an initiative of the Gippsland Local Government Network (GLGN) with project partners Destination Gippsland Pty Ltd and the Gippsland Mountain Bike Club Inc.

Significant planning work has already occurred across Gippsland, with the various project partners recognising the substantial benefits tracks and trails provide for local residents through health and well-being and economic development, and for visitor enjoyment and economic growth in the region. Several of the partners have already developed strategies expressing the intent to grow and connect trail opportunities across Gippsland with some projects already implemented, or ready to be implemented through recent funding commitments. A summary of some of the more relevant documents can be found in Appendix B of this report.

This Study will unite all of the existing significant plans and projects with a common Vision and Goal for investment, collaboration and governance for Gippsland tracks and trails into the future as they relate to attracting visitors to Gippsland.

The Study recommends several iconic trail experiences, interconnecting trail networks and growth of complementary trail products and services leading towards increased visitation, economic opportunities and greater overnight stays in the region.

It should be noted that this document has been developed in concurrence with the Destination Management Plan (DMP) so that it may complement the work, research and priority projects identified in the DMP for broader Gippsland.

Phases towards development of a feasibility study for the future of Gippsland tracks and trails:

- PHASE 1.
Literature Review & Research Report
- PHASE 2.
Consultation & Track and Trail Assessment
- PHASE 3.
Feasibility Study
- PHASE 4.
Advocacy Materials

Vision and framework

Through literature and market research, consultation, site assessments and alignment of public and private priorities, this Study represents the outcomes of the various project partners working together, establishing a united vision and providing a targeted framework for Gippsland Tracks and Trails into the future.

VISION

Gippsland will be recognised as a world class trails destination offering a diversity of outstanding landscapes and experiences.

Pathway to the future

There are 6 core areas where coordinated actions are desirable to deliver a world-class regional trail network that grows visitor economy outcomes for Gippsland. The study discusses each of the six areas and makes a series of recommendations on each.

By looking at this opportunity holistically, the study provides integrated opportunities and frameworks from which to grow collaboration in the region, to grow the experiences and to grow the industry (and the community support behind it), leading to additional people visiting Gippsland to enjoy the trails for hiking, biking and walking.

The six core areas for coordinated actions:

- **Effective coordination**
arrangements to provide region-wide leadership and direction and assist collaboration and coordination
- **Consistent and collaborative planning**
provide consistent regional policies and approaches to trail use, design and construction standards and environmental sustainability
- **Delivering trail experiences**
a consistent approach to trail classification, network development and service delivery
- **Sustainable management**
maintenance and monitoring to ensure continued environmental and social sustainability
- **Supporting trail use and community involvement**
including support for the work of volunteer trail groups and encouraging trail use through programs and events
- **Marketing and communication**
effective ways to reach local and visitor trail markets

The trail network for the Gippsland region will be built around 3 trail classifications that form building blocks for managing, improving and marketing the network, meeting the needs of residents and visitors, and prioritising resources and investment. The framework is deliberately built around an objective to improve the visitor economy by attracting new and repeat visitation to Gippsland (and in some cases, keeping people in Gippsland longer), so it is acknowledged that trails will continue to be developed for community purposes outside this study.

Figure 1. Gippsland tracks and trails framework for the future



The signature trails recommended in this plan are those listed below. They are the trails in which investment will drive the highest visitor economy outcomes for the Gippsland region as a whole through driving increased visitation to the region.

They have been chosen based on the analysis in this plan relating to the market demand for experiences, the gaps in Gippsland’s trail offering, the opportunities Gippsland has to show case its raw natural and cultural products, and the diversity of landscapes it contains including coastal wilderness, alpine and foothill areas and rolling green hills.

Gippsland Signature Trail Experiences recommended in the study

Signature Walks	
1 Wilsons Promontory Circuit Track and upgrade (Planning as an initial step)	The Wilsons Promontory Circuit Walk offers a renowned multi day walk that includes the lighthouse in the southernmost part of mainland Australia, coastal forests and pristine beaches. With an experience upgrade that may include re-looking at the accommodation options on the trail (noting that the current plan of management may have to be changed), it will continue to present as one of Victoria's great walks.
2 George Bass Coastal Walk	The George Bass Coastal Walk while limited in its length at present, has had a government funding commitment to significantly change its length, style and appeal. Significant investment the walk will offer new campgrounds, access to villages, additional length and infrastructure to showcase the outstanding beauty of the Bass Coast.
3 Wilderness Coast Walk from Cape Conran to Point Hicks	With a master plan and feasibility to update the previous work undertaken, the Wilderness Coast Track could present an ideal 2 to 4 day experience along the coast from Cape Conran to Point Hicks with full serviced options, and the remaining walk from Point Hicks to Mallacoota as a wilderness style walk.
4 Sections of the Australian Alps Walking Track	Build on the market knowledge and appeal of the Australian Alps Walking Track including the serviced section branded the Great Walhalla Alpine Trail from Baw Baw village to Walhalla, and Hotham to Falls (currently in development). Continue to work with partners in the ACT and NSW to market and improve the trail.
5 The Sea to Summit (Feasibility Study)	Following the announcement by the Victoria Government, a feasibility will be undertaken to a trail from Mt Ellery in Errinundra NP to Bemm River with the potential for a multi-day hike through East Gippsland's forests with the option for serviced camping or accommodation available.
Signature Mountain Biking Hubs and Trails	
1 Develop the Central Gippsland Mountain Biking Hub with Haunted Hills as a centrepiece	Develop a central Gippsland Mountain Bike Hub based on the Haunted Hills with other parks in nearby areas forming a collective MTB offering. Formalising the parks in Glengarry and Avon Mount Hendrick as well as continued investment will see a significant visitor offer for mountain biking beyond the individual park's attributes.
2 Omeo MTB Hub Development	The development of the proposed Omeo MTB hub will see a world class facility with flow, cross country and other trails all leading from and into the town.
3 Feasibility for the Epic Trail in Central Gippsland	Develop a feasibility for an epic trail that descends from Baw Baw Alpine Village, and traverses through the forests of the Gippsland alpine areas arriving the Latrobe Valley. This trail could potentially change the game for riding in Gippsland and could use many existing trails.
4 The Timber Trail including options for accommodation and servicing	The potential for a timber trail ride through the west Gippsland forests with dedicated overnight accommodation for rides, while providing access to the villages would provide a strong commercial product similar to the successful models in operation in NZ.
Multi Use Trails	
1 Continued development of 'Rail Trails' that together will form the basis of a 'Gippsland Trail'.	Packaging the existing main rail trails and multi-use trails in Gippsland as the Gippsland Trail, and undertaking strategic connections between the various existing elements will over time provide a strong offering that can be undertaken or packaged into sections, or sold as a multi-day trail.
2 The development and implementation of the Gippsland Lakes Aquatic Trail.	Complete feasibility and market testing for a multi-day multi format trail that provides commercial opportunities based on the outstanding Gippsland Lakes.

Regional trails form the next level of importance from a visitor experience perspective. A larger number of regional trails that form the backbone of the network, they can bring additional people to Gippsland, keep visitors in the region longer, or act as the second tier of trails that people return to the region to do.

Local Trails are not listed as they are essentially the bulk of trails and those remaining. They are often important for communities for a variety of purposes and also often have a high level of community ownership and volunteerism attached to them. The management and decision making of those trails remains with the current manager.

Governance

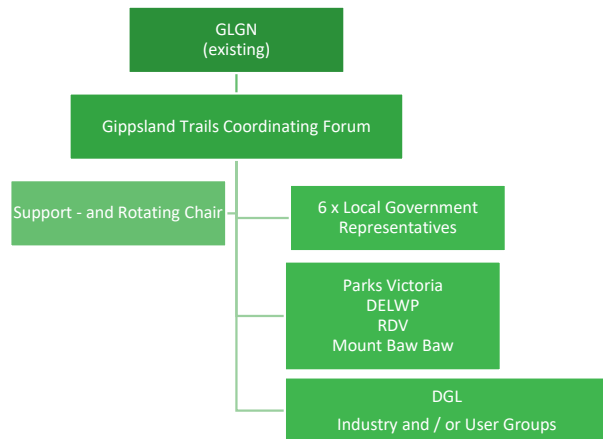
Ongoing collaboration, effective decision making and working together to continue to promote and develop trail experiences is fundamental to future success.

Gippsland has at least 10 agencies involved in direct management, development and maintenance of trails. This includes the 6 Local Government Areas, Parks Victoria, DELWP, Mount Baw Baw Alpine Resort, and Phillip Island Nature Park. This list excludes private businesses and committees of management operating within Gippsland.

In order to take an effective Gippsland wide view of trail development and management, effective coordination and governance is critical.

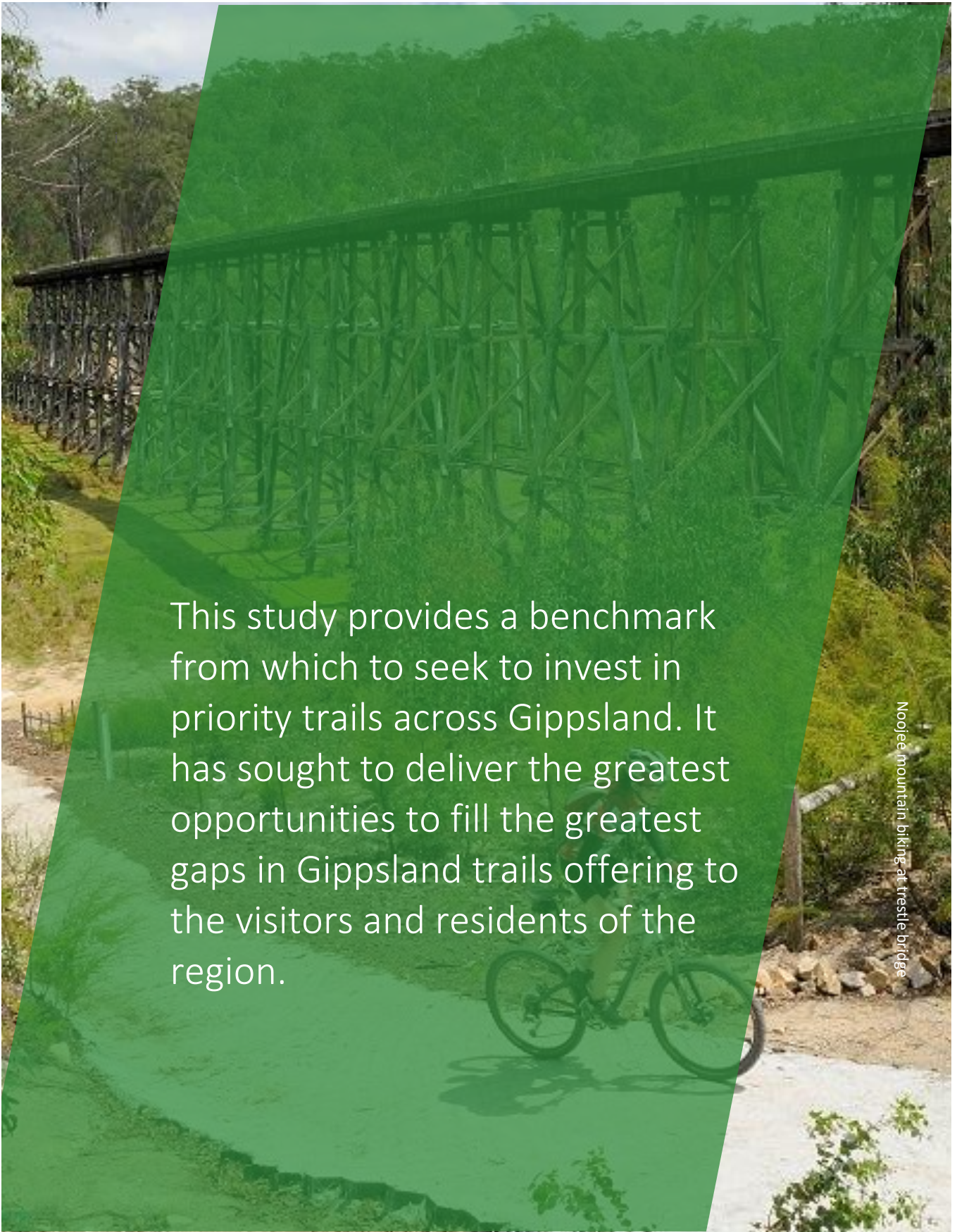
A proposed new group aligned to the existing Gippsland leadership forum Gippsland Local Government Network (GLGN) is proposed with a charter to collaborate and develop the trails based visitor economy in a systematic and planned way.

Figure 2. Proposed Governance Model for Trails Coordination in Gippsland



The study provides a strong evidence based and robust assessment of Gippsland. It takes a market based assessment of the visitor economy outcomes, with Signature Trails aimed at bringing more people into Gippsland, and provides recommended priority trail developments based on those assessments.

It is noted that achieving many of the Signature Trails may take some time and involve rigorous planning and feasibility assessments for each individual trail or hub. It is also recognised that some further development of on park accommodation may require both investors and government being willing to commit to a process that may include changes to plans of management. While these can seem long and difficult, and require the willingness of the community to embrace new approaches, the outcomes will be a repositioned Gippsland trail offering that attracts people to the region, keeps people in the region longer, and provides a boost to the visitor economy.



This study provides a benchmark from which to seek to invest in priority trails across Gippsland. It has sought to deliver the greatest opportunities to fill the greatest gaps in Gippsland trails offering to the visitors and residents of the region.

Noojee mountain biking at trestle bridge

1 Introduction

1.1 Purpose of the Study

TRC Tourism was engaged by a partnership including the 6 regional Councils, Destination Gippsland Ltd and the Gippsland Mountain Bike Club to develop this Gippsland Tracks and Trails Feasibility Study.

The report provides an assessment of trails across Gippsland and makes recommendations on opportunities for improving the current trails-based experiences. This includes the prioritisation and planning for improvements to existing trails and the development of future tracks and trails.

The intent is to establish Gippsland as a cycling, mountain biking and hiking and walking destination of national significance whilst providing economic and social benefit to the communities within the region. This aligns with the development of a Destination Management Plan by Destination Gippsland for the entire Gippsland region.

1.2 What are trails?

Recreational trails are invaluable. They connect people to places through travel, help us appreciate the natural and cultural world around us, they challenge people to climb mountains and they lead people to breathtaking views, they keep communities healthy and connected and bring economic benefits through tourism.

Trails come in all shapes and sizes and provide for a range of uses from walking, hiking, cycling, mountain biking, trail running and horse riding, to specially designed wheelchair and baby stroller friendly trails. Trails can be single or shared use, on roads, pathways, dirt tracks, old train lines and specially built trails for mountain biking or walking. Trails can be on water with non-motorised vessel use (kayak and canoes). Trails can even be a mix of adventures connecting land-based walking and riding with water trails.

Trails can be designed for various users. Local trails provide outdoor recreational opportunities for local communities and can aid in healthier commuting alternatives. There are also visitors who travel around the world seeking Instagram worthy #epictrail experiences. This means that trail users today have higher expectations about their trail experience. They are anticipating ease of planning and fact finding, access, high quality regularly maintained infrastructure, facilities and services and complementary packaged options including accommodation, food and beverage and other value-add activities. It is important that the user experience is central to each element of trail design and management.

The terms 'tracks' and 'trails' can be used interchangeably and for the purpose of this report, will have similar meaning, acknowledging that they may have different meaning to different people.

This report will focus on trails for single use (walking, hiking, cycling and mountain biking) and shared use (any combination of walking, hiking, cycling, water access such as canoeing, and mountain biking).

1.3 Location

Gippsland is in the south-eastern corner of the Australian mainland and covers a major part of the eastern state of Victoria, encompassing a land area of close to 41,600km². The region extends from its western end, adjoining metropolitan Melbourne's south-eastern boundary, to Cape Howe the most easterly point of Victoria. In the north, the region borders NSW and much of its northern boundary is defined by Victoria's high country. The region's southern boundary encompasses 700 km of spectacular coastline and includes the most southern point of the Australian mainland, Wilsons Promontory.

The region is comprised of six local government areas (LGAs) being Bass Coast Shire, Baw Baw Shire, East Gippsland Shire, Latrobe City, South Gippsland Shire and Wellington Shire. Bass Coast is in the unusual situation of straddling two tourism regions: Gippsland and Phillip Island.

Phillip Island and San Remo come under the regional development area of Gippsland, though from a tourism planning point of view these two areas sit separately from the Greater Gippsland region and act as a neighbour of tourism to Gippsland.

Figure 3. Location of Gippsland



1.4 Description

A unique part of Victoria, Gippsland covers almost 20% of the state's land mass. It is highly valued by visitors and local communities for its extensive forest reserves and national parks, watercourses and bushland, and a northern snow-topped boundary of the Victorian high-country juxtaposed with the extensive stretches of coastline to the south.

These natural assets provide a substantial opportunity for sustainable growth in tourism with iconic experiences already established around Phillip Island, Mt Baw Baw, Wilsons Promontory National Park and the Gippsland Lakes, which are the largest network of inland waterways in Australia. Visitors to the region can expect to find quaint villages, alpine towns and farming communities.

The Destination Management Plan provides further detail on markets, positioning, experiences and opportunities.

Gippsland is well known for¹: iconic nature; coast, beaches and Gippsland Lakes; national parks and mountain landscapes; villages; natural product and farmers markets; and Walhalla.

There are 33² national parks and significant reserves in Gippsland, many of which have tracks and trails for visitor enjoyment and appreciation of the natural area. This is in addition to substantial areas of State Forest, and other land tenure conducive to recreation and tourism businesses.

¹ <https://corporate.visitvictoria.com/resources/regional-insights/gippsland>

² <https://www.visitmelbourne.com/Regions/Gippsland/Things-to-do/Nature-and-wildlife/National-parks-and-reserves>

1.5 Stakeholders

There are a number of government and industry organisations that are involved (both directly and indirectly) in the visitor economy in the Gippsland region.

Table 1. List of the organisations involved in the visitor economy, trail management and promotion

Government	Tourism
Gippsland Local Government Network	Visit Victoria
Bass Coast Shire Council	Destination Gippsland
Baw Baw Shire Council	Destination Phillip Island
East Gippsland Shire Council	Victoria Tourism Industry Council
Latrobe City Council	LTOs
South Gippsland Shire Council	Industry Groups and Associations
Wellington Shire Council	Gippsland MTB Inc.
Department of Environment Land Water and Planning	Prom Coast MTB Club.
Parks Victoria	Australian Hotels Association
Mount Baw Baw Alpine Resort	Bushwalking Victoria
Phillip Island Nature Park	Bicycle Network
Sport and Recreation Victoria	Cycling Australia
VicRoads	Caravan and Motorhome Club of Australia Ltd
Victorian Fisheries Authority	Outdoors Victoria
Neighbouring Council areas such as Yarra Ranges Council	Industry Groups and Associations

Traditional Owners	Other
Gunaikurnai Land and Water Corporation (GLAWAC)	Local business operators
Bunurong	Local tourism operators
Bidwell	Property developers
Monero	Local Chambers of Commerce
Yuin	Walking and cycling clubs/groups
Other Groups	



While a destination may have world class trails, it is the combination of trails and the overall visitor experience that creates a trail destination, residents are proud of and visitors seek out.¹

Wellington Regional TRAILS FOR THE FUTURE |
A strategic framework for trails in the Wellington Region Sept 2017

Mallacoota - Hikers on beach

2 Current situation

2.1 People and communities

- The Gippsland region had a population of 271,416 people as at the 2016 census with an average age 45.³
- Regional Development Victoria has identified that an ageing population⁴ is one of the challenges facing the region, with people aged 65 years and over making up 21.7% of the population and family without children representing 45.6% of the population.⁵
- Gippsland has 70,749 families with an average number of children for all families of 0.6, and for those with children, 1.9 children per family.
- Unemployment at the time of the census in 2016 sat at 6.9% as compared with 6.6% for the State.
- The level of volunteerism sits higher than the Victorian average at 23% doing work in a voluntary organisation or group as compared to the average at 19%. This is a positive opportunity for land managers and organisations to mobilise community in delivering services or experiences.

2.2 Employment and industry

Cafes, restaurants and take-away food services were the tourism businesses that contributed the most to direct tourism employment in regional Victoria in 2016-17, with a 36% share of direct tourism employment. Regional Victoria's other top industry contributors to direct tourism employment included:

- Accommodation (16%)
- Retail trade (15%)
- Clubs, pubs, taverns and bars (7%)⁶
- Gippsland's economy is predominantly based around natural resources and commodities, with key industry sectors including agriculture, forestry, dairy and pastoral industries, fishing, and coal mining, oil and gas extraction and processing⁷
- In 2016-17, the non-metropolitan regions that contributed the most (number of persons) to Victoria's direct tourism employment were Murray, Great Ocean Road, Gippsland and Mornington Peninsula. (This includes Gippsland contributing 6,700 jobs or 4.7% of employment share of Victoria).⁸ There are currently 3,094 tourism businesses⁹ in the Gippsland region and in the year ending September 2018, tourism generated employment of approximately 8,900 people or 8.6% of Gippsland's employment (direct and indirect jobs).¹⁰ A breakdown of the locations of Gippsland tourism businesses can be viewed in Appendix A.
- With the exception of South Gippsland, each of these LGAs in the Gippsland region has a larger percentage of local workers employed in Accommodation and Food Services when compared to that of all Victoria (6.6%).¹¹

³ Quickstats.censusdata.abs.gov.au

⁴ <http://www.rdv.vic.gov.au/victorias-regions/gippsland>

⁵ ABS 2016 Census QuickStats – Gippsland (Commonwealth Electoral Divisions)

⁶ Regional Tourism Satellite Account – Victoria's Regions, 2016-2017

⁷ <http://www.rdv.vic.gov.au/victorias-regions/gippsland>

⁸ Regional Tourism Satellite Account – Victoria's Regions, 2016-2017

⁹ TRA Local Government Area Profiles, 2017

¹⁰ Business Victoria Factsheet – Gippsland – Regional Tourism Summary – Year Ending September 2018

¹¹ <https://economy.id.com.au>

2.3 Access

Ways to access Gippsland



The major road spine, the Princes Freeway (M1) from Melbourne, enters in the west and becomes the Princes Highway (A1) through to the NSW border in the east and then north to Sydney. It is also known as the Sydney Melbourne Touring Route.

The M420 connects Melbourne with Phillip Island with the South Gippsland Highway branching off this road and connecting southern Gippsland to the Princes Highway at Sale.

Other roads head north from the Princes Highway through the High Country to NSW, including the popular Great Alpine Road.



Latrobe City is serviced twenty times per day by train to Melbourne (2.5hr) with further rail and coach connections through to Bairnsdale and other East Gippsland towns.



V/Line coach service from Melbourne to South Gippsland, Bass Coast or the north-south service from Wonthaggi-Traralgon. Much of Gippsland off the main train line is also serviced by V/Line coach services.



Despite having eight public and one private airport, Gippsland lacks regular passenger transport. Melbourne's Tullamarine Airport is between 1.5hr and 6.5hr drive depending on how far east the trip commences.

East Gippsland is also accessible via Merimbula Airport in South East NSW.



Bounded by Westernport in the west and Bass Strait to the south, the Gippsland coast is home to five ports and two waterways including the largest series of inland lakes in the southern hemisphere. The region has many wharfs, jetties and boating facilities. There is a regular ferry service from Westernport (passenger only) from Mornington Peninsula to Phillip Island and French Island. There is also a short Ferry (vehicular) from Paynesville to Raymond Island. Phillip Island receives regular cruise ship visits and the Visitor Economy strategy proposes a car Ferry from Cribb Point to Cowes.

2.4 Existing trail experiences

Gippsland is a large and complex region, containing a variety of natural assets, landscapes and communities. The current trail offering is by its very nature, broad and diverse. In part this reflects the scale and the landscapes, and in part reflecting previous legacy of land uses.

Many existing trails have 'evolved' over time from what were bridle trails, gold era routes, cattlemen's access into the high country or old forest harvesting routes.

In order to understand the existing trail assets in Gippsland that might have a reasonable significance to the visitor economy, a database of trails has been compiled. It captures information across a number of the important elements required to deliver on the proposed trail framework and assessment criteria.

Information has been compiled on the following attributes of Gippsland's trails:

Summary of Trails database information

TRAIL TYPE	OVERVIEW OF GIPPSLAND'S CURRENT TRAILS	STRENGTHS
Short Walks	<p>Gippsland has a large number of high-quality short walks. Some occur in 'clusters' including areas such as Baw Baw's Noojee and Walhalla areas, The Princes Highway in East Gippsland that is important to the Sydney Melbourne Touring Route, shorter walks within and around the Wilsons Promontory National Park and other areas including the Strzelecki Ranges and South Gippsland.</p> <p>The walks are often well managed and traverse a range of high-quality natural areas.</p> <p>Some have little to no interpretation which can be a disadvantage for international and domestic visitors.</p> <p>Investment in short walks appears to be continuing.</p> <p>Most short walks include car parks, trail heads and many include toilets, although the quality of some may be deteriorating with age.</p> <p>The quality of the trail experience can vary although the highly sought-after trails are generally for higher visitor markets.</p>	<p>Clusters of high-quality walks often aligned to strong visitor markets.</p>
Mountain Bike Trails	<p>Gippsland boasts a number of quality mountain bike parks dedicated to use by mountain bike riders. These are generally managed in partnership between the land manager and local clubs although Councils are now seeing the economic advantages of high-quality trail destinations and are seeking to develop purpose-built areas such as the proposals for Omeo.</p> <p>Most of Gippsland's mountain bike parks range from 15 to 40 km of trails. This is generally considered on the low side for mountain bike 'destinations' and therefore are deemed to be generally serving regional and some domestic visitation, with the ability to grow further.</p> <p>There is also a desire for Bass Coast and other areas to develop mountain biking hubs in partnership with biking groups.</p>	<p>Growing community support for mountain bike parks and hubs.</p> <p>A sound base for growth with strong offerings in and around Central Gippsland and exciting proposals for Omeo and other potential sites.</p> <p>Potential for Bass Coast to develop a regionally focussed mountain bike park.</p>
Longer Distance Walking Trails	<p>Gippsland has a large number of long-distance walks, most of which are 'under-developed' and remain as remote hiking and walking opportunities. The exception is the Circuit Walk/Lighthouse Walk at Wilsons Promontory NP which offers higher levels of service including booking services, track rangers and water.</p> <p>The Alpine National Park, Croajingalong NP and other areas contain longer walks that are used in lower numbers,</p>	<p>Strong experiences and a variety of walk options in alpine, coastal and forested landscapes.</p>

TRAIL TYPE	OVERVIEW OF GIPPSLAND'S CURRENT TRAILS	STRENGTHS
	<p>however, offer strong experiences. Many are distant to market and long travel distances may be required.</p> <p>The Alpine Walks also tend to be shared with the neighbouring NE Victoria, and who with Parks Victoria are developing the Falls to Hotham Alpine Walk.</p> <p>The Walhalla to Baw Baw section of the AAWT is used for higher quality serviced walking. Falls to Hotham is also currently being developed by Parks Victoria.</p> <p>Navigation on many of the walks can be challenging and most require a strong self-reliance ability, good equipment and an ability to deal with emergencies should they arise.</p>	
Horse Trails	<p>Horse riding is an important activity for horse clubs and regional visitors, with some domestic visitation.</p> <p>A number of the region's trails are multiple purpose and horses share the trails with walkers and in some cases bike riders.</p> <p>Longer distance bridle trails exist mostly in the foothills and alpine areas, where a long history of horse use exists, tied to (in most cases) historical activity including cattle and gold.</p>	<p>Multiple use trails for existing horse-riding activity.</p>
Shared Use Paths (Rail Trails)	<p>Rail trail development continues to occur in Gippsland building on a strong trail base. Developments include linking Lakes Entrance to the East Gippsland Rail Trail, extending the Great Southern Rail Trail westwards from Leongatha and eastwards in partnership with Wellington Shire, and plans to link the Latrobe Valley with shared pathways. Expansion of the Two Towns Trail continues to be considered.</p> <p>The longer distance 'spines' tend to be providing for regional and domestic use and with some further services, development and businesses taking up the potential they offer, may grow significantly into the future.</p> <p>Many of the existing trails link existing product and services such as small towns, wineries and food and historical features of Gippsland.</p>	<p>A strong base for growth and good Council support for maintaining and growing the network where feasible and viable.</p>

2.5 Planning context

A wide variety of State policy, legislation, strategy, planning and programs intersect with the development, management, maintenance and planning of trails in Gippsland and Victoria. The section below provides a brief summary of both relevant legislation and plans that contribute to the development of this Gippsland Tracks and Rails Feasibility Study report.

A review of the relevant partner agency plans and policies can be viewed in Appendix B.

Legislation

The *Local Government Act 1989* and associated Regulations provide the authority for Local Government in Victoria to operate. It also defines the functions and purposes of local government. Within this context, LGAs can undertake planning, provide services and administer businesses in line with the provisions of other Acts in Victoria.

The *National Parks Act 1975* provides for the management of the State's National Parks and various classes of reserves. The Act and its Regulations prescribe the permitted use and regulation of activity in Parks, ensuring the protection of individual park values while providing for safe and enjoyable use.

The *Forests Act 1958* sets the management framework for the State Forest management in Gippsland. The Act includes firefighting and fire management guidance and for recreation activities as well as commercial management of forests.

The *Crown Land (Reserves) Act 1978* and the *Land Act 1958* provide the legislative framework for the management of Crown Land in Victoria. Specifically, they provide for regulations governing use and the provision to create Committee of Management, relevant to Councils for managing rail trails and other areas of Crown Land for recreation or tourism.

The *Aboriginal Heritage Act 2006* provides for the protection of Aboriginal Heritage sites of significance in Victoria, as well as the establishment of the Victorian Aboriginal Heritage Council to provide a State-wide voice to Aboriginal people and provide advice to the Minister.

Various other Acts and Regulations apply to the running of businesses and use of Crown Lands.

Parks Victoria manages the Commercial Tour Operator Program for all the public land in Victoria in a bid to streamline the administration and regulation of tour operators, and to encourage the appropriate use of public land.

Plans

A hierarchy of plans apply to the tracks and trails feasibility study. These include State-wide, regional and LGA plans, as well as management plans for parcels of land.

Relevant plans include:

Tourism Plans

This includes the Gippsland Destination Management Plan (finalised in August 2019) to guide the growth of the industry in Gippsland, including how it is positioned, managed, marketed, and development of projects aligned to the target markets that will support growth in visitation and more broadly the regional economy.

Economic Development Plans

All Council partners in the region have, in one form or another, developed an Economic Development Strategy or plan. In some cases, they are aligned to an overarching Council area plan setting the broader community vision for the LGA. We note in our review of the plans that there are no real conflicting policies between the partners, and in general they support the objectives of growing trail-based tourism and regional economic benefits as well as benefits for communities including commuting, health and connectivity.

Trail and Path Strategies

All Council partners have some form of trail or path strategy. In most cases the objectives are more aligned to the development of community activation and community connectedness. Many provide for the economic benefit of trails and a healthy lifestyle for their residents and visitors.

In a similar way to the economic development plans, the trail plans and strategies are generally aligned in their principles, directions and intent. Differing approaches to achieving objectives are not considered material to this study.

Land Management Plans

National Parks and significant reserves have a plan of management. Many are several years old and may contain policies, actions and provisions that may act to restrict trail-based tourism, while others remain silent on trail development. Relatively new plans exist for the Alpine National Park and the Gunaikurnai jointly managed parks and reserves.

The Gunaikurnai and Victorian Government Joint Management Plan was approved in July 2018. The plan covers the joint management of 10 of Gippsland's important parks and reserves. The plan provides for strategies and actions to deliver the objectives which include management of country, and developing appropriate nature-based tourism industries.

Mount Baw Baw Alpine Resort has a variety of plans and strategies aimed at managing the underlying Crown Land and at improving the visitor economy outcomes. It is governed by the Southern Alpine Resort Management Board which contains an economic development function in part aimed at developing 'green season' activity.

DELWP manages the State Forest in Gippsland. A recently published DRAFT Central Gippsland Public Land Strategy provides strategic direction for the use and management of Central Gippsland Forests and crown lands. It proposes several 'game changing' projects which align to two of the hero sites of Gippsland at Mount Baw Baw and Walhalla.

State-wide Strategies

A number of relevant strategies and plans exist at a State-wide level. Of relevance despite its age is the Victorian Tracks and Trails strategy that provides for a range of relevant directions including a trails hierarchy.

3 Visitor economy overview

This section provides an overview of the visitor economy specifically as it relates to Victoria, Gippsland and tracks and trails.

3.1 Gippsland compared to Regional Victoria

When compared with the rest of regional Victoria, Gippsland has experienced strong growth in the number of domestic visitors traveling to the region in recent years. However, the average overnight spend for domestic visitors to Gippsland is lower (\$106) than the average for regional Victoria (\$139) and the average overnight spend of international visitors to Gippsland is only marginally lower (\$68) when compared to an average of \$71 for regional Victoria.¹²

Summary for Gippsland tourism data¹³

- Greater Gippsland receives a 12.4% share of the regional Victorian market for visitors (International overnight, Domestic overnight and Domestic daytrip)
- Most visitors to the region are day trippers (60%), followed by domestic overnight visitors (39%). International visitors represent 1% of visitors to the region
- Most visitors to the region are from Victoria
- International visitors stay longer in the region three times longer in the region compared to domestic visitors
- Domestic overnight expenditure in Gippsland is estimated \$106 per night and \$296 per visitor
- Daytrip visitors spend an around \$89 on their trip
- International overnight expenditure is estimated at \$68 per night and \$562 per visit
- The primary purpose of visits to Gippsland is to holiday. Notably the region has a high number of people visiting friends and relatives and this number has grown considerably over the last few years
- Latrobe receives the greatest share of business visitors and those travelling to visit friends and relatives in the region
- Most visitors to the region are over 55 and this market has experienced high growth over the past few years. When the 50-54 age group is added to the 55+ market, nearly half of Gippsland's market is represented by the over 50+ market
- Active families are an important market for the region especially in summer school holidays
- March is traditionally the high season with September and June being traditionally low seasons in the region
- Social activities, outdoor nature and active sports, dominate the reasons why people travel to the Greater Gippsland region
- The Chinese market has grown significantly over the last few years
- Most visitors stay with friends and relatives while in the region.¹⁴

¹² www.business.vic.gov.au/tourism National Visitor Survey Results YE March 2019 - note that Bass Coast is normally excluded from the Gippsland Region. For the purposes of comparison, Bass Coast has been included and is known as Greater Gippsland

¹³ Destination Management Plan for Gippsland (2019).

¹⁴ Sourced from: Travel to the Greater Gippsland region and its Sub-Regions - International Visitors Survey and National Visitors Survey, 2018 and Year Ending March 2019 TRA; Tourism's Economic Contribution to Great Gippsland in 2016-17

A breakdown of visitation per Gippsland sub-region can be viewed in Appendix E.

Summary of visitor segments for Gippsland

A snapshot¹⁵ from Tourism Research Australia provides the following breakdown in visitor segments.

Table 2. Domestic day visitors to Gippsland:

REASON FOR TRAVEL	LIFECYCLE GROUP	ACTIVITIES UNDERTAKEN
<ul style="list-style-type: none"> – 50.8% holiday – 30.3% visiting friends and relatives 	<ul style="list-style-type: none"> – 52.0% older persons – 26.8% families – 11.6% midlife – 9.8% young 	<ul style="list-style-type: none"> – 26.7% undertake outdoor/nature activity – 13.3% undertake active outdoor/sports

Table 3. Domestic intrastate overnight visitors to Gippsland:

REASON FOR TRAVEL	LIFECYCLE GROUP	ACTIVITIES UNDERTAKEN
<ul style="list-style-type: none"> – 57.7% holiday – 30.8% visiting friends and relatives 	<ul style="list-style-type: none"> – 36.9% older persons – 32.5% families – 18.5% midlife – 12.1% young 	<ul style="list-style-type: none"> – 51.4% undertake outdoor/nature activity – 34.6% undertake active outdoor/sports

Table 4. Domestic interstate overnight visitors to Gippsland:

REASON FOR TRAVEL	LIFECYCLE GROUP	ACTIVITIES UNDERTAKEN
<ul style="list-style-type: none"> – 53.4% holiday – 39.7% visiting friends and relatives 	<ul style="list-style-type: none"> – 51.9% older persons – 28.5% families – 14.9% midlife – 4.6% young 	<ul style="list-style-type: none"> – 39.1% undertake outdoor/nature activity – 18.7% undertake active outdoor/sports

¹⁵ Destination Gippsland, Gippsland Destination Management Plan, Working Draft 05, Appendix B, TRA (2018a & 2018b)

Trail related insights from Gippsland visitation

- Gippsland has 12.3% share of regional visitor economy (-0.2%)
- East Gippsland, Baw Baw, South Gippsland and Wonthaggi/Inverloch all experienced growth in visitor numbers
- Only East Gippsland and Wonthaggi/Inverloch reported growth in visitor nights indicating the continued tendency for day visits to the region
- 55+ represents 37% of the market, with a continued 5% growth in this age group over the past 3 years. When you add in 50-54 age group to the 55+, nearly half the market is represented by the 50+ market (46% combined), which will need to be a consideration with regards to future trail experiences, accessibility and comfort facilities
- The even spread across the rest of the demographics (15-49) would suggest that the active family market is also an important market for the region, especially in summer school holidays (combined 46% noting that children under 15 have not been represented in visitor analysis data)
- The March quarter is a seasonal high with September and June quarters being seasonal lows indicating that there is spare servicing capacity in these periods
- The LGAs closer to Melbourne have a higher percentage of day visitors
- The VFR is a huge component of the market with 35.4% of all overnight visitors staying with friends and relatives. This has grown by an average of 9% over the last 3 years.





Wilson's Prom

4 Trail trends

4.1 Overview

The development of, and demand for trails has increased globally, along with the trend for visitors to have experience-based holidays or breaks. A world-wide trend is for visitors to now seek more authentic and immersive ways to experience places and connect with the people who live there.

Providing a well-planned and thoughtfully constructed track or trail is essential to ensuring use is undertaken in a way that protects natural and cultural values, is environmentally and socially sustainable over the long-term, and offers a fun and enjoyable experience.

At the time the 2014 Tracks and Trails Strategy for Victoria was published, there were 2,000-plus¹⁶ trails listed showcasing Victoria's natural assets across an extensive network. This combined with the State's diverse and accessible landscapes, provides an ideal platform from which to build stronger and more sustainable trail-based destinations¹⁷.

Within Victoria, Parks Victoria manages 50% of recreational trails; the Department of Environment Land Water and Planning (DELWP) manages 35% of the network; and Local Government and Committees of Management manage 15% of the trail network.¹⁸

In Victoria, there is limited trail-specific research, and an inventory of all track and trails across the State is not stored and maintained by a central designated organisation. Instead, there are a range of sources available independently through which information can be obtained regarding trail locations, lengths, classifications and maps.

¹⁶ Victoria's Trails Strategy 2014-2024. Victorian Government

¹⁷ Victoria's Trails Strategy 2014-2024. Victorian Government

¹⁸ Victoria's Trails Strategy 2014-2024. Victorian Government

An understanding of the current tracks and trails supply in Gippsland was established drawing primarily on information obtained through desktop research.

The Victoria Tracks and Trails Strategy proposed a hierarchy of trails for Victoria. That hierarchy had few Victorian Trails that offer a truly 'hero' product. The map of Victoria's international, national and state significant trails from that strategy can be found in Appendix C.

4.2 Who uses trails?

Trails can cater for tourism (domestic and international travellers seeking nature-based experiences) and events attracting participants and accompanying friends/family. They also provide an outlet for residents to get outside and participate in physical activity contributing to public health, wellbeing, community and social interaction and a better liveability of a place. Part of the appeal of trails is that they mostly do not have costs or membership fees. More often than not, there is also an opportunity to provide interpretation and education in areas of natural, cultural or historical value along the trail.

The desire to experience more of a destination at a relaxed and unhurried pace is more important than ever. Advancing technologies, busy lives and time-starved people often translates to travellers opting for "slow travel". That is, they want to travel less and see more, rather than packing in as many places to visit in a short space of time as they can.¹⁹

As trails can be broken into smaller and more manageable sections to complete, this can also encourage visitors to stop, stay, spend and return.

Regional Victoria has strong positioning as a destination for spa and wellness, food and wine, touring and cycling and golf, based on a diverse range of private and public regional products and services that help drive visitation and spend.²⁰

Wellness is a 'hook' in travel marketing as travellers seek out a healthier, more active holiday. The well-known destination of Boulder in Colorado, USA has reported that 'there are more people on our trails than ever before'.²¹ Participation in sport or physical recreation offers many benefits, ranging from simple enjoyment to improved health and the opportunity for social interaction.²²

Many community groups and businesses are now recognising that their local trail is a substantial piece of infrastructure that they can extract more benefit from. Nowhere is this more evident than in Victoria, where rail trails have the longest history.²³ There are currently more than 100 rail trails across Australia with Victoria hosting the most at 39.²⁴

4.3 Different types of trail experiences

The experiences offered to trail users will inform the type of access, materials, trail width, design and grading. The overall trail experience will need to be carefully packaged with trail and user type at the front of mind. This includes facilities, signage, products and services and value-add activities. It is likely that there won't only be one type of user on the trails and it is important to

cater for the needs of multiple user groups and user capacity where appropriate.

Trails can be single-use (one activity only e.g. walking) or shared use. It is important to carefully design trails that are shared use to ensure safety and visitor enjoyment without creating conflict between users.

¹⁹ www.worldexpeditions.com/2019-adventure-travel-trends

²⁰ Victorian Visitor Economy Strategy July 2016







²¹ Megatrends defining travel in 2019. Skift

²² ABS Australian Social Trends June 2011 – Sport and physical recreation

²³ Rail Trail Connections Quarterly Publication – Spring 2017 – Volume 24 Issue 1. Rail Trails Australia

²⁴ News Article. Published 14 August 2018. www.bicyclenetwork.com.au/newsroom/2018/08/14/brisbane-valley-rail-trail/

Summary of different types of trail experiences

 <p>Walking</p>	<p>Walking / Hiking varies from a leisurely stroll to a more intense and strenuous hike through rugged terrain. Walking can be done for commuting or exercising with the dog in urban areas or in national parks and reserves even offering an overnight experience. Walkers undertaking a more remote activity are generally looking to immerse in nature or challenge themselves on an adventure hike.</p>
 <p>Running</p>	<p>As with walking, runners can use a range of trails types in urban and hard settings to more remote and wild settings running through challenging terrain. Trail running continues to grow in popularity with new emerging trail running events occurring internationally. Trail running adventures can also include orienteering and rogaining challenges.</p>
 <p>Cycling</p>	<p>Cycle users may use urban trails for commuting however, may also enjoy longer cycle trails for short breaks and weekends, independently or with family and friends. There are also cycle tourists (domestic and international) who travel from place to place with their bicycle to better explore a region.</p>
 <p>Mountain Biking</p>	<p>Mountain Biking as with walkers, mountain biking applies to a range of users from beginners and family groups, to more adventurous cross-country and downhill riders. Mountain biking may be done for leisure locally or also attract major international competitions and visitors.</p>
 <p>Horse Riding</p>	<p>Horse Riding users can also be categorised into short recreational riders, often undertaking a few hours ride on a weekend; endurance riders who participate in riding competitions and may use trails for training purposes; and long-distance riders who are enjoying an overnight experience or longer journey on horseback.</p>
 <p>Water Trails</p>	<p>Water trails can be used by kayakers, snorkellers, scuba divers and canoeists. The trail may be purely for the water-based activity or paired with on land walking and riding trail experiences. Water trails may include boat ramps and remote campsites accessible by water only. When planning for water trails, consideration also needs to be given to the types of facilities and services these users may require such as secure car parking, signage and safety provisions.</p>

4.4 Sports, recreation and nature-based tourism experiences

Trails aren't just about user activities, the purpose of trail experiences is different for each user, from ensuring a healthy and active lifestyle, holiday immersion or dedicated competitive sports.

Sports and recreation

Of the Australian population aged 15 years and over, an estimated 60% (11.1 million people) reported that they had participated in sport and physical recreation at least once during the 12 months prior to the interview conducted in 2013–14.²⁵

Of all sports or physical recreation activities, walking for exercise had the highest level of participation (23%). Swimming (7.4%), cycling (6.5%) and jogging or running (6.5%) were the only other activities that were participated in by more than one in twenty Australians.²⁶

Nature-based tourism

Around 46 million nature-based outdoor activities occurred in Victoria in 2015, including around 36 million nature-based walking, running, cycling and swimming activities in Victorian Parks.²⁷

22% of all visitors to regional Victoria participated in a nature-based experience (including both domestic and international overnight visitors, as well as domestic daytrip visitors).²⁸

Many nature-based outdoor activities support regional economies by shifting expenditure from urban to regional towns and cities and rural areas.²⁹

²⁵ ABS, 4177.0 - Participation in Sport and Physical Recreation, Australia, 2013-14. Latest Issue Released at 11:30am (Canberra time) 18/02/2015

²⁶ ABS Australian Social Trends June 2011 – Sport and physical recreation

²⁷ A Marsden Jacob Report. Victoria's nature-based outdoor economy. Outdoors Victoria & Sport and Recreation Victoria. Report Issued: 27.1.2016

²⁸ Tourism Events and Visitor Economy (TEVE) Research Unit Factsheet, January 2019. Visitors to Victoria – Experience Overview (Results for the year ending September 2018)

²⁹ A Marsden Jacob Report. Victoria's nature-based outdoor economy. Outdoors Victoria & Sport and Recreation Victoria. Report Issued: 27.1.2016

\$265 million was the estimated avoided cost to the Victorian healthcare system attributable to nature-based outdoor activities in 2015.³⁰

Walking and hiking

Walking for exercise is the most popular sport or activity which Australians regularly participate in. Nearly half of adult Australians, or 47.9%, regularly go for a vigorous stroll.³¹

Hiking and rainforest walks undertaken by international visitors to Australia increased by 7% to 1.9 million³² in the year ending September 2018.

Further demonstrating the popularity of walking as a recreational activity, Bushwalking Victoria, representing all bushwalkers and bushwalking clubs in Victoria, has over 60 affiliated clubs. Collectively, they represent 8,000 members and 250,000 bushwalkers who actively engaged in outdoor recreation.³³

Cycling

In the year ending September 2018, the number of international visitors to Australia who participated in cycling increased 12% to reach 495,000.³⁴

Shared paths are the most common form of off-road cycling facility in Australia.³⁵

While over a third of Victorians have cycled in the last year, most of them did so for recreational purposes rather than for transport.³⁶

The popularity of electronic bikes, or e-bikes, is growing rapidly. An e-bike allows people of various

³⁰ A Marsden Jacob Report. Victoria's nature-based outdoor economy. Outdoors Victoria & Sport and Recreation Victoria. Report Issued: 27.1.2016

³¹ Roy Morgan Research www.roymorgan.com/findings/7592-australian-sports-participation-rates-among-children-and-adults-december-2017-201805110755

³² TRA International Visitors in Australia – Year ending September 2018

³³ <https://bushwalkingvictoria.org.au/about-us>

³⁴ TRA International Visitors in Australia – Year ending September 2018

³⁵ Victoria Walks (2015). Shared paths – the issues, Melbourne, Victoria Walks

³⁶ Victorian Cycling Strategy 2018-2028. Transport for Victoria

fitness levels to cycle together, taking on greater distances and inclines with ease.³⁷

Quipmo is potentially the next trend in the sharing economy that will give Australians access to bicycles and other sporting equipment anywhere at any time. It is a peer-to-peer gear rental marketplace that will give people access to all kinds of bikes and accessories wherever they are to help them see the sights and live like locals. The concept has the potential to make bike riding easier for people all around Australia and further align Australia's cycling community with tourism.³⁸

In neighbouring New Zealand, there is evidence to suggest that cycle visitors stay longer. Visitors that participate in cycling spend 33 nights compared to all holiday visitors who stay 16 nights.³⁹ On average, cycling tourists also spend more on their visit when compared to all visitors and this pattern has continued throughout recent years.^{40 41}

Mountain biking

Mountain biking continues to grow as one of the fastest and most popular family friendly lifestyle activities in Australia. This is highlighted by the number of people riding trails across Australia every weekend, both before and after work.⁴²

Membership, affiliations and participation numbers have increased on the previous year with financial members of Mountain Bike Australia increasing by 13.7% to over 15,000. With the inclusion of past members and those that had purchased a day licence, MTBA's reach is currently over 70,000 individuals.⁴³

Mountain bike trails created or ridden on by national park visitors that are not part of the authorised mountain bike trail network are

sometimes closed and rehabilitated by park managers to protect public safety, mitigate visitor risk and protect environmental and cultural heritage values.

4.5 The economic benefit of trails

Economic benefits resulting from trail-related tourism have been demonstrated globally.

The Otago Central Rail Trail, the classic Great Ride and model for the New Zealand Cycle Trail, is well known for its success in rejuvenating the economy of the area through which it passes. Development of a wide range of products, attractions, accommodation and services for trail users has provided substantial increases to both visitation and the economy. In 2014-15 it was estimated that the trail received 12,000 to 15,000 multi-day users and 50,000 day users. The economic impact of the trail on the Otago region economy in 2014-15 was estimated as \$6.9 million in direct expenditure and total expenditure of \$10.4 million; total GDP impact of \$5.3 million; 81 direct full-time equivalent jobs and 21.4 indirect jobs.⁴⁴

In 2013 a report evaluating the New Zealand Cycle Trail estimated that cycle trail visitors on the Queenstown Trails contributed \$3.7 million in direct expenditure to the region between December 2012 and March 2013⁴⁵. A further report in 2016 estimated that international visitors to the Queenstown Trails (about 46% of total trail users) spent \$219.42 per day in the region.⁴⁶

The Bibbulmun Track is a 1,000 km trail in the south west of Western Australia offering a range of low key accessible, semi-remote and backcountry walking experiences either with packs or utilising accommodation in nearby towns. About 300,000 visitor days are spent on the Track annually, half of

³⁷ <https://worldexpeditions.com/2019-adventure-travel-trends>

³⁸ Bicycle Network Media Release 11 April 2018
<https://www.bicyclenetwork.com.au/newsroom/2018/04/11/quipmo-the-next-big-roller-in-the-sharing-economy/>

³⁹ <https://www.tourismnewzealand.com/markets-stats/sectors/special-interest/>

⁴⁰ <https://www.tourismnewzealand.com/media/1764/cycling-tourism-profile.pdf>

⁴¹ <https://www.tourismnewzealand.com/markets-stats/sectors/special-interest/cycling-and-mountain-biking/>

⁴² Mountain Bike Australia Annual Report 2018

⁴³ Mountain Bike Australia Annual Report 2018

⁴⁴ Central Otago District Council (May 2015), *Central Otago Rail Trail User Survey 2014-15*

⁴⁵ Ministry of Business, Innovation & Employment (2013). *Nga Haerenga – The New Zealand Cycle Trail Evaluation Report*

⁴⁶ Ministry of Business, Innovation & Employment (2016). *Nga Haerenga – The New Zealand Cycle Trail Evaluation Report 2016*

which are thought to be day walks⁴⁷. Walks on the track are popular with local and regional residents with an estimated 7% of users bona fide visitors (domestic and international). In 2014-15 it was estimated that an average of AUD\$30.95 and AUD\$45.09 per day was spent by day-use and overnight walkers respectively. Overall Bibbulmun Track walkers were estimated to contribute AUD\$13.1 million in direct expenditure to the areas around the track⁴⁸

Several case studies are presented later in this report that also showcase the regional and economic benefits of trails and of creating trail-based destinations. These are listed in Appendix D.

4.6 Trail markets and their preferences

Each of the trail markets (users) has a preferred approach to the experience they are seeking. By way of example, hikers ideally have trail heads with car parks, and information. They prefer not to walk on '4 WD Tracks' although in many cases these are the best options available.

A summary of the markets and their preferences is provided in Appendix E. The preferences have been developed based on the market knowledge, research (some of which is included in this document) and competitor destination analysis.



⁴⁷ Bibbulmun Track Foundation (2016), *Bibbulmun Track Annual Report 2015-2016*

⁴⁸ M Hughes, A Smith & M Tuffin (2015), *Bibbulmun Track User Survey Report 2014-15 - A report for the Bibbulmun Track*

Foundation and Department of Parks and Wildlife, Western Australia. Murdoch University



Tarra Bulga – Swing Bridge

5 Developing a world-class trail destination

A world class trails destination contains not only a series of world class trails developed to meet the needs of the identified markets, and that showcases the landscape and culture of the area, it also has a range of trail related services to help support the experience of the users. This applies to both local community users as well as visitors to the area.

By way of example, Three Capes Trail in Tasmania is not only a great trail through an outstanding landscape, it also offers trail users a complete experience. Not all trails need to offer the same experience, and this will in part depend on the intended users and level of service planned for trail. This study provides a framework that helps delineate intended markets and the needs of the trails specifically for Gippsland.

The following elements influence the trail destination in the marketplace and combine to also provide a way in which we can identify future needs of the region to help it develop its positioning the trails market, and the services and products it offers its residents and communities for outdoor active recreation.

5.1 Diversity of trails

Whether or not a destination offers a significant diversity of trails depends on its positioning and target markets. In the case of Gippsland, with a broad market and trail offering, a diversity of trails would be required.

A diversity of trails can be achieved in a number of ways. These may include offering trails to different and particular trail markets such as walking, hiking, multi-use, cycling and mountain biking. As well as different types of trails, they should also be offered to people with different fitness, skill levels and equipment. This may include degree of difficulty in use, length of trail, the number of points at which people can stop for refreshments or rests, or technical equipment requirements.

Mountain biking destinations that offer a variety of trails that may include cross country, downhill, and flow, as well as a variety of trail difficulty and lengths.

Queenstown (New Zealand)

owes part of its success as a trails destination to its wide range of walking, tramping, cycling and mountain biking trails that are easily accessible from the town and trail heads close by the town centre.

North-East Victoria

recognised as a trails destination now attracting a wide range of visitors for the trails it offers, and the support services including food and beverage that exist. The area has strong rail trail products, mountain bike tracks, walks and hikes as well as wonderful environment in which the trails sit.

5.2 Icon trails and supporting trails

Great trails destinations are very likely to have drawcard trails that provide the ‘hook’ to bring people into the region to experience a trails-based holiday. While the icon trail is important, it is also important to have a variety of supporting trails in the area to keep people in the region as long as possible (increased length of stay generally equates to increased yield), and to develop repeat visitation to the area.

The supporting trails will generally be aligned to the product strength of the region. For example, a destination with a hero mountain bike trail will generally have a number of mountain bike trails designed for similar markets, but of varying length and degree of difficulty etc.

Other types of trail may also be provided to deliver a comprehensive trail offering for other members in a group that may chose the visit.

The Tasman Peninsula (Tasmania) offers one of the widest ranges of walking tracks in Australia, with easy to difficult walks showcasing the area's distinctive, rugged sea cliffs, areas of rainforest, coastal heathland and convict heritage. The Three Capes Track is a 4 day/3 night, 46-kilometre journey that showcases the area's main features using purpose-built cabin accommodation. The Track is limited to 48 walkers a day. While the Three Capes Track serves to build the area's reputation as a walking destination, there are numerous other quality trails for visitors who seek a different experience.

5.3 Concentration of trail opportunities

Transport between trails can be a barrier for visitors seeking to have a multi-day trail experience in a region. Ideally the trails will be close to a trail head or area that provides accommodation and a service hub.

In the absence of the trails being located in a close area, strong transport connections are important to enable visitors to enjoy the area without travelling large distances to begin their experiences.

Yarra Ranges Council

(Victoria) are currently in the planning stages of developing Warburton as a world class trails destination. The destination will be based on a series of mountain bike trails and hubs all descending into Warburton. In addition, the area has great walking tracks and road cycling opportunities. Trail based businesses will be able to develop and grown based on the concentration of visitors in the valley and town.

5.4 High quality infrastructure

Trails will ideally be designed to be sustainable environmentally and will fit into the landscape in which they sit. Modern trail construction methods and new trail building guidelines (such as the MTBA guidelines⁴⁹) all promote good design with a strong emphasis on sustainability and user experience.

Importantly, trail design and infrastructure should be fit for purpose. Supporting infrastructure includes trail heads, toilets, information, car parks etc. For example, wilderness trails need significantly less infrastructure than high volume short walking tracks on the Princes Highway in East Gippsland.

Trails and infrastructure should be designed and managed to be safe for the proposed uses, including shared use trails. There should be clear, accessible information (on signs and online sources) on orientation and wayfinding, trail standards, difficulty ratings, appropriate user behaviour and journey length.

Makera Peak, Wellington, New Zealand

is a purpose-built mountain bike area. Trail design and construction aims to be high class and local clubs plant several trees on the site for every metre of track constructed. The trail head has bike facilities including tools and a comprehensive map of the area. Trails standards are clearly shown giving users a clear expectation of difficulty and experience.



⁴⁹ Mountain Bike Australia Trail – Australian Mountain Bike Trail Guidelines

5.5 Accessibility

Trails need to be accessible to user markets. For example, there is little point constructing a high-quality day walk trail with no access to day user markets. Transport and access need to be aligned to the markets using the trail. Considerations include:

- Is their suitable road access to the trail head?
- Can users use public transport to reach the trail of trail head?
- Is there the ability to have luggage transfers from the trail head to overnight destinations?
- Can bikes be shuttled uphill via cars of lifting?
- Is the area all ability accessible to encourage community use across all user groups?

West Highland Way

in the Scottish High Country is a well-known 5 to 8 day walk stretching from just north of Glasgow to Fort William. Companies specialise in transferring walkers' luggage between rest stops on the trail, and public transport enables people to catch a train from Fort William back to Glasgow. The transport connections enable international travellers to easily book and walk the trail.



5.6 Distinctive experiences

Trails destinations attracting strong growth and market position offer something distinctive that positions them uniquely in the market. Generally, that point of difference will include:

- Showcasing the natural or cultural landscape in which the trails sit, and enable the users to have a memorable experience
- Supporting infrastructure and services adding to the overall experience – including accommodation, and food and beverage
- Events and other activities
- Story-telling and local interaction including interpretation exists and is well presented.

5.7 Attractive natural and cultural settings

The setting in which the trail is located is vitally important to attracting visitors. Trail destinations use hero marketing shots of trail that showcase the area. This includes 'blue bird' days in alpine areas, coastal environments on still sunny days, and forests and waterfalls.

Trails based on cultural elements including Aboriginal culture are also important.

Yosemite National Park and Half Dome

are famous the world over for spectacular views and scenery. The Yosemite Valley is visited by approximately 4 million people per annum, and has generated a strong visitor economy in the region, yet very few people venture beyond the valley floor into the strong trail offering including the John Muir Trail.

5.8 Quality pre-trip information

Visitors more and more are researching their trip based on on-line content. Quality pre-trip information, including maps for trails is required to provide prospective visitors with the information they need to make a decision on the trail destination they will visit. A 'one stop shop' is ideal for visitors who can research accommodation transport, maps, etc. Other sites can then be used for verification.

Otago Central Rail Trail

(www.otagoentrail.co.nz) provides comprehensive information about the trail and the region, equipment requirements, transport services, bike hire, tours, accommodation, food and wine, attractions and events. Itineraries are provided for trail trips of various lengths.



5.9 Range of quality support services

Successful trail destinations provide the range of trail users with the services they need to access and enjoy trails. They assist in providing a seamless experience where the logistics of accessing trails, transporting people and equipment, and finding a place to stay are easily handled. The support services need to recognise the special needs of trail visitors. It is becoming more prevalent for trail destinations to run walker or bike friendly schemes where service and accommodation providers offer products and packages that cater for needs such as secure bike and equipment storage, clothes and equipment washing, packed lunches, opening hours convenient to trail users. Many of the European walks and rides fit this category.

Typical trail destination support services include:

- people, equipment and luggage transport to and from trailheads and accommodation
- a range of guided and self-guided trail tours
- equipment, bike hire, repair and retail for hiking, and other user needs including bridle equipment
- car rental services that facilitate carrying of equipment and bikes
- long stay car parking at or near trailheads
- a range of trail-friendly accommodation that caters for walkers and riders.

Italy Bike Hotels

(www.italybikehotels.com) is a consortium of 70 hotels which provide quality-services according to agreed criteria to cyclists visiting different parts of Italy. They cover the different cycling clientele – road cyclists, mountain bikers, cycle tourists and sport cyclists. The fulfilment of the criteria in each hotel is audited independently. The core facilities provided by participating hotels include:

- Safe and secure bike storage
- An equipped bike workshop and repair services
- Cycling guides
- Information on trail routes etc
- Laundry services
- Balanced meals including packaged lunches
- Some offering massage and medical support facilities.

5.10 Support businesses in food and beverage etc

Trail destinations attract visitors for the trail offering and the range of important support services that can make the trail experience a highlight. Many trail destinations have great cafes on the trail, showcase regional and local produce, have strong beverage offerings including cellar doors, distilleries and provide the services in an accessible way.

Other businesses include the need for bike and walking equipment shops, repair services, trail transport etc. For some destinations, equipment rental is an important service when catering for international visitors and domestic markets that are some distance away.

5.11 Strong positioning and marketing

Strong marketing is required to ensure a trails destination cuts through in what is becoming a more and more crowded market-place. Each destination must ensure it positions itself well and aligns its core strengths and experiences to the market and promotes it accordingly.

Consistent application of a brand across the destination and the partners involved is also critical to avoid mixed signals and inconsistent messaging.

Strong planning and collaboration between partners, land managers, businesses and the tourism industry more generally is essential to getting the marketing and positioning delivered well.

5.12 Strong governance

Good governance provides for well made decisions, based on evidence and made in a collaborative way aligned to a strong sense of vision and long-term planning. An effective governance structure and mechanism is important for each destination, and it is important that the governance model is fit for purpose for that area. Elements of a good governance model include:

- The partners and operators have a clear sense of a vision for the destination
- The partners have a clear understanding of their roles and accountabilities and work together in that framework

- Having teams with the right skills and experience to drive outcomes
- Having access to the necessary financial, human and support resources they need to develop the destination.

Many trail destinations in Australia struggle to gain the necessary funding for ongoing maintenance. This is in part due to many trails being on land run by National Parks Services, and Forest Services whose business models generally do not have fee for services where the fees directly hypothecate back into a destination's maintenance.

New models are being developed across Australia to help deliver strong financial security for trails developments. This includes the proposed new Red Centre Adventure Ride in the Northern Territory and the Yarra Ranges Mountain Bike Destination.

Queenstown Trails Trust

is an organisation with a purpose to raise funds for the development and growth of the trails network in Queenstown NZ (www.queenstowntrail.co.nz). It has a Board of Trustees that includes independent businesspeople and land managers. They have been very successful in helping to deliver and grow over 120 km's of trails on mixed land tenures around Queenstown and the Wakatipu.

5.13 Community engagement

Strong community engagement with local communities about plans, issues and opportunities helps ensure that the destination's experiences are delivered by managers, businesses and community alike. It also helps ensure that local needs are considered in the trail management and development.

Strong engagement can occur in a variety of ways. Trusts and Associations are one way of developing a more formal approach to engagement. Most local government areas (LGAs) have strong channels for engagement including the 'Your Say' page or through the Victorian State Government's Engage Victoria.

The Bibbulmun Track Foundation

(www.bibbulmuntrack.org.au) has encouraged growth of a supportive track community that extends through user groups, local community, the general public, and the government and private sectors. This has resulted in a strong sense of stewardship and support for the Bibbulmun Track.

The Foundation operates volunteer programs, training programs, information sessions and sponsorship partnerships that enable residents, visitors and businesses to participate in management and development of the Track.

The Eyes on the Ground Maintenance Program enables teams of volunteers adopt a section of track, carry out a maintenance and reporting schedule and attend annual Maintenance Field Days. An incentives program offers rewards (such as gift vouchers, national park passes) linked to the number of hours volunteered in a year.

Partnerships with local businesses are used to sponsor specific programs, activities and track work (for which each sponsor is acknowledged) – such as the volunteer maintenance program, first aid training, incentive prizes for volunteers.

5.14 An events calendar with strong events

A strong events calendar can help bring a trail destination to life, particularly in shoulder and off seasons for visitors. It also assists in providing trail related businesses in the area to have an income source and provide some business certainty.





6 Current trail network & destination

6.1 Gippsland trail areas

The trail offering throughout Gippsland is extensive and formed mostly on a legacy of uses across much of the various tenures of public land in the region. Generations of local users and communities have used trails for recreation, community connectedness and enterprise. Many of the trails in the alpine and foothill areas of Gippsland were formed over a century ago by cattlemen, gold miners, traders and timber industry businesses.

The Gippsland Aboriginal community has valued the landscape as a living natural and cultural region for thousands of years. Family and clan connections were often maintained by trails traditionally used for access and for food collection as well as trading. Many of the best places for modern recreation were similarly used by Aboriginal people for recreational and living for the same reasons as they are used today – they are nice places to visit, have access to views and water and connect to other areas naturally.

With the advent of specialised equipment such as mountain bikes, and improved comfort and functionality of walking/hiking gear, a greater demand for trail-based access has emerged over the past decade and world-wide trends around being active in nature indicate that it will continue to develop.

The current Gippsland trail offering includes areas for general trail use, community trails in local areas for health and wellbeing activities, specialised mountain biking areas, longer distance hikes, short walks and also bridle trails for horse riding. Many trails offer multiple user types the opportunity to use the network. This includes rail trails and other trail spines.

This report has taken the view that 'trail areas' are the appropriate level of description of the current offer. A table (contained as Appendix F) provides details of the main trail areas in Gippsland, their main markets and land managers, and a brief description of the area.

6.2 Strengths, weaknesses, opportunities and threats of Gippsland's trail network

A SWOT analysis (strengths, weaknesses, opportunities and threats) undertaken for the current trails offering in Gippsland is presented in the following infographic.



6.3 Gippsland's Trail Performance Against the World Class Criteria

This section outlines Gippsland's performance against those criteria and provides comments on not only the current gaps and issues, but also on the opportunities presented.




Emoji's are used to provide a guide to current performance against the criteria:





😊 Performs well | 😐 Average performance with room to improve |




😞 Poor performance with significant improvement required


Table 5. Assessment of Gippsland's trails and trail experiences against criteria for a strong trail destination

CRITERIA	RANKING	GAPS AND ISSUES	OPPORTUNITIES
Diversity of Trail Types	😊	<ul style="list-style-type: none"> Diversity in some parts of the network is poor, including 'top end' trail experiences designed to bring in visitors to Gippsland. Mountain bike parks tend to have limited diversity – i.e. few strong descent trails with many cross-country trails in forest. Gippsland is a large region and the diversity of trail types may be hundreds of kilometres away from other trail types – meaning significant travel. Shorter walks in the alpine areas and foothills may require some distance to travel. While predominantly out of scope for this study, many Councils acknowledge that trail connectivity for communities may be poor in some areas Some potentially strong trail experiences may be similar across the region. 	<ul style="list-style-type: none"> The main opportunity would be to improve the availability of serviced walks in Gippsland which for the most part is missing. These would include the Coastal Wilderness Walk and a potentially a re-imagined Wilsons Promontory National Park walk. The opportunity to develop more easily accessible walks in the foothills of the Alps would also provide an opportunity that may not be available to broader markets. Implementation and development of the Omeo Mountain Bike Destination will provide a strong downhill mountain bike trail offering for Gippsland. Implementation of the Haunted Hills Mtn Bike Park including the proposal for a Central Gippsland Mountain Bike Hub and the development of the concept for an epic flow trail from Mount Baw Baw to the Latrobe Valley would provide a diversity of trails not currently present in Gippsland. Investigate the feasibility of a potential mountain bike park in Bass Coast to add diversity to the region's trail mix geographically.
Signature and Supporting Trails	😞	<ul style="list-style-type: none"> Gippsland appears to have strong local and regional supporting trails, but very few signature or icon trails. Wilson's Promontory Circuit Trail is a significant trail based hiking experience that has great strengths that could be updated. The Australian Alps Walking Track is well known as one of Australia's premier trails, but is mostly remote, self-reliant and under-utilised. Some sections of the trail receive good use. A section of the trail between Walhalla and Baw Baw is promoted as a fully serviced option. The Wilderness Coast Walk between Marlo and Mallacoota is potentially an icon trail but is in places poorly marked, underutilised and the support facilities including water, 	<ul style="list-style-type: none"> With the lack of signature products in the region across the main trail types, the opportunity for Gippsland is to create a small number of signature trails showcasing the outstanding landscape and history of the region. The significant opportunities for Signature Trails in Gippsland are: Develop a market led 2 to 4-day coastal walking experience between Cape Conran and Point Hicks, offering serviced walking opportunities with the potential for off park accommodation. Revitalise the Wilsons Promontory Circuit Walking Track offer including consideration of improved and serviced accommodation options. Developing Omeo as a mountain bike destination inclusive of potential wilderness and strong downhill rides. Developing the potential epic ride from Mount Baw Baw to the Latrobe Valley and linking the Haunted Hills MTB Park into the network

CRITERIA	RANKING	GAPS AND ISSUES	OPPORTUNITIES
		<ul style="list-style-type: none"> camping sites and accessibility are lacking. A strong mountain bike network exists as a regional trail offering – mainly to communities with some visitor economy activity. Missing a signature park or trail to drive visitation and offer a marketing edge. The Bass Coast has outstanding coastlines but without a signature trails product. Existing rail trails offer a strong product, but they are not linked and, in most cases, have large expanses between products and services. It is noted that the Hotham to Falls Creek Walk is under planning and development consideration and while outside the Gippsland footprint, is likely to be a strong product. 	<ul style="list-style-type: none"> Selectively create a ‘Gippsland Trail’ that provides a consistent high class multi use ‘rail trail’ from western Gippsland and eastern Melbourne, through to Sale linking the highest priority experiences along the way Following the government’s announcement on the George Bass Coastal Walk – develop a ‘European’ style coastal walk accessing the villages of the Bass Coast for accommodation, services, transport etc Re-imagine the Australian Alps Walking Track including the section from Mount St Gwinear to Walhalla and develop niche products and services along selected parts of the trail Develop the concept of a multi-use Aquatic Trail on the Gippsland Lakes
Concentration of Trails		<ul style="list-style-type: none"> Parts of Gippsland have a good concentration of trails and visitors can stay in one place to enjoy several days of trail use. Elsewhere there is a poor connectivity and poor concentration of trails. The Gippsland Rail Trails are poorly connected around the region and offer disparate experiences to different standards. 	<ul style="list-style-type: none"> Connectivity of the rail trail and ‘multi use’ trail network would improve usage from visitors and communities. Continue to develop trail ‘clusters’ where market demand continues to grow. This includes day walk hubs on the Princes Highway east, West Gippsland day visitor markets and south Gippsland day visitor markets. Develop the concept of a Central Gippsland Mountain Bike Hub with Haunted Hills and other trail parks, and investigate the possibility of an epic trail that links Mount Baw Baw trails and into the Latrobe Valley trail network.
High Quality Infrastructure		<ul style="list-style-type: none"> Trail infrastructure varies by trail type and across the region. Infrastructure is mostly older and while serviceable, can be prone to poor cleanliness and erosion. Some new infrastructure exists in areas where investment has occurred in the past 10 years. Some trail standards differ across the region for similar type trails and similar users. 	<ul style="list-style-type: none"> Trail head facilities and visitor information can be improved as a general requirement across the network noting some newer trails have high quality infrastructure. Align the standards for similar trails across Gippsland. Develop innovative models to assist land and trail manager with trail maintenance burdens. Consider closing or rehabilitating a number of lower priority trails to enable a focus on the trails with the highest visitor economy and community outcomes. Consider a design or ‘brand’ for ‘Gippsland Trails’ to help with market penetration and an understanding of what Gippsland can offer to trail users. Ensure new mountain bike developments are built on best practice guidelines including the new MTBA trail design guidelines released in 2019.
Accessibility		<ul style="list-style-type: none"> Gippsland public transport is poor and generally not bike friendly with 	<ul style="list-style-type: none"> Work with Public Transport Victoria to develop a bike friendly transport service on buses and trains

CRITERIA	RANKING	GAPS AND ISSUES	OPPORTUNITIES
		<p>the exception of the ability to ride one way on the Gippsland Plains Rail Trail.</p> <ul style="list-style-type: none"> Many of Gippsland's trails are not accessible by all ability standards. 	<p>on selected routes where market demand exists for such services.</p> <ul style="list-style-type: none"> Use strong design guidelines to develop all ability trail and trail infrastructure where appropriate and as a general rule.
Distinctive Experiences	<p> for walking</p> <p> for mtn biking</p>	<ul style="list-style-type: none"> Gippsland's mountain bike trails are generally of a regional level and while locally built, owned and managed, are not signature trails offering something unique to external markets. Many of Gippsland's walking trails are unique and while many are a legacy of previous land use or simply historical trading or recreational routes – showcase the environment of Gippsland. The rail trail and multi-use trails are variable and have sections that are uniquely Gippsland while other sections are variable and contain long sections of forest or farmland riding with little variation or product along the longer sections. 	<ul style="list-style-type: none"> The signature trails described in this table above would significantly alter the experience mix in Gippsland providing a series of world class trails. New trails developed throughout the life of this study should undergo market testing and demand modelling to ensure they are designed and built with the experience of the user and the target market. Gippsland's landscape strengths can be built into new trail experiences being developed (see signature trails above).
Attractive Natural or Cultural Context		<ul style="list-style-type: none"> Some of the new trail locations may be in National Parks which due to the sensitive nature of the land tenure may have extensive planning and community consultation processes to ensure protection of the important values within the parks. Aboriginal cultural heritage is paramount to the Aboriginal corporations and communities in the region and decisions on any impact or interpretation need to be made by those groups. 	<ul style="list-style-type: none"> Signature experiences to be constructed and developed in outstanding natural areas. Developing a strong partnership with the Aboriginal corporations and communities in Gippsland to bring culture alive on some rails – especially the opportunity on the Bataluk Trail.
Quality Pre-Trip Information		<ul style="list-style-type: none"> Parks Victoria and DELWP have information on walks and trails on their land within their corporate websites. DGL has a walk brochure. Individual Councils have their own information through printed material, and websites. There is no central source of information on Gippsland's trails easily accessible on one location for consumers and visitors. Few if any mobile digital information that enables story telling or support for experiences. User groups such as Gippsland Mountain Biking have websites with information on their own parks or activities. 	<ul style="list-style-type: none"> A single source website that had information on trail tourism in Gippsland – even with links back to detailed information on the individual land managers websites would be a significant improvement in visitors being able to find information. A regional brand for the significant trails and experiences in Gippsland might be a valuable tool to enable visitors to seek out relevant information more easily and to know what to expect within that branding. Updated 'Gippsland Trails' publication led by DGL Ltd would provide one printed source of information.

CRITERIA	RANKING	GAPS AND ISSUES	OPPORTUNITIES
		<ul style="list-style-type: none"> Other sites include Mt Baw Baw and LTO sites such as Walhalla and Mountain Rivers. 	
Range of Quality Support Services		<ul style="list-style-type: none"> Very few dedicated trail support services or business operating in Gippsland which can make it difficult to provide commissionable and pre-booked products. Small niche operators in Gippsland providing trail-based experiences struggle to get scale and market penetration. Transport options in Gippsland for riders and bikers are poor. 	<ul style="list-style-type: none"> With a lack of signature trails to bring scale and business certainty, Gippsland's trail services are focussed on local and regional users from within Gippsland and some inbound tourism. Developing the signature trails will provide opportunities for business and support service growth through increased visitors. Investigate a 'Gippsland Trail Friendly' accreditation scheme to help encourage and promote trail visitor friendly businesses.
Support Businesses in Food, Beverage etc		<ul style="list-style-type: none"> There are very few trail specific food and beverage businesses and products in Gippsland. Most of the services are in towns and can be some distance from trail-based experiences. Some farm gate and small producers are close to trails and in particular the Great Southern Rail Trail and could be aligned to trail visitors. 	<ul style="list-style-type: none"> A limited number of signature trails has limited the business opportunities for trail-based services – and that the development of the signature experiences will assist businesses with the ability to invest with more certainty on customers.
Strong Trail Destination Positioning and marketing		<ul style="list-style-type: none"> Some marketing has previously gone into the Walhalla to Mount Baw Baw section of the Australian Alps Walking Track – but generally there is no real region wide alignment of trail-based experiences. Gippsland MTB Club have some regional products on their website without it being a significant branding and positioning of the region. 	<ul style="list-style-type: none"> Gippsland has a new branding exercise under way as part of the Destination Management Plan. Market Gippsland Trails and experiences within that framework. Use the DMP positioning as it is well suited to trail tourism and experiences. Make DGL the regional owner of promoting Gippsland trails-based experiences and products. Develop a single portal/website for trails based information sitting under the new Gippsland Brand and aligned to the new positioning statement.
Effective Governance		<ul style="list-style-type: none"> Some collaboration occurs between land managers and Councils on a local level. Gippsland Local Government Network (GLGN) operates effectively at a broad policy level but may not trickle down to officer level for programs such as trail management and development. Some strong bi-lateral relationships. There's no formal mechanism to develop a regional approach to trail management and development. 	<ul style="list-style-type: none"> Develop and implement a region wide governance structure that enables strong regional decision making and align it to an existing forum such as GLGN. Hold regular regional trail forums and encourage private industry to seek out business opportunities on trails.
Community Engagement	 	<ul style="list-style-type: none"> Some strong community engagement occurs at local government level particularly around individual Council trail and pathway plans, and economic development plans. Land managers undertake community engagement and develop 	<ul style="list-style-type: none"> With the development of an agreed region wide governance mechanism, develop community information and consultation forums that do not override the need for Councils or land managers to undertake this – but that compliments the single agency approach in helping deliver the regional focus and brand with stakeholders.

CRITERIA	RANKING	GAPS AND ISSUES	OPPORTUNITIES
		stakeholder relationships with trail user groups around specific parks or trails.	
Events		<ul style="list-style-type: none"> Current trail-based events are mostly in mountain biking although trail running is growing in popularity and Mitchell River and a number of other locations hold strong events. Most events are competitive, with few community-based events, including visitor economy events such as trails, food and wine. 	<ul style="list-style-type: none"> Develop a regional umbrella event to celebrate Gippsland's trails, and align it to the Regional Events strategy recommended in the DMP.

6.4 Further analysis of supporting infrastructure for trails tourism

Accommodation

Gippsland features a range of accommodation types that would appeal to the variety of visitors who would use tracks and trails. This ranges from branded resorts, hotels and motel chain properties (e.g. Mercure, Best Western, Quest, RACV), independent hotels and motels, bed and breakfasts, farm-stays, holiday parks, caravan and camping sites and privately-owned holiday properties.

Having accommodation available close to, or nearby, the trail heads or along the tracks and trails means that there is potential to attract visitors to stay longer and spend more, positively contributing to the overall visitor economy of the region.

Services

Visitor information centres can be found in the following locations across the Gippsland region: Maffra, Foster, Metung, Bairnsdale, Lakes Entrance, Korumburra, Inverloch, Orbost, Omeo, Latrobe and Sale. Although information is available on various tracks and trails online and can be researched in advance before departure, some visitors utilise these visitor centres to collect local maps or ask for further information and advice on tracks and trails in the region. In addition, Parks Victoria offices also fulfil this function with materials and local knowledge.

Services such as bike repair and spare part shops, bike hire shops, shuttle bus transport, walking and trail gear stores, pubs, restaurants and cafes, supermarkets, general stores, public toilets, car parks, shelters, access to drinking water and picnic areas can all be utilised and accessed by tracks and

trail users. These all exist in varying supply and quality across the Gippsland region.

Having these service options available to tracks and trails users means that they are more likely to attract a wider variety of visitors, as the experience will be more appealing to those who wish to use tracks and trails recreationally, and may not possess all of the necessary equipment. In addition, access to the convenience of places to stop and eat and drink, means that a particular track or trail may become more appealing to those with a family, than perhaps a track or trail that does not offer this amenity. Having the ability to break longer tracks and trails into shorter sections, with accompanying infrastructure or amenities along the way for comfort stops, also allows users of varying ages and physical ability to be able to enjoy the experience.

Attractions

Many of the best-known attractions of the Gippsland region can be linked to tracks and trails, whether directly related or positioned nearby and considered a complementary experience. This includes experiences such as visiting the Phillip Island Nature Park, Wilsons Promontory National Park, and other attractions where tracks and trails support the enjoyment and experience provided by the product.

In addition to outdoor recreation, Gippsland offers a variety of non-commissionable and commissionable activities for residents and visitors.

There are a number of organised hiking and cycling tour opportunities, where operators offer multi-day itineraries that include accommodation, meals, transfers, on-ground transport and guides. For participants that do not require a fully guided experience, other options include self-guided tours, where elements such as bike hire, accommodation, luggage transfers and return transport are packaged together.

Events

Events are currently held along tracks and trails in the Gippsland region, which have the potential to attract not only the participants to the region, but their supporting family and friends as well (e.g. the Great East Rail Trail Ride is a fully-supported 3-day cycle event along the East Gippsland Rail Trail which has been held annually since 2014). Trail running events utilising tracks and trails are also held across Gippsland, including The Mitchell River Trail Run, which will be the hallmark event of a new trail running series to be held across the region⁵⁰ and Duncan's Run, an ultra-marathon event held in the trails of Gippsland's Tarra Bulga State Forest. Events more focused towards beginners, those looking to support a charity event or simply wanting to participate for fun could include The Baw Baw Trail Run Festival and Keeping Kids on Track Fun Run, which is held along the scenic Bass Coast Rail Trail.



⁵⁰ ⁵⁰ <https://www.trailrunninggippsland.com.au>

7 The future framework for trails in Gippsland

7.1 Vision

The development of the Gippsland Trail Network will be driven by the following vision for the region:

Gippsland will be recognised as a world-class trails destination offering a diversity of outstanding landscapes and experiences.



7.2 Principles for the network

By aligning principles, the framework and the goals to the vision, it will ensure that the network grows in a coordinated, planned, aligned and deliberate way maximising the returns to the community from the growth in the visitor economy driven by increased visitor numbers into Gippsland, and also from improved community outcomes such as health, connectivity and accessibility.

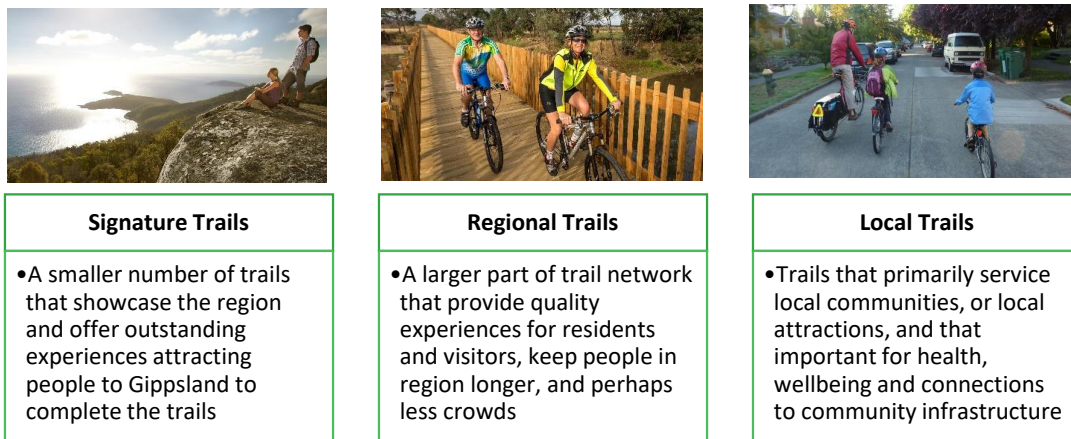
Guiding principles for Gippsland tracks and trails

1	<p>We offer diversity Gippsland offers a strong diversity of settings that the trail offer should capitalise on that</p>
2	<p>We pursue quality Gippsland has lots of trails, we aim to improve quality of trail and experiences</p>
3	<p>We have a market focus We continually look to what markets and people want and seek to adapt to its needs, and we take our product to market strategically</p>
4	<p>We seek sustainability We value long term environmental, social and cultural considerations</p>
5	<p>We seek community benefit We seek multiple community outcomes from trails including health and wellbeing, connections and economic opportunities</p>
6	<p>We work together We work across LGAs, State Government and users to deliver optimized regional outcomes through good governance and strong collaboration</p>
7	<p>We seek accessibility We actively deliver trails that connect communities and that are suitable for use by a range of users</p>
8	<p>We seek to resource trails We actively seek to deliver resources to trails to ensure experiences are high quality</p>
9	<p>We seek strong stewardship We work with the community and trail users to care for the trails and the environment</p>
10	<p>We seek strong economic outcomes We deliver opportunities for business, yield, economic outcomes and jobs</p>
11	<p>We showcase nature and culture Trails showcase Gippsland's natural and cultural assets</p>
12	<p>We work with other regional strategies and groups The DMP will provide direction for markets, projects etc.</p>

7.3 Framework

The trail network for the Gippsland region will be built around 3 trail classifications that form building blocks for managing, improving and marketing the network, meeting the needs of residents and visitors, and prioritising resources and investment.

Figure 4. Gippsland tracks and trails framework for the future



Signature trails

A small number of outstanding trails will be chosen as the region’s signature trail experiences and will have the highest priority for regional investment. These trail experiences will have strong marketability that can attract visitors and achieve recognition beyond the region. They will reflect the region’s strengths and key points of difference across the trails offering. They will also align to the positioning of the region and fill identified gaps in the trail offering that Gippsland has.

Signature trail criteria:

- The highest quality experiences in nature and culture
- One of the best trails of its type
- The highest quality infrastructure fit for purpose and sustainable
- Accessibility to target markets for Gippsland and for trail visitors
- Good information – from pre-trip to post trip follow up
- Sustainable in the environment and culturally
- Effective management and coordination including community
- Brand and reputation aligned as well as positioned in the market
- Provides (or has the potential to) for strong visitor number growth into Gippsland.

Regional trails

Regional trails are significant trails that form the core of the trail network and provide quality experiences for residents and visitors.

Regional trails support the region's positioning and its signature trails by offering a variety of other quality experiences, and have the potential to keep people in the region longer.

Regional trails will be prioritised for development based on their development needs and potential to contribute to the destination, and to opportunities for business growth based on the trail visitor numbers and yield.

Some regional trails may have the potential to evolve into signature trails. Decisions on conversion to signature trails should be made based on the criteria and with the appropriate decision-making governance framework applied.

Regional trail criteria:

- Attracts people from within and outside the region with good standard facilities and services
- Strong experience offering
- Quality infrastructure – fit for purpose
- Good accessibility for users
- Designed and managed to limit damage to the environment
- Effective management regime
- Could cope with some increase in use if required
- Provides a contribution to the visitor economy (or has the potential to) through increased visitor numbers, or increased length of time spent while in the region.

Local trails

Local trails primarily service a local community and provide facilities suited to local markets. Investment in local trails will be the responsibility of the relevant Council or trail (land) manager. Prioritisation for works, improvements and signage on these trails would continue with the managing authority.

A designation as a local trail does not imply it will receive less funding, or that it is less important to a local community. Importantly it continues to place the decisions for the management of trail at a local level so that issues and opportunities are addressed locally.



8 Enabling trail experiences

There are 6 core areas where coordinated actions are desirable to deliver a world-class regional trail network that grows visitor economy outcomes for Gippsland.

1. Effective coordination
 - arrangements to provide region-wide leadership and direction and assist collaboration and coordination
2. Consistent and collaborative planning
 - to provide consistent regional policies and approaches to trail use, design and construction standards and environmental sustainability
3. Delivering trail experiences
 - a consistent approach to trail classification, network development and service delivery
4. Sustainable management
 - maintenance and monitoring to ensure continued environmental and social sustainability
5. Supporting trail use and community involvement
 - including support for the work of volunteer trail groups and encouraging trail use through programs and events
6. Marketing and communication
 - effective ways to reach local and visitor trail markets.

8.1 Effective coordination

Gippsland has at least 10 agencies involved in direct management, development and maintenance of trails. This includes the 6 Local Government Areas, Parks Victoria, DELWP, Mount Baw Baw Alpine Resort, and Phillip Island Nature Park. This list excludes private businesses and committees of management operating within Gippsland.

To take an effective Gippsland wide view of trail development and management, effective coordination and governance is critical. Accordingly a set of principles is recommended. A trail coordination group will:

- respect the role the land manager or Council has in legislation and more broadly across Victoria
- respect the democratic processes that exist in Councils for the allocation of resources and priorities within LGAs
- seek to bring alignment to trail management priorities between partners
- encourage communication and sharing of information on trail trends, visitor data
- provide leadership and recommendations to agencies on a whole of Gippsland approach
- assist with the oversight of delivery of the feasibility study recommendations
- work with the regional tourism entity (DGL) on trail marketing.

Utilising an existing forum or means of coordination across Gippsland avoids the need to recreate another forum. Both the Gippsland Regional Partnership Forum and the Gippsland Local Government Network work as coordination forums for local government and State Government to determine priorities across the region.

The role of the forum is aimed at coordination and ensuring the region's organisations work collectively to pursue the recommendations in this plan. It is not designed to be a direct management authority for trails.

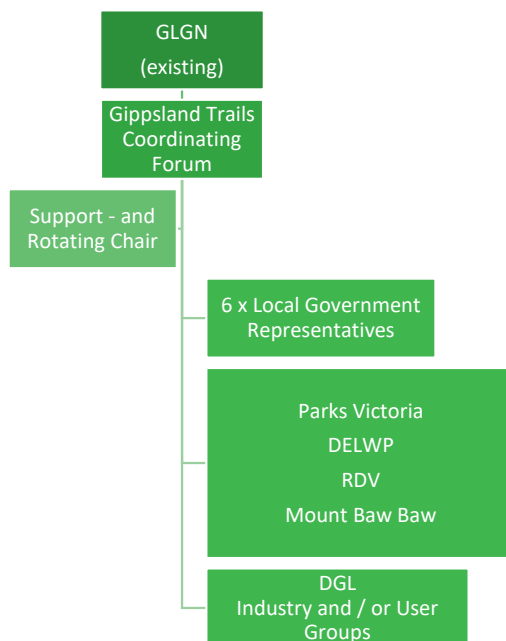
It is also noted that Parks Victoria and DELWP will retain the accountability they have for management planning, and aligning their approvals processes to legislation and State Government policy of the day.

It is proposed to add a trails forum into the GLGN group operating effectively as a subcommittee of GLGN as shown below.

The focus of the forum will be on the signature and regional trails, noting that any trails not in those classifications are designated local trails (from a visitor economy perspective) and fall outside the purview of the forum.

The creation of the Gippsland Trails Coordinating Forum will help provide collaborative leadership in the development of the region's Signature Trail experiences, and assist with the ongoing management and development of the Regional Trails.

Figure 5. The Proposed Gippsland Trails Coordinating Forum Structure and membership



Amending the Study and keeping it live

During the life of this study, it is anticipated that circumstances will change and changes to the proposed classification of trails may be desirable or needed. Given the range of partners, and the potential consequences for trails moving in and out of classification bands (particularly signature trails), a process of coordination and agreement is proposed within the framework of trail coordination proposed above. The following diagram provides the process for amending the classification of trails.

Figure 6. Trail classification review process

- **Proposal**
 - A proposal is developed to review the classification of a trail within the Gippsland Trails Feasibility Study
 - The proposer evaluates the trail against the criteria within the study and documents the reasons for the proposed change
 - The proposal is added to the agenda for the Gippsland Trails Coordinating Forum.
- **Review**
 - The Gippsland Regional Trails Coordinating Forum meets and considers the proposed change
 - Trails to become signature trails must have agreement of 2/3 rds of the forum members and be forwarded to GLGN for endorsement
 - Trails to become regional trails can be adopted at the coordinating forum.
- **Amendment**
 - Trails list is amended, and new classification adopted
 - Any public information is updated, and plan refreshed.

Table 6. Actions for effective coordination

ACTION	DESCRIPTION	PRIORITY
1.1	Formalise and create a Gippsland Trails Coordinating Forum (GTCF) under the auspices of the Gippsland Local Government Network.	Very High
1.2	Adopt a process and approach for GTCF to keep the trails feasibility refreshed and current including the way in which trails move between Signature, Regional and Local.	High
1.3	Consider developing an industry and stakeholder forum aligned to the GTCF to bring partners into a regional perspective on trails and assist with input into decision making.	Medium

8.2 Consistent and collaborative planning

The challenge for a regional approach to trail planning is that all Councils and State Government agencies have their own set of standards, plans and policies governing their approach. It is reasonable then not to seek to duplicate those, but work collaboratively on areas of divergence.

A review of the relevant policies, plans, studies and documents for all partner agencies and Departments was undertaken as part of this study. Appendix B provides a summary of those plans.

It should also be noted that the majority of Gippsland Councils have adopted the Infrastructure Design Manual (IDM)⁵¹ which also contains standards for a variety of unsealed trails that can apply to a number of applications recommended in this report.






⁵¹ Infrastructure Design Manual 2018 v5.2 – Local Government Design Association.

The adoption of trail standards across Gippsland should occur as follows.

Australian Walking Track Standards and Grading System

Grading systems for Trails are used to categorise the technical difficulty of the recreational trail, support trail planning and design and assist users in making informed decisions to partake activity on a trail that is suitable for their capabilities which fosters safe and enjoyable experiences.

Figure 7. Australian Walking Track Standards Grading System

	No bush walking experience required. Flat even surface with no steps or steep sections. Suitable for wheelchair users who have someone to assist them. Walks no greater than 5km.
	No bush walking experience required. The track is a hardened or compacted surface and may have a gentle hill section or sections and occasional steps. Walks no greater than 10km.
	Suitable for most ages and fitness levels. Some bush walking experience recommended. Tracks may have short steep hill sections a rough surface and many steps. Walks up to 20km.
	Bush walking experience recommended. Tracks may be long, rough and very steep. Directional signage may be limited.
	Very experienced bush walkers with specialised skills, including navigation and emergency first aid. Tracks are likely to be very rough very steep and unmarked. Walks may be more than 20km.

Cycling Standards

The Cycling Aspects of Austroads Guides (2014) provides information relevant for planning, design, construction and traffic management of cycle trails and associated facilities.

www.onlinepublications.austrroads.com.au/items/AP-G88-14

Rail Trail Standards

Rail trails are generally shared-use trails on old unused railway corridors. Rail Trails are becoming increasingly popular experiences especially for mountain biking, cycling and horse riding, traversing through natural landscapes, connecting people to communities and enjoying experiences such as food and wine enroute. Infrastructure requirements and maintenance is a major consideration in the feasibility planning process for rail trails, especially given many of the rail lines were decommissioned and consist of deteriorating infrastructure including bridges and trail surfaces. Rail Trails Australia provides information for the development of rail trails including feasibility studies and planning for infrastructure. Their guidelines provide an overview of both Australian and international rail trail case studies. www.railtrails.org.au/management-resources/rail-trail-establishment-guidelines






Mountain Bike (MTB) Trail Standards

The International Mountain Biking Association has established an international Trail Difficulty Rating System. Adapted from an international trail system for ski areas, the Rating System has also been applied to horse riding trails.

There are 2 trail rating systems for mountain biking:

- Trail Managers System - to ensure construction and management adhere to and measure against specified criteria
- Trail User System – this provides trail ratings to help users make decisions about which trails are suitable and appropriate for their skill level.

Figure 8. The Trail Difficulty Rating System includes 5 levels of difficulty - International Mountain Bike Trail Rating System

Very easy	
Easy	
Intermediate	
Difficult	
Extreme	

The ratings are determined by 4 measurable criteria:

- Tread width
- Tread surface
- Trail Grade
- Natural obstacles and technical trail features.

Code of Conduct for Users

Voluntary codes of conduct for trail users are commonplace and best applied when users are involved in the development and implementation of the codes.

A common code of conduct for trail use across Gippsland would be ideal binding users across the 6 local government areas as well as the State organisations. While some organisations already have codes, the difficulty of individual codes is that the user experiences across a region the scale of Gippsland provide for confusion in users of trail as they cross from jurisdiction to jurisdiction.

The adoption of a code of conduct based on the current codes in the market-place including those from member associations such as Mountain Bike Australia would be appropriate for Gippsland and best be coordinated through the GTCF.

Table 7. Actions for consistent and collaborative planning

ACTION	DESCRIPTION	PRIORITY
2.1	Formally adopt a consistent set of trail standards across the region, acknowledging that in most cases they may exist in one form or another. These standards should include the IMBA standards for mountain bike trails, the Australian Walking Tracks Standards Grading system and the guidelines recommended by Rail Trails Australia, acknowledging the infrastructure design manual in use by local government.	High
2.2	Develop a peer review and support system across Gippsland's Councils that helps Councils share and develop consistent interpretation of standards between each other's operations.	Medium
2.3	Use the trail standards commonly adopted across the region in all marketing and publicity for the region's trails to ensure a consistent visitor experience and planning capability for intending trail users.	High
2.4	On trail signage should reflect the adoption of the trail standards to help match skill levels, equipment levels and length of trail to users.	High

8.3 Delivering trail experiences

Section 8 of this study applies market-based logic to the development of a framework to enable prioritisation of the region's trails, and trail-based experiences. This section applies that framework to both the existing network and to the opportunities identified throughout this study, and in the brief. The simple premise is that investment in Signature Trails will provide the greatest increase in visitor numbers and will be prioritised over regional trails (from a visitor economy perspective), acknowledging that there will be local and community investment occur outside these guidelines.

The following tables and associated maps provide an analysis of the visitor experience and framework applied to the significant trails and trail hubs in Gippsland as follows:

- Signature Trails – Walks and Hikes
- Signature Trails and Hubs – Mountain Biking
- Signature Trails – Multi Use
- Regional Trails

Importantly, the trails proposed against each of the framework elements can be existing, or proposed, and with development works attached to them.

The trail maps directly align with each of the associated Signature Trail/Track tables, under the categories of Walk, Mountain bike and Multi use.

Table 8. Actions for Trail experiences

ACTION	DESCRIPTION	PRIORITY
3.1	Gippsland Trails Co-ordinating Forum adopts the proposed classification system for trails in Gippsland and recommends to GLGN and formally to State based agencies that it apply to trails in Gippsland for the purposes of coordinated planning, development, prioritisation of investment and other outcomes described in this study.	Very High
3.2	That the GTCF and GLGN as well as State based agencies adopt the proposed classification for each of Gippsland’s major trails/trail hubs proposed in this study as a starting point for future planning and resource allocation – noting the ability for trails to be moved between classification levels described in section 1.	Very High

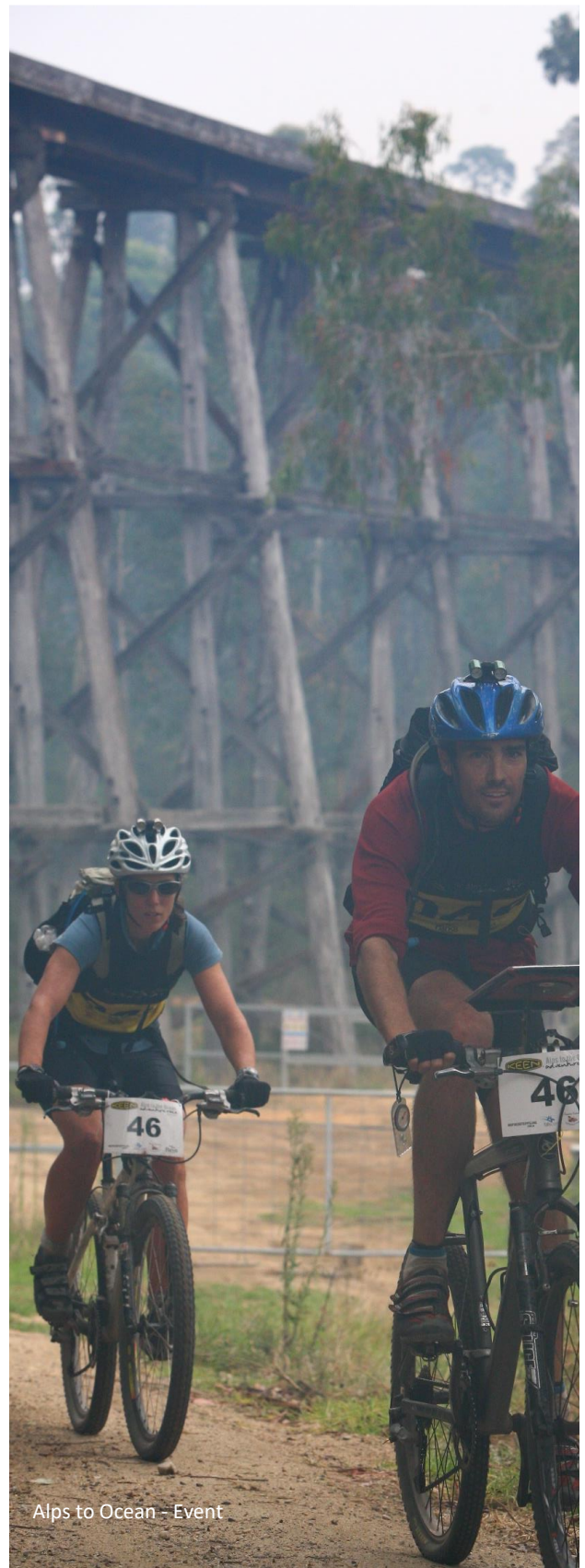
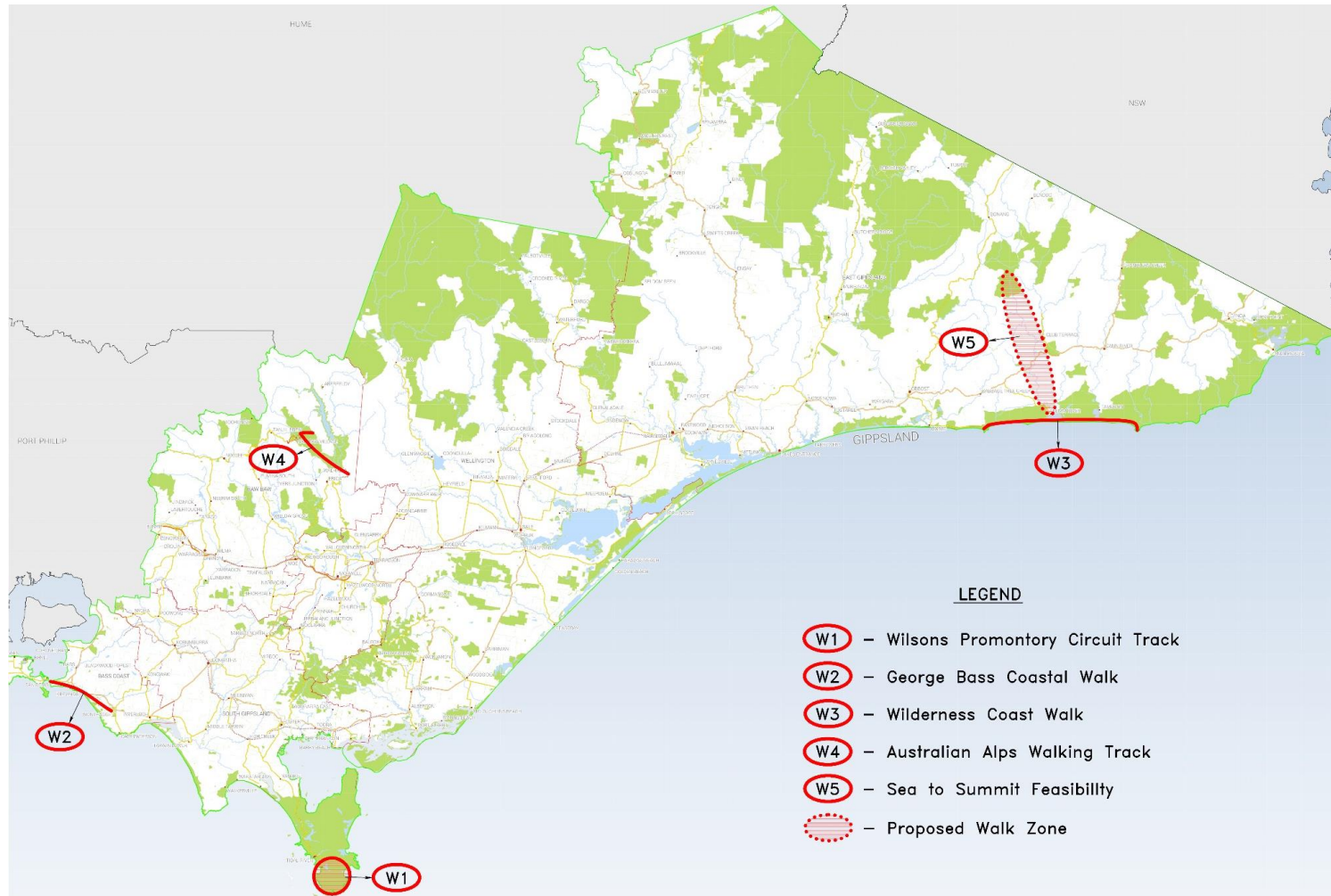


Table 9. Signature trails - walks

CLASSIFICATION	TRAIL OR TRAIL CLUSTER	WHY IT MEETS THE CRITERIA	WHAT NEEDS TO BE DONE
Signature Walk/Hike W1	Wilsons Promontory Circuit Walk	<ul style="list-style-type: none"> • Wilsons Promontory is an iconic national park destination in Victoria. The Prom Circuit Trail including access to the lighthouse is a well-known walk that is well managed, attracts high numbers of visitors including domestic and international markets, and offers outstanding natural and cultural experiences. • The length of the walk is appropriate for the market and governance of the walk is strong including booking options. • The lighthouse is a strong destination in its own right being the southernmost point of mainland Australia and with outstanding history and views over Bass Strait and the Islands south of the Prom. 	<ul style="list-style-type: none"> • The walk applies a single model to visitors, with tent-based camping and self-reliance required in all campsites. Toilets and some water are provided along with a ranger presence that both provides management as well as visitor information. • Existing and new markets seek alternative and additional models for walking and an opportunity to build the product into a multi-market walk exists that would grow the yield of the walk. This may include huts, glamping or commercial tent-based accommodation. In making this recommendation it is noted that the existing management plan may not allow for roofed accommodation and that a review may be required to facilitate a new model. Parks Victoria would own and undertake such a review. • A future strategy is recommended for Wilsons Promontory NP that includes the development of the Sanctuary concept as well as reviewing the model and options for walking the trail and considers a modernisation of the model for operating the walk.
Signature Walk/ Hike W2	The George Bass Coastal Walk (Currently Regional but proposed to be Signature)	<ul style="list-style-type: none"> • The George Bass Coastal Walk is a coastal walk that offers outstanding scenery on the coast close to the Melbourne and Phillip Island markets as well as the growing Bass Coast population. • Recent government announcements will transform the walk into a strong signature product that is extended, links to Phillip Island (potentially) and activates a number of strong commercial opportunities. • The model for the walk has the potential to offer a European style coastal walk similar in nature to the south west coastal path in the UK where villages and commercial opportunities are activated allowing different models for trail experiences (www.southwestcoastpath.org.au) . 	<p>While the walk is currently a strong regional product, implementing the range of outcomes funded recently by the Victorian Government will elevate the walk to Signature level.</p> <p>This includes:</p> <ul style="list-style-type: none"> • Extending the walk to San Remo and purchasing or leasing land, and extending the walk south eastwards close to Wonthaggi and potentially Inverloch • Developing an exciting European model activating accommodation opportunities in the Bass Coast villages • Constructing campgrounds and other trail infrastructure including interpretation, viewing platforms and toilets • Packaging and marketing the trail model and encouraging business development.

Signature Walk / Hike W3	The Wilderness Coast Walk (Currently Regional but proposed to be Signature)	<ul style="list-style-type: none"> The Wilderness Coast Walk between Marlo (or Cape Conran) and Mallacoota in East Gippsland has long been considered the fourth great walk of Victoria after the West Coast Walk, The Grampians Peak Trail and Falls to Hotham. The coast is stunning, intersecting with whale watching opportunities, the potential for wildlife viewing including seals, birds, native marsupials and birds of prey including sea eagles. Currently it is difficult to walk the entire trail as it requires self-reliance, river or estuary crossings, navigation, a longer period if doing the entire walk, long sections of beach walking, and transport connections that can be problematic. 	<ul style="list-style-type: none"> Undertake a master plan and updated feasibility for a 3 to 4 day walk from Cape Conran to Point Hicks as the 'upgraded and serviced' Wilderness Coast Walk. Consider accommodation options on or off park at Bemm River and Tamboon Inlet including walker lodges. Develop the walk-in conjunction with the Gippsland DMP recommendations to seal the Point Hicks Road, make Point Hicks the eastern trail head for the serviced walk and develop further accommodation options at Point Hicks. Test the market for opportunities for private and commercial style walking with the aim of this being able to be added to the Great Walks of Australia. Investigate Aboriginal sector involvement in the walk model.
Signature Walk /Hike W4	Australian Alps Walking Track	<ul style="list-style-type: none"> The Australian Alps Walking Track is a multi-State long distance walk that traverses Australia's most spectacular alpine scenery. The walk is well known with sections of the walk receiving high visitation and facilities in some areas being relatively good. Sections of the walk accessed from Gippsland include the Walhalla trail head and the areas north of Licola through to the Great Divide around Mount Howitt. 	<ul style="list-style-type: none"> Further develop the concept for the Walhalla to Baw Baw and St Gwinear car park as a 2 to 3-day high quality walk with supported services including glamping and guiding. Parks Victoria's current focus is on the Falls Creek to Mount Hotham section of the track. Investigate ways to grow the experience aligned to the developments on the Falls to Hotham section of the trail. Consider relaunching the trail with the ACT and NSW government's.
Signature Walk / Hike W5 (Feasibility)	Sea to Summit Walk	<ul style="list-style-type: none"> Undertaking the feasibility of this trail is an election commitment of the Victorian Government. It is unsure if it will meet the criteria for a Signature Trail Experience - however it has the potential to be a significant addition to the hiking / walking trails of Gippsland and is included in the Signature Trails given the investment and intent. 	<ul style="list-style-type: none"> Undertake the Feasibility Study. Aim for a very strong visitor experience.

Figure 9. Map of Gippsland signature walks / hikes

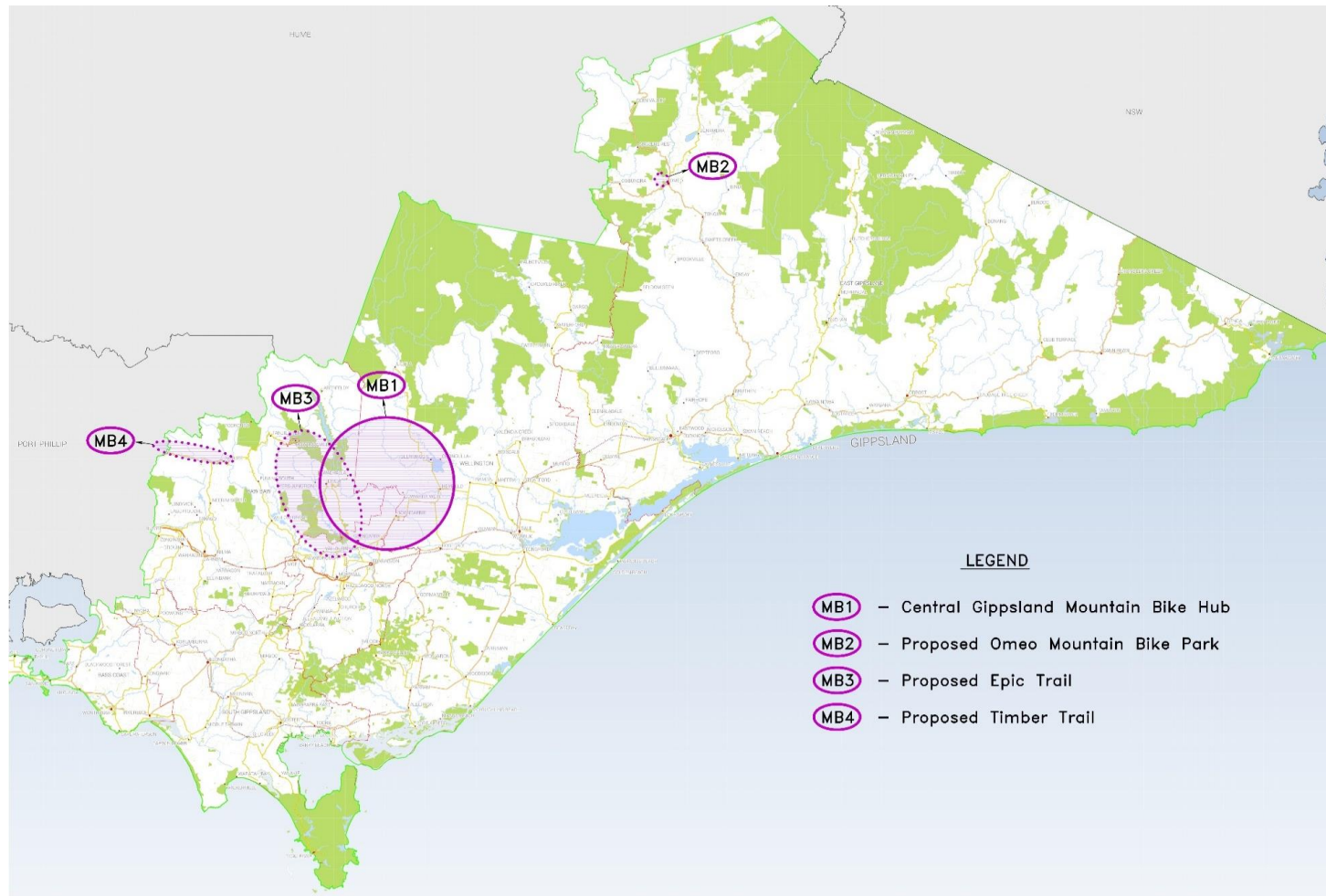


Signature Trails and Hubs – Mountain Biking

CLASSIFICATION	TRAIL OR TRAIL CLUSTER	WHY IT MEETS THE CRITERIA	WHAT NEEDS TO BE DONE
Signature Rides MB1	Central Gippsland Mountain Biking Hub	<ul style="list-style-type: none"> • Haunted Hills MTB Park (incorporating Stage 1 and further stages under planning) will become (at the time of this plan's development the most accessible and professionally built mountain bike park in Gippsland. • It will sit in an area where development of 'adventure' activities and events is being pursued (Latrobe City and the Latrobe Valley more generally) and has access to a large population. • The creation of a Central Gippsland mountain biking Hub that incorporates a number of smaller parks within half an hour's drive will create scale and diversity that offers significant visitor potential. • Many destinations are creating large parks, the concept of a series of smaller parks linked by branding, small distances apart, and common information, management and marketing will succeed in the marketplace. • Terrain is good and across all parks has a diversity of landscape and soil type. Haunted Hills MTB Park offers a unique setting in and close to an old working mine. 	<ul style="list-style-type: none"> • Complete the development of the Haunted Hills MTB Park (stage 1) and promote it as the best place to develop mountain bike skills in Gippsland. • Continue to pursue Haunted Hills stages 2 and beyond as the central core of the proposed Central Gippsland MTB Hub. • Brand and develop the surrounding parks in line with the Central Gippsland MTB Hub including Glengarry, Erica, Bores Hill, Avon Mt Hendrick and Maryvale Pines. • Ensure the non-trail facilities are to a standard that will help drive signature status. • Formalise Glengarry North and Avon Mt Hendrick that form part of the Central Gippsland MTB Hub with the relevant land managers. • Develop and market the concept of the Central Gippsland MTB Hub as a nationally significant MTB destination utilising the service infrastructure that exists in the Latrobe Valley more broadly.
Signature Ride MB2 (In development)	Omeo MTB Destination	<ul style="list-style-type: none"> • The planning, vision and directions underway for the proposed Omeo MTB Destination will help deliver a signature mountain biking product for Gippsland. • The terrain on offer in Omeo is significant providing up to 600 metres of vertical, as well as opportunities for wilderness and cross-country rides. 	<ul style="list-style-type: none"> • Continue to develop the concept and feasibility of the Omeo MTB Destination focusing on aligning market appeal with the unique features of Omeo which include the Oriental Claims, the view and the 'high-country' culture. • Develop partnerships with NE Victoria and align the products and marketing to 'Ride the High Country' as well as Gippsland – including with Mount Hotham and Dinner Plain. • Construct the park using MTBA guidelines and seek to create a world class unique trail offer above trying to create kilometres (quality and character over distance).

CLASSIFICATION	TRAIL OR TRAIL CLUSTER	WHY IT MEETS THE CRITERIA	WHAT NEEDS TO BE DONE
Signature Ride MB3 (Concept)	Epic Trail from Mount Baw Baw to the Latrobe Valley	<ul style="list-style-type: none"> The concept is to develop an epic trail from Baw Baw to the Latrobe Valley. This style of trail from the Baw Baw alpine Village to the Latrobe Valley – utilising exiting trails as far as possible, would provide Gippsland with a strong ‘hook’ that it does not currently possess. Mount Baw Baw has existing visitor facilities and would be an ideal trail head, also aligning to the desire to grow green season product. Haunted Hills MTB Park as part of the Central Gippsland Mtn Bike Hub would make an ideal southern trail head and conceptually the trail could also link into Erica and other opportunities. 	<ul style="list-style-type: none"> Feasibility including route analysis and experience development are required. Utilising existing tracks as far as possible would make the trail more feasible and remove statutory planning constraints in sensitive areas around Baw Baw NP. Ensure the trail meets IMBA guidelines for epic status and has a ‘marketability’ as well as being an exciting day ride opportunity.
Signature Ride MB4 (Concept)	Gippsland Timber Trail	<ul style="list-style-type: none"> The concept of Timber Trail in the foothills of the Baw Baw ranges aligned to the model in use in New Zealand has enormous market potential. Bespoke lodges, commercial services and access to the villages of the Baw Baw area, the trail would use existing forested trails including historical tram lines, trestle bridges and other forest industry living history. The trail has the potential to link into the Powelltown area and to the Yarra Ranges mountain bike trail developments that are occurring. 	<ul style="list-style-type: none"> Develop a trail feasibility based on the NZ Timber Trail model that seeks to provide an outstanding mountain biking experience coupled with bespoke commercial services including accommodation options and transport for bikes. (www.thetimberttrail.nz) Work in partnership with Yarra Ranges to investigate the option of the trail being linked with the Yarra Ranges MTB developments currently in planning and under construction.

Figure 10. Gippsland Signature mountain bike hubs and trails map



Signature Trails – Multi Use Trails

CLASSIFICATION	TRAIL OR TRAIL CLUSTER	WHY IT MEETS THE CRITERIA	WHAT NEEDS TO BE DONE
Signature Trail MU1 (In Development but existing in part)	The Gippsland Trail	<ul style="list-style-type: none"> The creation of a multipurpose trail that contains elements of many of the existing trails – but is marketed as the ‘Gippsland Trail’ or ‘The Great Gippsland Trail’ will provide a trail of State-wide significance. The trail will contain a number of ‘contained’ experiences that can be enjoyed in sections – and these sections will generally align with the existing trail network (i.e. Great Southern Rail Trail). The trail could have a number of longer routes promoted as ‘bike-packing’ routes that would enable riders the option of longer journeys through Gippsland. The trail can have transport connections providing easy access to train and transport services. 	<ul style="list-style-type: none"> Undertake feasibility assessments for linking a number of the rail trails that exist in Gippsland with a focus on developing experiences with product strengths, that showcase communities and landscapes and that offer a diverse and connected story of Gippsland. Focus on the linkages in the first instance in Bass Coast – developing the trail from Woolamai Racecourse northward and in South Gippsland both from Leongatha eastwards to Korumburra and Nyora, and in the Port Welshpool and Yarram areas. Investigate route options utilising existing trails and quiet roads as much as possible along the 90 Mile Beach from Port Welshpool to Sale and then into Loch Sport activating the villages and creating a ‘Bike Packing’ route aligned to the Gippsland Trail Develop a Gippsland Trail plan that sets a vision for connecting Gippsland’s main towns and experiences with bike friendly trails and off road (as far as possible) connections – including a marketing brand and commercial opportunities for bike and other businesses
Signature Trail MU2 (Feasibility)	Gippsland Lakes Aquatic Trail	<ul style="list-style-type: none"> The development of a Gippsland Lakes Aquatic Trail would have significant market appeal and significant commercial opportunities. The proposed Aquatic Trail could pick up some of the best elements of the landscape including waterborne kayaking or canoeing, cycling including trail riding through the Lakes National Park, walking and other activities. Accommodation options for a multiday market based tourism product could include existing options in villages or newer more modern options including houseboats or glamping. 	<ul style="list-style-type: none"> The concept of the Gippsland Lakes Aquatic Trail has been in existence for some time, but the concept remains an outstanding business opportunity best developed by private enterprise. A more detailed assessment of proposed routes and facilities is required prior to going to market. Work with existing operators and land managers to develop the feasibility and expression of interest process and put in the marketplace to determine the level of interest from investors.

Figure 11. Map of Signature Multi Use TRails



Regional Trails – Walking, Biking and Multi Use

CLASSIFICATION	TRAIL OR TRAIL CLUSTER	WHY IT MEETS THE CRITERIA	WHAT NEEDS TO BE DONE
Regional Trail 1. (Hub)	Wilson's Promontory short and day walks	<ul style="list-style-type: none"> A number of outstanding short and day walks exist within the Wilson's Promontory NP. Many of these are located in the under used northern sections of the park. The trails showcase the landscape and natural beauty of the national park and offer visitors a large range of choices depending on time available, fitness, experience preference (i.e. beaches, or climbs). 	<ul style="list-style-type: none"> Car parking is an issue at Wilson's Promontory NP, particularly in the summer and busy periods. The Gippsland DMP recommends a review for the national park to ensure visitor experiences, sanctuary style conservation outcomes and infrastructure requirements align. Consider further investment in infrastructure to support the short walks in the northern section of the national park including the dunes and the Vereker Lookout Trail.
Regional Trail 2. (With some investment)	East Gippsland Short Walks aligned to the Princes Highway East	<ul style="list-style-type: none"> The short walks of the East Gippsland component of the Sydney Melbourne Touring route are very important to keep visitors in east Gippsland, and offer accessible experiences for the tourers of the princes Highway. The trails include McKenzie River Rainforest Walk, Point Hicks Light station Walk, Thurra Dunes walk, Wingan Inlet Fly Cover walk, Genoa Peak, walks on the Mallacoota Foreshore and Frenches Narrows. The walks showcase the coastal and forest environment of East Gippsland. 	<ul style="list-style-type: none"> The walks all need some form of infrastructure improvement and general maintenance upgrades, in varying degrees. Common branding for pre-trip information, and signage as Gippsland's regional walks is important. Collaboration between the land managers to bring the trails to a similar standard for visitors so the visitor gets a similar experience across all trails.
Regional Trail 3. (With some investment)	West Gippsland Day Walks	<ul style="list-style-type: none"> The shorter walks of the West Gippsland Foothills predominantly within the Baw Baw Shire are important for the day markets coming out of Melbourne. They offer outstanding forest and history experiences that can be combine with other products and services including food and adventure. Trails will include Noojee Trestle Bridge, Toorong Falls, Poverty Point Bridge (Walhalla) and Walhalla Township Walks. 	<ul style="list-style-type: none"> Improved infrastructure and signage would add to the experience. This includes car parks, toilets, signs, trail head information. Common branding around Gippsland's walks both on site and in pre-trip information would add to the experience. Some investment is required in improving the presentation and feel of the products and ensuring they sit at a regional level. A well-developed set of walks would keep people in the region longer and potentially attract new visitors to the region.

CLASSIFICATION	TRAIL OR TRAIL CLUSTER	WHY IT MEETS THE CRITERIA	WHAT NEEDS TO BE DONE
Regional Trail 4. (With some investment)	Raymond Island Koala Trail	<ul style="list-style-type: none"> This walk is currently not well developed but the chance for international visitors to see koalas in the wild offers very significant potential, coupled with a village and ferry ride across the Strait to Raymond Island. The location also provides another option for touring visitors in Gippsland between the NSW coast and the option of travelling to south Gippsland or via Walhalla and the Baw Baw foothills. 	<ul style="list-style-type: none"> Work is required to have this walk fulfil its potential. Social media reports show that visitors have an outstanding experience viewing koalas in the wild. Developing a trail through forests, signs, viewing platforms, information and other infrastructure to support the experience would lift this to signature trail. Consider developing partnerships with university or the Melbourne Zoo (Healesville Sanctuary) to showcase native animals in native habitat.
Regional Trail 5. (Hub) Walk	Alpine NP Short Walks	<ul style="list-style-type: none"> A number of short walks accessing spectacular views, and landscapes, as well as culturally important sites offer visitors access to the Victorian Alpine environment. Trails include Guys Hut, Bryces Gorge, Mount Howitt day walk, several tracks in the Dargo area and 	<ul style="list-style-type: none"> Providing pre-trip information as part of a 'Gippsland Walks' or Gippsland Trails website to enable visitation. Provide interpretation where possible to help develop the experience for visitors. Gradually improve the infrastructure at sites including toilets, shelters, car parking, signs and trail marking. Work with VicRoads, Councils, Visitor Centres and other bodies to better promote the opportunities that exist.
Regional Trails 6. Walk	Errinundra Walks	<ul style="list-style-type: none"> Includes the Errinundra Board Walk Provides a show case of the tall forests of east Gippsland to visitors to the area. Relatively high-quality infrastructure 	<ul style="list-style-type: none"> Distance from many drives including the Sydney Melbourne Touring route makes these walks limited in their market appeal. Develop and implement 'Gippsland Walks' and include these opportunities in a revamped trail offering to the market.
Regional Trails 7. Walks	Snowy River NP Short Walks	<ul style="list-style-type: none"> The Snowy River is an iconic Australian brand that is widely known in the visitor economy, if not exactly where it is and what it is. The Snowy River NP has some outstanding short walks showcasing the landscape and gorges of the park. These include the Little River Gorge Lookout, and Tulloch Ard Gorge trail and lookout. 	<ul style="list-style-type: none"> As with other recommendation, increase the profile of the regional short walks through further and updated 'Gippsland Walks' branding and promotion. Continue to work with land managers to maintain and improve the services, infrastructure and overall presentation of the sites.

CLASSIFICATION	TRAIL OR TRAIL CLUSTER	WHY IT MEETS THE CRITERIA	WHAT NEEDS TO BE DONE
		<ul style="list-style-type: none"> The trails are well maintained and offer strong visitor experiences in locations that do not have a lot of other infrastructure to assist with visitor experiences. 	
Regional Trails 8. (Walk/Hike)	Tarli Karng	<ul style="list-style-type: none"> This trail is a popular trail and one of the destination walks in the Alpine NP. Recent fires have reduced the appeal of the walk. The area is important culturally to the Gunaikurnai Aboriginal people. The walk is suitable for self-reliant walkers for 2 to 3 days. 	<ul style="list-style-type: none"> The walking track requires maintenance in sections, particularly across the plains in the northern end and along sections of the trail on the Wellington River. Campsite development outside the immediate Lake enviros due to cultural sensitivities has occurred but the campsites offer little in the way of setting. Improvements to the car park and other areas from a presentation perspective would be appropriate.
Regional Trail 9. (Walk)	Sale Common and River walks	<ul style="list-style-type: none"> Sale Common is an area on the outskirts of Sale that offers a unique perspective on ephemeral wetlands and the birdlife that inhabits them. The trail is easily accessible and well signed and includes good infrastructure and signs. 	<ul style="list-style-type: none"> Further marketing and promotion of the wetlands walks both to residents and visitors to Sale. Some improvement in presentation and basic infrastructure including toilets.
Regional Trail 10. (Walk)	Tarra Bulga Short Walks	<ul style="list-style-type: none"> Tarra Bulga is a national park located centrally in Gippsland and offering tall mountain ash forests and good walks. The park is one of the 10 that is a Gunaikurnai Aboriginal native title park and presents future opportunities to explore Aboriginal culture. Several short walks offer a strong forest experience and an old visitor centre and picnic area exist. 	<ul style="list-style-type: none"> The opportunity to explore Aboriginal culture with the Gunaikurnai Land and Water Corporation has strong visitor appeal and will depend on their timing and desire to pursue this over other opportunities that they will pursue. A revitalised visitor precinct near the visitor centre and aligning the walking opportunities to that would add significant appeal. Promote the Tarra Valley . Continue to work with partners to promote this as part of Gippsland Walks.
Regional Trail 11.	Grand Strzelecki Track	<ul style="list-style-type: none"> A trail through the heart of the Strzelecki Ranges offering opportunities for overnight accommodation in the villages along the way. 	<ul style="list-style-type: none"> Sections of the trail are in need of some maintenance. Marketing of the trail and the experiences on offer could be improved.

CLASSIFICATION	TRAIL OR TRAIL CLUSTER	WHY IT MEETS THE CRITERIA	WHAT NEEDS TO BE DONE
		<ul style="list-style-type: none"> Strong community interest and volunteer support in the trail's management. 	<ul style="list-style-type: none"> Some of the more challenging components including creek crossings and steep slippery slopes could be improved for visitor comfort. Implementing a branding and signage program to promote the trail and its experiences would assist with its market knowledge.
Regional Trail 12. (Multi Use Trail)	Bicentennial National Trail	<ul style="list-style-type: none"> The Bicentennial National Trail is Australia's premier long distance multi use trail stretching from Cooktown in the north of QLD to Healesville in Victoria. A significant part of the trail is in Gippsland. The predominant users of the trail are horse riders but walkers also complete sections of the trail. The Trail is well known in trail markets, particularly in the horse riding sector. 	<ul style="list-style-type: none"> Continue to work with land managers and the not for profit organisation that runs the trail marketing, branding and marking to ensure the Gippsland section is open and well-marked.
Regional Trail Hub 13. (Mountain Biking)	Blores Hill MTB Park	<ul style="list-style-type: none"> Develop the park as a part of the Central Gippsland MTB Hub concept. <i>On its own – it sits as a Regional Trail – collectively with the other mountain bike hubs – it sits as Signature Trail.</i> A strong mountain biking area well known regionally for a series of good collection of well-made trails. Strong local management and ownership by Gippsland MTB Club. Over 30 kilometres of trail mostly intermediate and easy for a variety of trail users. Easy access to population centres in the Latrobe Valley. Close to camping areas. 	<ul style="list-style-type: none"> Further infrastructure on site is required to provide a better experience for users and family and friends. This includes shelter, toilets, parking etc. The length of trail in the park is limited by the terrain and size of the Regional Park in which they site but more trails would increase the appeal as markets seek over 50 to 60 km of trails in parks to attract significant out of region visitor numbers. Nearby Avon Henrick Scenic Natural Features Reserve is under consideration for additional trails, and if developed would add scale and enable facilities to be built and better utilised. Develop the branding and information aligning it to the Central Gippsland MTB Hub concept.
Regional Trail Hub 14.	Avon Hendrick Natural	<ul style="list-style-type: none"> Develop the park as a part of the Central Gippsland MTB hub concept. <i>On its own – it sits as a Regional</i> 	<ul style="list-style-type: none"> Work with the land manager to formalise an agreement for the development of 'official' trails in the reserve.

CLASSIFICATION	TRAIL OR TRAIL CLUSTER	WHY IT MEETS THE CRITERIA	WHAT NEEDS TO BE DONE
(Mountain Biking)	Features Reserve	<p><i>Trail – collectively with the other mountain bike hubs – it sits as Signature Trail.</i></p> <ul style="list-style-type: none"> The terrain and proximity to the Blores Hill park combine to offer potential for trail development. Existing trails formed through motor bike use are being used for mountain bike riding and could be formalised 	<ul style="list-style-type: none"> Develop the reserve as a ‘sister’ site to Blores Hill enabling the sharing of facilities as far as possible. Consider developing infrastructure to support the development of the regional parks concept. Develop the branding and information aligning it to the Central Gippsland MTB Hub concept.
Regional Trails Hub 15. (Mountain Biking)	Mount Taylor	<ul style="list-style-type: none"> A strong downhill riding park with good technical features and close to Bairnsdale and the regional population. Formalised trails and managed cooperatively with the land manager. 	<ul style="list-style-type: none"> The trail hub requires ongoing maintenance only. Continued work to promote this as art of Gippsland MTB offering in the market-place.
Regional Trails Hub 16. (Mountain Biking)	Erica	<ul style="list-style-type: none"> The park offers a strong mountain biking experience close to the Warragul and Melbourne markets. <i>On its own – it sits as a Regional Trail – collectively with the other mountain bike hubs – it sits as Signature Trail.</i> The park is currently being developed in partnership with the land manager. Continued trail development will occur over time. Close to the Latrobe Valley and in good terrain for MTB trails particularly more difficult trails. 	<ul style="list-style-type: none"> Continue to work with DELWP and the Gippsland MTB Club to develop the park. Ensure adequate trails facilities are considered and built as part of the development. Develop the branding and information aligning it to the Central Gippsland MTB Hub concept.
Regional Trails Hub 17. (Mountain Biking)	Cement Hill Foster	<ul style="list-style-type: none"> A good local and regional mountain bike trail and loop constructed well and close to Foster. While infrastructure at the park is not available, it is close to Foster and public amenities can be found there. A good trail offering for visitors to the region seeking to stay longer. 	<ul style="list-style-type: none"> Continue to maintain and manage the trails in partnership with the land manager. Promote as part of a Gippsland MTB offering to get some scale to the MTB trail product.
Regional Trails Hub 18.	Nowa Nowa	<ul style="list-style-type: none"> A good cross country offering on the edges of Nowa Nowa township. 	<ul style="list-style-type: none"> Continue to maintain the trails.

CLASSIFICATION	TRAIL OR TRAIL CLUSTER	WHY IT MEETS THE CRITERIA	WHAT NEEDS TO BE DONE
(Mountain Biking)		<ul style="list-style-type: none"> On the Princes Highway. Good local partnerships involved in the trails. 	<ul style="list-style-type: none"> Continue to promote as part of the Gippsland Trails offering for MTB riding.
Regional Trails Hub 19. (Mountain Biking)	Glengarry North	<ul style="list-style-type: none"> Has the potential to be a part of the Central Gippsland MTB Hub and be developed as a part of a larger collective riding experience. <i>On its own – it sits as a Regional Trail – collectively with the other mountain bike hubs – it sits as Signature Trail.</i> Currently has 18 km of trails with good terrain and in close proximity to the Latrobe Valley and Sale population centres. 	<ul style="list-style-type: none"> Formalise the trail network with the public land manager (DELWP). Develop the branding and information aligning it to the Central Gippsland MTB Hub concept.
Regional Trails Mtn Hub 20. (Mountain Biking)	Maryvale Pines	<ul style="list-style-type: none"> Has the potential to be a part of the Central Gippsland MTB Hub and be developed as a part of a larger collective riding experience. <i>On its own – it sits as a Regional Trail – collectively with the other mountain bike hubs – it sits as Signature Trail.</i> Close to Central Gippsland population centres and forms a part of the collective riding experience on offer. 	<ul style="list-style-type: none"> Formalise trails with the land manager. Has the potential to be a part of the Central Gippsland MTB Hub and be developed as a part of a larger collective riding experience.
Regional Trails Hub 21. (Mountain Biking)	Colquhoun Forest Park	<ul style="list-style-type: none"> A good trail mix in open forest close to the Lakes Entrance township. Just off the Princes Highway with easy access and parking. 	<ul style="list-style-type: none"> Continue to work with the land manager to develop and maintain the park. Continue to develop the park as appropriate with new trail experiences. Work across Gippsland to promote all the MTB parks as one offering.
Regional Trail 22.	Grand Ridge Rail Trail	<ul style="list-style-type: none"> Recent investment has provided a strong regional rail trail of approximately 13 kilometres from Mirboo North to Boolarra. 	<ul style="list-style-type: none"> Work in partnership with the other Councils of Gippsland to undertake a feasibility study into the development of a 'Gippsland Trail' that has strong linkages into the other rail trails and creates a spine trail providing strong marketability and offering large commercial opportunities for trail and off trail businesses including new Bike Packing Markets

CLASSIFICATION	TRAIL OR TRAIL CLUSTER	WHY IT MEETS THE CRITERIA	WHAT NEEDS TO BE DONE
			<ul style="list-style-type: none"> Continue to maintain and develop the local connectedness of the trail.
Regional Trail 23	Cape Woolamai	<ul style="list-style-type: none"> Phillip Island receives a very large number of visitors and this trail provides a strong experience to the Cape and offers strong coastal views. 	<ul style="list-style-type: none"> Continue to improve the visitor facilities in the area.
Regional Trail 24	Great Southern Rail Trail	<ul style="list-style-type: none"> A strong Rail Trail offering through the South Gippsland farming landscape and connecting villages with character and a strong arts and food culture. <i>On its own – it sits as a Regional Trail – collectively with the other trails that form the “Gippsland Trail” – it sits as Signature Trail.</i> South Gippsland has an outstanding natural and working landscape. 	<ul style="list-style-type: none"> Resurfacing of the original parts of the trail needs to occur in places to ensure a consistent experience for users. Extending the rail trail is currently underway in the south as a joint project with Wellington and South Gippsland Councils including accessing Port Albert as another feature of the trail. Extension of the Rail Trail westwards through Korumburra to Nyora would offer a strong addition to the trail picking up a number of towns and potential products. Work in partnership with the other Councils of Gippsland to undertake a feasibility study into the development of a ‘Gippsland Trail’ that has strong linkages into the other rail trails and creates a spine trail providing strong marketability and offering large commercial opportunities for trail and off trail businesses including new Bike Packing Markets.
Regional Trail 25	Gippsland Plains Rail Trail	<ul style="list-style-type: none"> The rail traverses pleasant landscapes and includes small towns along the way with regional character. <i>On its own – it sits as a Regional Trail – collectively with the other multi use trails – it sits as Signature Trail.</i> Options for train travel one way and riding on way exist with the terminus of the trail close to the Stratford Railway Station. 	<ul style="list-style-type: none"> The first priority must be to resolve on road sections of the trail where the rail trail does not formally exist. Ideally to build the marketability of the trail – link trail heads at either end to the Traralgon and Stratford train stations. Work in partnership with the other Councils of Gippsland to undertake a feasibility study into the development of a ‘Gippsland Trail’ that has strong linkages into the other rail trails and creates a spine trail providing strong marketability and offering large commercial opportunities for trail and off trail businesses including new Bike Packing Markets.

CLASSIFICATION	TRAIL OR TRAIL CLUSTER	WHY IT MEETS THE CRITERIA	WHAT NEEDS TO BE DONE
Regional Trail 26	East Gippsland Rail Trail including the Lakes Discovery Trail	<ul style="list-style-type: none"> The trail extends 94 km from Bairnsdale to Orbost with the Lakes Discovery Trail linking Lakes Entrance to the trail. <i>On its own – it sits as a Regional Trail – collectively with the other multi use trails – it sits as Signature Trail.</i> Strong product offering between Bairnsdale and Nowa Nowa but with long sections of forest between Nowa and Orbost. 	<ul style="list-style-type: none"> Resurface the sections of trail that are eroded or in need of significant maintenance. Develop the experiences on the trail as far as possible to grow the appeal of the trail to the widest possible market. Work in partnership with the other Councils of Gippsland to undertake a feasibility study into the development of a ‘Gippsland Trail’ that has strong linkages into the other rail trails and creates a spine trail providing strong marketability and offering large commercial opportunities for trail and off trail businesses including new Bike Packing Markets.
Regional Trail 27	Bass Coast Rail Trail	<ul style="list-style-type: none"> The trail has some outstanding views and includes passing by the Kilcunda Trestle Bridge. <i>On its own – it sits as a Regional Trail – collectively with the other multi use trails – it sits as Signature Trail.</i> The trail is close to the growing Bass Coast town of Wonthaggi and the visitor economy hub of Phillip Island. 	<ul style="list-style-type: none"> The trail is relatively short does not link with other products. The options involved with taking the rail trail further towards Nyora form Woolamai Racecourse should be considered. Work in partnership with the other Councils of Gippsland to undertake a feasibility study into the development of a ‘Gippsland Trail’ that has strong linkages into the other rail trails and creates a spine trail providing strong marketability and offering large commercial opportunities for trail and off trail businesses including new Bike Packing Markets.
Regional Trail 28	Traralgon to Morwell Off Road Path	<ul style="list-style-type: none"> Links Traralgon and Morwell to the Gippsland Plains Rail Trail. <i>On its own – it sits as a Regional Trail – collectively with the other multi use trails – it sits as Signature Trail.</i> Off road connectivity between 2 of the largest cities in the Latrobe Valley. Provides a strong foundation from which the Gippsland Trail can head westwards to Moe (feasibility). 	<ul style="list-style-type: none"> Work in partnership with the other Councils of Gippsland to undertake a feasibility study into the development of a ‘Gippsland Trail’ that has strong linkages into the other rail trails and creates a spine trail providing strong marketability and offering large commercial opportunities for trail and off trail businesses including new Bike Packing Markets.



Aberfeldy Track - Toombon

9 Investment

Decisions on investment in trails and support services occur regularly and can be difficult. The purpose of this plan is to provide some support to those decisions in terms of:

- Developing the greatest opportunities
- Filling the greatest market gaps
- Seeking to provide experiences for markets not being served
- Aligning community and visitor economy benefits.

The Gippsland DMP provides the following criteria for investing in visitor economy projects. It is also recommended that this is appropriate for trails-based investment decisions aligned to implementing this study.

Accordingly this study recommends an approach where the following principles are adopted:

1. The greatest return on investment
2. Brand aligned – Gippsland DMP and Gippsland Trails
3. The optimisation of outcomes for business, government and the community
4. Planning issues, land tenure, community views and constraints are considered
5. The investment has a transformational change capability
6. The investment provides quick wins
7. The investment provides regional outcomes.

The initial priorities for the region must be to build the mechanisms from which regional trails can be further developed and from which regional decisions can be made.

Collaboration

- Build the regional processes in order to be able to collaborate on trail based funding decisions

Invest

- Based on the trail hierarchy, invest in trail based infrastructure and services across Gippsland

Monitor

- Monitor user numbers, market trends, gaps in service and experience and adapt the study

In relation to investment, the greatest market gap in Gippsland, (and opportunity for Gippsland) in the Signature Trails classification, is in fully serviced walking/hiking (and riding) experiences. This is closely followed by the need to develop mountain bike hubs or parks of scale and substance, and the desire to develop a linked and cohesive multi use trail network that delivers community and visitor economy benefits.

The following new and or significantly expanded products and experiences are recommended as the highest priority investments across the region (excluding maintenance and local trail developments by individual Councils). This is based on the Signature Trails listed in section 9, and the criteria for investment. This also notes that outside this framework, Councils and other land managers will invest their own capital for local trails, for community wellbeing and connectedness, and for other reasons important to the organisation and their stakeholders.

Signature Walks and Hikes

1. Wilsons Promontory Circuit Track and upgrade (Planning as an initial step)
2. George Bass Coastal Walk (as per the Government's investment commitment)
3. Wilderness Coast Walk from Cape Conran to Point Hicks
4. Sections of the Australian Alps Walking Track including a relaunched and rebranded trail in conjunction with the trail partners the ACT and NSW.
5. The Sea to Summit (Feasibility Study)

Signature Mountain Biking Hubs and Trails

1. Develop the Central Gippsland Mountain Biking Hub with Haunted Hills as a centrepiece
2. Omeo MTB Destination Development
3. Feasibility for the Epic Trail in Central Gippsland
4. The Timber Trail including options for accommodation and servicing

Multi Use Trails

1. Continued development of 'Rail Trails' that together will form the basis of a 'Gippsland Trail'. This includes extensions westward from Leongatha and northwards from Woolamai Racetrack to eventually join into the outer Melbourne transport network
2. The development and implementation of the Gippsland Lakes Aquatic Trail.

Table 10. Actions for investment

ACTION	DESCRIPTION	PRIORITY
8.1	All partners to agree on investment priorities and proactively seek to invest in the development of market based experiences for Gippsland as outlined in this study.	

10 Next steps

This study provides a series of approaches and recommendations for trails in Gippsland. It is appropriate as a first step, following its endorsement by the funding agency, that the GLGN and agencies aligned to this plan implement the Gippsland Trails Coordinating Forum. With support from GLGN, PV, DELWP, Baw Baw and DGL, the forum can provide an implementation strategy with funders that includes consideration of investment priorities.

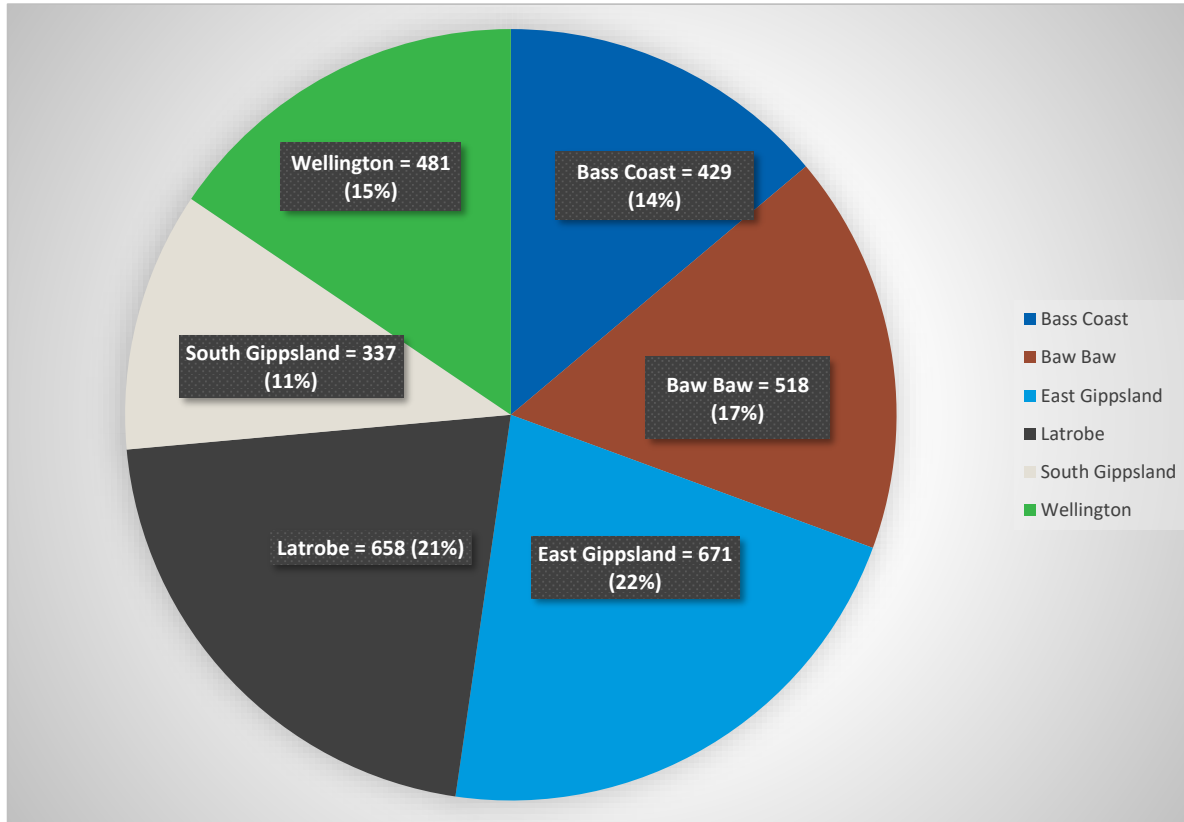
Individual business case and feasibility assessment will be required for some of the developments proposed in this study. By their very nature, the proposals are conceptual and require further detailed analysis and planning.

The development of investment prospectuses, including those in the DMP are important to signal to investors that Gippsland has considered the current offer, the gaps and the future priorities. It has also considered the benefits of investing and believes there is strong future and collaborative approach being implemented between government, industry, the community and the education sectors.



Noojee trestle bridge

APPENDIX A – TOURISM BUSINESS NUMBERS ACROSS GIPPSLAND



TRA Local Government Area Profiles, 2017.

APPENDIX B – SUMMARY OF RELEVANT EXISTING PLANS AND STRATEGIES

DOCUMENT OWNER	TITLE AND YEAR OF PUBLISHING	SUMMARY OF INTENT	FOLLOW UP / ISSUES FOR THE GIPPSLAND FEASIBILITY STUDY
Bass Coast Council	Shaping a Better Bass Coast – Council Plan 2017-2021	<p>Describes the vision, mission and values of Council. The vision being that <i>'Bass Coast will be known as a region that supports a sustainable and healthy community, and values and protects its natural assets'</i>.</p> <ul style="list-style-type: none"> The health priorities include supporting social connectedness. Strategic outcomes include; improving visitor infrastructure and enhancing the lifestyle of the local community, improving the economic value of the region, diversifying the region's tourism market mix by promoting year-round visitation. Eco Development strategic indicators include an increased focus on eco-tourism. References the Philip Island Visitor Economy Strategy as the main tourism plan to implement. Environment strategies include references to better balancing the natural environment and public access including foreshores and waterways. A strong focus throughout the plan on consultation, and good governance. Health and active community directly reference opportunities for healthy active lifestyles and connectiveness. The liveability pillar contains references to the need for access, connections and recreation. 	<p>PI Visitor Economy Strategy – refer to its priorities for trail investment.</p> <p>The Aspirational Networks Pathway Plan 2016</p>
Bass Coast Council	Active Bass Coast - 2018 - 2028	<p>Council's 10-year plan that sets the vision for the provision and use of open space and recreation activities in the Shire. The vision is <i>'a healthy and connected community that regularly participates in recreation and social activities in both natural and structured open spaces'</i>.</p> <ul style="list-style-type: none"> The plan covers 3 main themes – Active People, Active Places and Active Partnerships. The active places stream references 'connecting the Bass Coast Shire via walking and cycling trails'. Active partnerships references; 'Identifying and prioritising regional recreation facilities and boosting the economy via recreation tourism. <p>Walking has been identified as an activity 38% of the community enjoy doing, with participation in cycling at 9% of the community.</p> <ul style="list-style-type: none"> The Gippsland Tracks and Trails Plan (this project) is a priority action. Active Places has an action to partner with PINP and PV to promote natural spaces and nature programs such as bushwalking. 	

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		<ul style="list-style-type: none"> Connecting Bass Coast actions, the Bass Coast Pathways Plan 2017 advocates for its priorities. The active partnerships section has an action to advocate for the extension of the George Bass Coastal Trail and the Bass Coast Coastal Trail. Priority projects include the Inverloch to Wonthaggi Trail and the Inverloch to Wonthaggi Trail, the San Remo Foreshore Trail, and the Bass Coast Rail Trail extension. 	
South Gippsland Shire Council	Australian Mtn Biking Magazine 2013	The article reviews Cement Hill near Foster. Cement Hill has a good mix of blue and black flow trails with good terrain. The write up is positive and encourages people to use the nearby facilities in Foster acknowledging that there is only a car park on site.	Add to the regional trail database.
Bass Coast Shire	Philip Island and San Remo Visitor Economy Strategy 2035	<p>An important document for the Bass Coast and PI. Sets the vision; <i>'PI to be recognised nationally and globally as a world leading sustainable tourism destination, where tourism is embraced by the community'</i>. Relevant strategies include building connectivity.</p> <ul style="list-style-type: none"> Future niche markets are identified and a product gap for the Island walking and cycling trails, as well other experiences. Guiding principles include balancing the environment and infrastructure, community lifestyle enhancement and creating jobs and workforce retention year-round. Market positioning of the Island and Bass Coast will be enhanced by walking trails and lookouts. Walking trails are listed as 'game changer project 8' with investment in coastal walkways, viewing platforms and recreational infrastructure. The strategy also seeks to promote the 'Best Walks of Gippsland' through a cooperative marketing program. 	<p>Importance of the thematic and specifically game changer project 8 to build more trails for walking and recreation, and adding an additional \$3.7 mill per annum in additional expenditure.</p> <p>Cooperative marketing programs for Gippsland and walking.</p>
Bass Coast Shire	Economic Development Strategy 2016 to 2021	<p>Acknowledgment that tourism contributes \$655 million directly and creates 3,100 jobs annually. Enhancement of tourism infrastructure is a key future direction.</p> <p>Visit Bass Coast thematic includes the need for advocacy of more pathways, viewing platforms to attract a wider market of visitors.</p>	More walking trails for economic development objectives.
Bass Coast Shire	Bass Coast Pathways Plan – August 2017	<p>A plan that seeks to objectively assess the pathways in the Bass Coast that are inspirationally required. 53 aspirational pathways across the Shire identified.</p> <p>The following pathways scored very highly on the pathway assessment scoring system (some are community benefit):</p> <ol style="list-style-type: none"> George Bass Coastal Walk Extension 	Consider the pathways that scored 'very high' in the feasibility study.

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		<ol style="list-style-type: none"> 2. Realignment of San Remo Anderson Pathway 3. On road connection from George Bass walk to San Remo 4. Corinella Foreshore Walking Trail 5. Waterline Coastal Walking Trail Jam Jerrup to Corinella 6. Connection to the Wonthaggi Heathlands on road 7. South on Boundary Road from Bass Highway 8. Connection from Archies Creek south to the rail trail at Dalyston 9. Cape Patterson extension on Surf Beach Rd 10. Coastal Walking Track along Cape Woolamai foreshore 11. Coastal connections from Boys Home road to Churchill Is 12. Coastal Walking around Rhyll 13. Coastal walking along Newhaven foreshore 14. Connection from Settlement Road 15. Coastal walk from PI bridge to Cape Woolamai via the Esplanade 	
Baw Baw Shire Council	AMB Magazine	Promo piece on the Baw Baw Mtn Bike Trails – including the flow tracks and downhill tracks.	
Baw Baw Shire Council	AMB Magazine	Article on Erica Mtn Bike Park.	
Baw Baw Shire Council	Cycle Opportunities Assessment November 2017	<p>Deals with the 5 main cycling activities; Road Riding, Mtn Bikes, Gravel Rides, Touring and Cycle Events.</p> <ul style="list-style-type: none"> • Focusses on the Drouin Warragul area. • Identifies the connections to Melbourne and the diversity of landscape as strengths. • Identifies the lack of product knowledge as the weakness in promoting tourism. • Identifies the variety of trails, highly visible signage and infrastructure as 3 priorities for attracting mtn bike riders. • Gravel riders have become a growth sector in riding. • References the Victorian Trail Strategy 2014-2024. <p>Strategies for Growth include:</p> <ul style="list-style-type: none"> • Developing Partnerships • Developing a Marketing Strategy • Attracting Grants and Investment • Improve Cycle Visitor Services. 	<p>Consider the cycle tourism segmentation in the feasibility.</p> <p>Provides NE Vic as a case study – see the NE Vic Cycle Optimisation Plan for ideas</p>

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Baw Baw Shire Council	Bicycle and Walking Paths Development Plan 1998.	<p>Plan being replaced by a new strategy in 2019.</p> <p>Identifies Zones for Trail development / refinement:</p> <ul style="list-style-type: none"> • Noojee – develop 5 walking tracks radiating from the town centre that will help Noojee become a centre for trail use. • Neerim – identifies Neerim as a starting point and seeks to develop / highlight 5 walks. • Erica/Rawson – link Erica Rawson and Walhalla with pathways. • Trafalgar/Yarragon – improvement of existing opportunities. • Warragul/Drouin – develop the Two Towns Trail linking Warragul and Drouin. • Longwarry/Baw Baw – OK as is. • Baw Baw Circuit – consider a circuit track in Baw Baw Council area to link existing pathways. 	
Baw Baw Shire Council	Nature Based Tourism Development Strategy 2006	<p>Identifies the core markets for Baw Baw short break visitors from Melbourne – families.</p> <p>Bush walking, rail trails and adrenaline are products of strength.</p> <p>Tourism contributed \$138 million to Baw Baw Shire and employed 1500 people.</p> <p>Overnight stays from visitors are declining (to 2005) to 200,000 per annum.</p> <p>500,000 day trippers.</p> <p>Bushwalking is listed as a core activity of the targeted markets for Baw Baw.</p> <p>Rail trails identified as a product suited to the older segments in the target market.</p> <p>Major walks listed as:</p> <ul style="list-style-type: none"> • Australian Alps Walking Track • Great Walhalla Alpine Track • Beech Trail, Baw Baw Alpine Resort • Mt Baw Baw Alpine Resort Walk • Mt Worth Walks • Tyers River Walk • Eastern Tyers Walking Track • Latrobe Trail – BBARMB • Latrobe Trail – BBARMB • Thomson River Walk • Glen Nayook Walk • Ada Tree Walk • Toorong Falls Walk 	Consider adding the walks to the database of walks for Gippsland

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		<ul style="list-style-type: none"> Warragul Linear Park Discovery Walk Drouin Nature Reserve Horseshoe Bend Tunnel Walk Mountain Monarchs Walk Beech Gully Nature Walk Two Towns Trail (Drouin to Warragul) Noojee Rail Trail Bridge Powelltown Tramway Moondarra Rail Trail Tyers Junction Trail Walhalla Goldfields Rail Trail Walhalla Tramline Walk Loch Valley Tramway Walk Rokeby Rail Trail <p>Recommends a number of new trails including:</p> <ul style="list-style-type: none"> The boulders walk at St Gwinear in the Baw Baw NP. A Trestle Bridge loop walk at Noojee and a loop track at Glen Nayook. 	
Baw Baw Shire Council	Baw Baw Walk Ride Booklet – December 2011	A well-produced booklet from 2011 that provides info on all the main walks in the Baw Baw Council area. Lists 26 Tracks and Trails in Baw Baw Shire. Provides info on each, including distance, photos and a description.	See brochure for adding to the tracks and trails database for Gippsland.
Baw Baw Council	Mt Baw Baw ARMB Mtn Biking Trails Concept Plan June 2011	<ul style="list-style-type: none"> Provides an assessment and concept for mtn biking on Mt Baw Baw predominantly in the resort. Provides a description and map of the Baw Baw trails. Acknowledges the need for all season summer use at Baw Baw through trail development. Proposes trail heads in the village to tie in with the infrastructure and utilising the existing trail infrastructure where possible. Seeks to build 3 types of trail – X-country, flow and downhill. If all built, the resort will be a mtn biking hub tying in with other Gippsland hubs. 	Consider using ‘hubs’ rather than trails for the broader Gippsland feasibility strategy.
Latrobe City Council	Tracks Trails and Paths Strategy 2016	Latrobe is the largest municipality in Gippsland with a population of 72,000 and this strategy looks at among other elements the health benefits to residents who are generally more disadvantaged than many other municipalities and have lower health outcomes. <ul style="list-style-type: none"> Looks at various programs to get people more active on paths and trails including a cycle to work program. 	Strategy references the ‘Walking Maps’ website run by Victoria Walks as a good source of all trail

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		<ul style="list-style-type: none"> Several intertown links are proposed between major towns including Traralgon and Morwell, and Moe and Yallourn North. Infrastructure recommendations include water fountains for drinking and signage. Aspirational links mentioned in the plan include: <ul style="list-style-type: none"> Link to Yallourn North from Moe Yallourn Rail Trail Link to the Churchill Town to Hazelwood Pondage Link from the Yinnar township to Hazelwood Pondage Link from Traralgon to Traralgon South Link from Morwell to Churchill Link from Moe to Morwell Link from Yallourn North to George Bates Reserve Path on the North side of Narracan to south side of Narracan. 	and walks including maps and directions.
Latrobe City Council	Municipal Public Health and Wellbeing Plan 2013-2017	Plan fits under the Latrobe Council Plan which has a vision <i>'In 2026 the Latrobe Valley is a liveable and sustainable region with collaborative and inclusive community leadership'</i> . Being active is a fundamental part of the plan. Community connectiveness and community safety in open spaces are important.	
Latrobe City Council	Public Open Space Strategy March 2013	Sets the connect for open space and provides the directions for open space management in Latrobe City. The plan categorises open space into 3 levels; local, district and regional. Strong emphasis on the importance of open space for communities	
Latrobe City Council	Latrobe City Events and Tourism Strategy 2018-2022	The purpose is to strengthen Latrobe City Council's profile and position in events and tourism creating a higher return on investment for the community and industry in Latrobe City. The Strategy sets a vision to be Victoria's leading light in major events and regional experiences. The strategy has 4 main objectives which drive a series of strategies and actions. The objectives include: <ul style="list-style-type: none"> Increasing Visitation Increasing Length of Stay and Visitor Spend Increasing the Destination Profile Promoting Community Connectedness 	Strong links to visitor economy outcomes and to the Gippsland DMP.
South Gippsland Shire Council	Paths and Trails Strategy – 2018	Sets a vision for a central rail trail as an active corridor and the project list has this as a focus. Council has a slow rate of population growth and an older demographic.	Need to include the central rail trail focus in the regional thinking

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		<p>The overarching vision is to: <i>Develop South Gippsland's walking, cycling, and horse-riding infrastructure for all abilities, and where practical, safely connect South Gippsland's residents, businesses, and visitors to town centres, schools and main tourism attractions.</i></p> <p>Goals include:</p> <ol style="list-style-type: none"> 1. The South Gippsland Experience – capitalise on the unique features of the region 2. Health and Well-being – providing safe trails for people to use for active and health outcomes 3. All Abilities – inclusion of all people and all abilities 4. Safety and perception – aimed at off road paths for safety of users 5. Connecting People and Places – integrated network and strategic links 6. Awareness and Education – creating opportunities for walking, horse riding and cycling 7. Economy and Tourism – high quality infrastructure contributing to a healthy and strong economy 8. Most streets in Sth Gipps fall below the 3,000 cars per day Austroads AARB design – so no cycle lanes are required <p>2018 projects include:</p> <ul style="list-style-type: none"> • The extension of the Great Southern Rail Trail to Nyora. • The development of the Hoddles Mountain trail from Fish Creek with a look out point. • Development of a link between Sandy Point and Waratah Bay. • A number of paths and shared paths within town boundaries that are outside the scope of the regional overview. • Indications that the Shire and the Prom Coast MTB group want to establish Cement Creek as a world class facility. 	<p>Alignment of the visions?</p> <p>Consider Cement Creek Trails in the regional review and study</p>
South Gippsland Shire Council	Economic Development Strategy – 2018-2020	<p>States the objective of the strategy is to grow employment and businesses. Build on the clean and green image and the brand of Prom Country.</p> <p>The strategy has 3 goals:</p> <ul style="list-style-type: none"> • Business attraction and development • Business Support • Promotion, marketing and networks <p>The strategy appears to be focussed on agriculture, manufacturing and transport.</p>	<p>Link objectives to the regional study and other Councils – build a consensus view on the importance of trails</p>

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		Tourism is a pillar in the strategy – and focusses on lifestyle and linking other sectors. Rail and walking tracks are listed as assets. Promoting new and existing rail trails is a stated action.	
South Gipps Shire Council	Great Southern Rail Trail Extension – Cost Benefit Analysis Dec 2017	The current trail stretches 71 km and this project seeks to extend it a further 20 km linking Welshpool and Alberton. The trail extension based on the assumptions would have a net positive benefit of \$2,239,000 and a BCR of 1.4, with an internal rate of return of 6.39%. The extension would lead to an additional 23 day trips and 21 overnight trips. The sensitivity if 15% for break even. 12.4 FTE jobs are created in the operational phase of the extension.	Consider the findings in the regional study
South Gippsland Shire Council	Prom Country Eco Impact Assessment and Visitor Profile – 2012/2013	<ul style="list-style-type: none"> Tourism is important with most accommodation providers relying on tourism for at least 80% of their revenue. Annual occupancy reported at between 35% and 70% (Prom higher). Per person spend in winter was \$127 per night and \$99 in summer. Day trippers was \$80 in winter and \$42 in summer. Tourism directly employs 646 people in Sth Gippsland. Across all seasons a high proportion of visitors were couples. Recommendations include product development for growth in winter visitors. Not a lot of recommendations on trails generally. 	
Wellington Shire Council	AMB Article	Blores Hill expose – showcasing the site as a great all year mtn bike destination.	
Wellington Shire Council	Great Rides in Wellington	Brochure/booklet and online resource outlining the rides in Wellington. Includes: <ul style="list-style-type: none"> The Stratford Arts Trail Circuit – 8kn easy circuit around Stratford The Sale Town Ride – 10 km easy ride The Stratford Weirs Crossing Circuit – 14 k easy ride The Sale Herb Gyatt Sanctuary Ride – 16 k easy ride The Sale Longford and Swing Bridge rides at 16 km's and easy The Heyfield Lake Glenmaggie ride – 16 km easy ride on sealed roads The Maffra Bundalagwah Road circuit – 19 km easy ride The Maffra RAAF base circuit ride – 24 km easy sealed ride 	

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		<ul style="list-style-type: none"> • The Maffra Bellbird Corner Circuit ride – 25 km easy ride • The Heyfield Dawson Flora Reserve – Cowwarr ride – 22 km and medium difficulty • The Yarram Jack River ride – 24/33/38 km easy grade depending on the loops chosen • The Yarram Port Albert Tarraville circuit – 36 km and easy grade on sealed roads • The Rosedale Willung circuit – 49 km on sealed roads and easy to medium • The Maffra to Glenmaggie to Heyfield circuit ride – 55 km and medium difficulty • The Yarram to Balook and Tarra Valley ride – 66 km on sealed roads with a high degree of difficulty • The Yarram Woodside Beach circuit – 62 km on sealed roads – easy grade • The Maffra Briagolong Newry circuit – 70 km on sealed roads – easy grade. • The Heyfield Cheynes Bridge ride – difficult on narrow sealed roads • The Gippsland Plains rail trail – 67 km of rail trail between Stratford and Traralgon • The Heyfield Blores Hill Mountain Bike Park = over 30 km of trails varying in difficulty 	
Wellington Shire Council	Walking and Cycling Strategic Plan – 2012-16	<p>**Now technically out of date</p> <p>Focused on physical activity for health and community benefits.</p> <p>Strong message about youth and using trails as the main method of transport through cycling, walking or other.</p> <p>The objectives are focussed on healthy, liveable and active communities and include:</p> <ul style="list-style-type: none"> • Guiding the development of walking and cycling trails to encourage residents and visitors to become involved in activity • Finding destinations for walking and cycling • Removing barriers that discourage the use of infrastructure for recreation, health and well-being as well as commuting • Guiding new developments to ensure future provision of walking and cycling infrastructure • Developing principles that guide the development of walking and cycling path networks • Promoting in partnership with the community, the benefits of walking and cycling. <p>Trails mentioned that have not been included to date include the Grand Strzelecki Track, the Tarra Trail, as well as walks in the Alpine National Park, and the foothill forests.</p> <p>Projects are predominantly footpaths, crossings, and share paths.</p> <p>Partnerships are deemed as important.</p>	

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Wellington Shire Council	2030 Community Vision – V2 in 2017	The vision is for: <i>'Happy people, healthy environment and thriving community in the heart of Gippsland'</i> . Tourism employed 5.45% of people in Wellington at 2017.	Community vision
East Gippsland Shire Council	Gippsland Lakes Discovery Trail	Feasibility and route assessment to link the Gippsland Rail Trail to the coastal township of Lakes Entrance. Route is described through Colquhoun and Palmers Rd.	
East Gippsland Shire	Advancing Cycle Tourism in East Gippsland – Marketing plan and asset analysis – TRC 2015	<ul style="list-style-type: none"> The plan and its parent aim to make East Gippsland a place of cycling significance nationally. East Gippsland is seen as having strengths in only trails and not as significant as other destinations such as ride High Country. The plan provides details on the various trail components and a situational analysis of the markets. The plan provides an asset database of trails in the region. The main product strength is the Gippsland Rail Trail augmented by the Gippsland Lakes Discovery Trail to Lakes Entrance (100 km and 25 km respectively). Mountain bike destinations include Colquhoun Mountain Bike Park, Mount Taylor and Nowa Nowa Mtn Bike parks. Cycling events have been regional or local in nature. The plan gives a breakdown of the strengths, weaknesses, opportunities and threats of the region and the markets with their preferences. East Gippsland has positioning opportunities including tranquil and nature as core elements. 	Good market assessment of East Gippsland
East Gippsland Shire	Cycle Tourism Action Plan 2012-2017	<p>The plan seeks to grow the cycle tourism market through a short and medium term set of actions under the following headings:</p> <ul style="list-style-type: none"> Marketing – develop the brand and build consumer demand Infrastructure – build infrastructure in key destinations and improve maintenance to sustain demand Events – improve capacity of existing events and build new ones Industry and Product Development – improve product gaps and industry capability Partnerships and Packaging - Seeking to partner within region and externally and develop packages for the marketplace Strategic Management <p>The vision is for: <i>'In five years East Gippsland will be a recognised cycling destination in Gippsland and Victoria. This achievement will be realised by effective stakeholder collaboration for the benefit of the tourism industry and for East Gippsland's economy and community as a whole.'</i></p>	Well structured

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East Gippsland Shire	International Tourism Action Plan – 2016-18	Seeks to grow the share of international visitors to East Gippsland – and particularly attract Asian visitors to fishing opportunities on the Lakes – despite the largest existing markets being traditional markets including the UK, USA, NZ and Germany. Considers the Bataluk Trail.	Bataluk Trail needs further consideration regionally as a cultural highlight
East Gippsland Shire	Operational Works Plan – East Gippsland Rail Trail October 2013	<ul style="list-style-type: none"> The plan seeks to provide an overarching view of the rail trail and its needs. Identify emerging issues. Allow for accurate planning of maintenance and improvements works. Provide a sound basis for funding to undertake the necessary works. Operationally and works program focussed as per the brief. 	
East Gippsland Shire	Trails Strategy – Part 1 - Policy	Like other Council trail strategies, this plan seeks to provide actions and strategies to improve physical health, social and recreational benefits, improve the environmental aspects around trails and increase economic returns. A range of strategic guidelines are included but many are general in nature such as ‘Council should encourage, foster support etc. Provides details on types of trails including; Urban shared pathways, peri-urban walking and cycling tracks and bushland walking/mtn biking trails.	
East Gippsland Shire Council	Trails Strategy Part 2 - Issues	<ul style="list-style-type: none"> Includes a strong methodology for trail planning and development. Explores funding options for trails. A range of strategic guidelines are provided for trail design and planning for economic and tourism development including the provision of cycle and trail friendly infrastructure, business development, event attraction, a one stop website, etc. Guidelines are provided for route planning, including connectivity and trails. Management of user conflicts is considered including design guidelines, duplication, education and dogs. Risk management is considered. The use of IMBA as guideline are considered and recommended as the construction std for mtn bike trails. The importance of appropriate and up to date signage is considered and recommendations made. 	
East Gippsland Shire	Trails Strategy Part 3 – Examples and Resources	Provides a database and library of standards, examples and classification tools for managers of trails. The use of IMBA guidelines for Mtn Bike Trails is outlined.	Contains the classification standards for trails.

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			IMBA guidelines are outlined
East Gippsland Shire	Lakes Entrance Aboriginal Tourism Plan June 2015	<p>Acknowledges existing products including the Bataluk Cultural Trail, the Krowathunkaloong Keeping Place in Bairnsdale and while not included in this plan, joint management has progressed cultural awareness and signage at many parks including those jointly managed.</p> <ul style="list-style-type: none"> • Provides insights into Aboriginal tourism markets as at 2015 • Provides advice on factors that can lead to success in Aboriginal tourism. • The plan provides a vision for Aboriginal tourism in East Gippsland specifically Lakes Entrance. The long-term goal is to provide a tourism hub in Lakes Entrance owned and operated by Aboriginal people that provides bookings, activities and a centralised service for cultural tourism <p>A number of strategies and actions are provided for Aboriginal tourism under the following headings:</p> <ul style="list-style-type: none"> • Governance • Product Development • Training and Capacity Development • Partnerships • Communication. 	
East Gippsland Shire	Coastal Wilderness Walk Concept Plan 2012	<p>The plan proposes a range of experiences on the trail from Marlo to Mallacoota including independent bushwalking, supported walking and guided walking with accommodation.</p> <ul style="list-style-type: none"> • The plan provides for enhanced track services. • Development of an iconic wild walk. • At the time of the plan, costs were estimated at \$4.85 million generating 41 jobs within the region over time. • The report is strong and at the time aligned with all the State and National tourism strategies. • The vision provides for: <i>'The Coastal Wilderness Walk will provide a distinctive experience which showcases the remote wilderness coast and its history but is safe and achievable for a range of walker types.'</i> • The market is seeking up to 4 to 5 days maximum for walks of this type. 	This option is still relevant and needs to be considered in the regional strategy
East Gippsland Shire and DGL	Gippsland Lakes Ecotourism Action Plan – April 2015	<p>The plan is action oriented and proposes actions under the following headings:</p> <ol style="list-style-type: none"> 1. Deliver an ecotourism industry development program 2. Develop and promote the Gippsland Lake Trail – packaging and promoting a number of experiences 3. Creating an Aboriginal Tourism Support Program 	Follow through on the idea of the Gippsland Lakes Trail

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		<ol style="list-style-type: none"> 4. Support a Gippsland Lakes Eco Event 5. Develop and implement specific marketing activities for Ecotourism experiences 6. Coordinate improved visitor communications for ecotourism experiences 7. Support the development of complimentary tourism experiences 	
High Country Back Roads Tours	Multiple Partners	Brochure to provide 10 back country tours across all tenures in East Gippsland. Predominantly aimed at off-road or soft road adventures but also caters for easier sealed road experiences.	Mostly not in scope of this study
East Gippsland – Lakes and Wilderness	Lakes and Wilderness Tourism	23 walks categorised by location groupings to showcase East Gippsland. Contains grading and how to get there as well as a brief description of each walk and its facilities.	Provides a good database for this study – particularly more important ones.
East Gippsland Shire	Omeo Mtn Bike Feasibility Report Sept 2017	<p>A concept design for 174 km of trails to help make Omeo a nationally significant mtn bike destination. Outlines the economic advantages of the mtn bike destination including employment generated in the order of 15 to 330 FTE annually.</p> <p>Follows the World Trail report and generally both are in full alignment other than scale and volume of trails.</p> <p>Provides advice on facilities and services required to develop Omeo to a high and national standard.</p> <p>The vision for the site includes:</p> <ul style="list-style-type: none"> • High quality beginner friendly trails • Long distance descending trails • Large loop cross-country wilderness rides • High quality trails in close proximity to the township. 	
DELWP	Central Gippsland Public Land Strategy 2018	<p>Designed to create a new future for Central Gippsland and provide a stimulus in the era of manufacturing and electricity disruption in the Latrobe Valley.</p> <ul style="list-style-type: none"> • Presents a folio of 58 projects aimed at providing a range of experiences and options for people. • This study is referenced in the Strategy. • Aims to increase tourism related jobs by 2,600 to 7.5% - the Victorian regional average rate. • References Tasmania taking a lead in seeking investment in private infrastructure and trails tourism and recommends Gippsland has the core ingredients to do similar. • Recommends 2 hero products – Walhalla/Baw Baw and Wilsons Prom in the study area. • Indicates that the Australian Alps Walking Track has eroded and is now a sub-par experience. 	<ul style="list-style-type: none"> • Include some of the recommendations including the refreshed trail alongside the proposed new railway to Erica • New walking tracks in Walhalla

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		<ul style="list-style-type: none"> The main projects do not generally include trail-based projects – but will add to the appeal of visitors and increase trail use – therefore trails need to be considered as part of the infrastructure to help bring and keep people. New walking tracks in Walhalla to bolster the destination appeal. Recommends a new trail head and facilities for the AAWT. Refresh the AAWT from Walhalla to Baw Baw and offer a 2-day serviced walk with a glamping option along the way. Baw Baw Village – improve mtn biking and bike lifting options. Tarra Bulga recommended to include new walking tracks and infrastructure. <p>Rail Trails – the strategy recommends:</p> <ul style="list-style-type: none"> Maximising connectedness Maximising economic benefits Achieving Financial Viability <p>The main Rail Trails are:</p> <ul style="list-style-type: none"> The Great Southern Rail Trail The Grand Ridge Rail Trail The Gippsland Plains Rail Trail <p>Mtn Bike options include:</p> <ul style="list-style-type: none"> Haunted Hills MTB Park (greenfield) Blores Hill (existing with room for expansion) Mt Baw Baw Omeo (Proposed) Kilcunda (concept Only) References the GLGN study into rail improvements and recommends VLine improvements to rail services for cyclists Walhalla to Latrobe Valley (concept only) Great Southern Rail Trail. 	<ul style="list-style-type: none"> AAWT refresh recommended Tarra Bulga recommendations re new tracks as a support project Note the rail service improvements recommendations for cyclists
DGL	DRAFT Gippsland Destination Management Plan 2019	<p>While still draft, the Destination Management Plan (DMP) provides the strategic directions and a raft of actions to develop the visitor economy in Gippsland for the next decade through to 2029.</p> <p>The plan leads with a vision to that ‘Gippsland’s natural beauty, outstanding experiences and life changing moments inspire the world to visit.</p>	Drives the positioning, the brand and the framework to deliver visitor economy growth to Gippsland.

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		The plan includes a series of experience development recommendations and pillars under which to grow the compelling experiences Gippsland could provide	Showcasing the region through trail based tourism is high on the priority list.
DGL	Brand Gippsland – Brand Framework – Dec 2017	Notes that nature might be a bit hard for some markets for Gippsland – untamed and difficult to access – hard core. Heroes are not attached to brand Gippsland. Describes a range of core competencies including walking and cycling. Focus on nature and adventure – all trail linked.	
DGL	The Gippsland Lakes Trail - 2015	Provides the concepts, rationale and ideas behind the development of a ‘Gippsland Lakes Trail’. Packages a set of experiences together to form the trail. The plan also attempts to link the ‘trail’ to services such as accommodation, cafes, restaurants etc. The plan divides the trail into a number of sections with experiences: <ul style="list-style-type: none"> Trail 1 – Lakes Entrance to Colquhoun Forest and Nyerimilang Trail 2 – Eagle Point, Paynesville and Raymond Island Trail 3 – Boole Poole, Bunga Arm and the 90 Mile Beach Trail 4 – Loch Sport to Sperm Whale Head. A range of other trails and supporting links and experiences are referenced. New and existing business opportunities are discussed. Communication methods and markets are described and recommended. A set of recommendations are provided to bring the Trail to life.	Reference the concept to the study considerations
DGL	Gippsland Walks	40 Walks in Gippsland brochure. Describes the walks by sub-region, and provides really good info on each walk, its facilities and offer.	Use when building the trail list
DGL	Touring Map	Touring map of Gippsland with main roads, products and some experience information.	
State Gov	Victorian Trails Strategy 2014 to 2024	The current government strategy sets a vision for Victoria to be recognised as a leading trails destination built on a diverse range of experiences. The strategy aims to improve the quality of Victoria’s trail experiences, increase awareness of the trails, support complimentary tourism and retail businesses and seek to better understand markets and their preferences.	Consider the hierarchy of trails in this strategy for adoption in the feasibility study. Need to consider the hierarchy of each of the

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		<p>The strategy provides the strategic context for trails and outlines the importance of tourism and nature-based products to Victoria.</p> <p>The strategy provides investment criteria for the guidance on which trails to invest in.</p> <p>The strategy also provides a hierarchy of trails based on attributes when considering their importance – particularly into the following headings:</p> <ul style="list-style-type: none"> • International and national significant trails • State significant trails • Regional and local significant trails. <p>The document discusses how the State can provide more market awareness of the trails, build partnerships and promote better use of the trails, and provides a number of case studies – some of which are now out of date, with changes to trail management and new products entering the market.</p> <p>The strategy provides a description of the trails in Victoria under each of the hierarchy levels. For Gippsland these include:</p> <p>International and national significant trails:</p> <ul style="list-style-type: none"> • Falls to Hotham (just outside the scope of this document) <p>State significant trails:</p> <ul style="list-style-type: none"> • The Coastal Wilderness Walk • East Gippsland Rail Trail • Gippsland Plains Rail Trail • Great Southern Rail Trail • Great Walhalla Alpine Trail • Wilsons Promontory Circuit via the Lighthouse 	<p>trails listed in National and State significance.</p> <p>Provides the IMBA and Aus. Standards for walking tracks.</p>
Partners	Gippsland Regional Plan – 2015 to 2020	<p>The plan is a partnership between the leadership of Gippsland, including all 3 levels of government, RDA, the Committee for Gippsland, the Regional Managers Forum, GLN and other groups.</p> <p>Themes are:</p> <ul style="list-style-type: none"> • Economic Prosperity • Education and Community Wellbeing • Natural Environmental Stewardship • Connectivity. <p>Specific to the trails feasibility study – a number of themes are important – and reinforce potential strategic directions:</p>	

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		<ul style="list-style-type: none"> The need to attract investment in Gippsland's public parks Adaptation to climate change Improvement in the Gippsland Lakes. <p>Gippsland's vision is set as: <i>Gippsland – Australia's smart region with world-class environments, maximising opportunities for investment and employment.</i></p>	
GLAWAC and Victorian Government	Joint Management Plan - Gunaikurnai	<p>The joint management plan for Gunaikurnai joint managed parks and reserves in Victoria. While not covering all of the study area – contains the important joint managed parks now under the guidance of the plans.</p> <p>Speaks to the importance of the land to Gunaikurnai and the desire to see:</p> <ul style="list-style-type: none"> A strong cultural connection to country healthier parks and land wider respect from the community jointly managed parks become a landmark destination for use, recreation and nature-based tourism. <p>Contains a strategic plan and plans for each of the jointly managed parks.</p>	
Local Government Infrastructure Design Association	Infrastructure Design Manual	<p>A comprehensive document specifying the design processes and outcomes for infrastructure that is generally adopted by Local Government.</p> <p>The document has been adopted by the Local Governments of Gippsland and contains sections on unsealed paths.</p>	Relevant to trail standards in some circumstances.

APPENDIX C – SIGNIFICANT TRAILS FROM THE VICTORIAN TRAILS STRATEGY

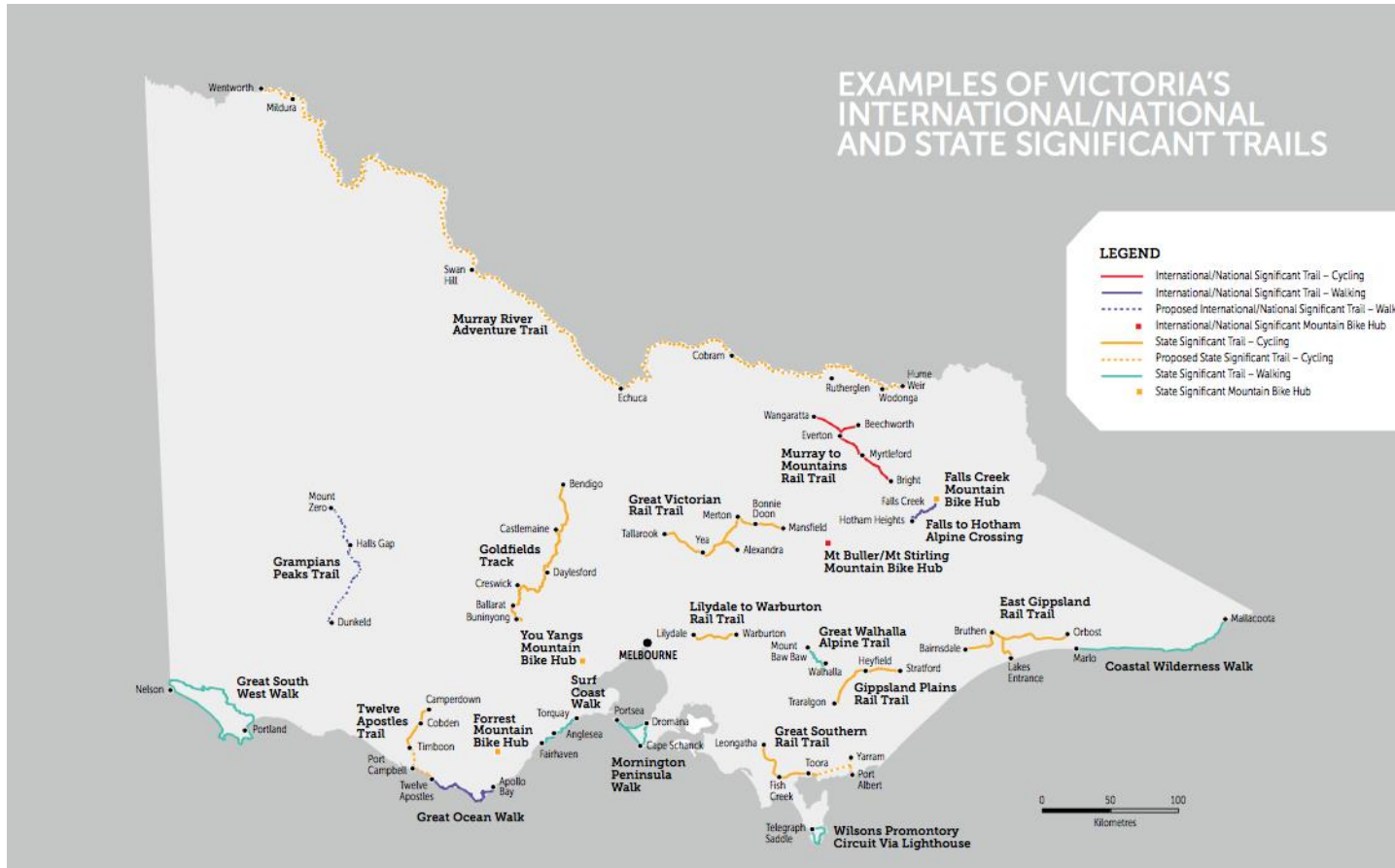


IMAGE: Significant trails in Victoria. SOURCE: Victoria's Trails Strategy 2014-24

APPENDIX D – CASE STUDIES OF OTHER TRAILS AND TRAILS DESTINATIONS

Case Study: Three Capes Track, Tasmania, Australia



The Three Capes Track is a 4-day/3-night hike in Tasmania's south, totalling 48 kilometres in length. The walk is graded easy to moderate and leads visitors through a myriad of natural landscapes with exhilarating clifftop outlooks on Cape Pillar and Cape Hauy and stunning views to Cape Raoul. The trail experience starts at Port Arthur, with a 60-90 minute boat ride including interpretation around the Southern Peninsula to the start of the track.

The first day is a 4 kilometre walk. Day two is 11 kilometres, day three 19 kilometres and day four 14 kilometres.

The track is well-defined and purpose-built including timber boardwalks and several sections of stone steps. It also includes a series of interpretive encounters along the track, marked by whimsically-shaped benches and artistic installations. An accompanying handbook explains the tale of the Tasman Peninsula's human and natural history at each stop.

Overnight accommodation is at huts managed by Parks and Wildlife Service, with shared rooms featuring mattresses, toilets and all cooking facilities and equipment provided. Cold showers are also available.

A commercial operator has recently built two high-end huts that offer fully serviced and accommodation packages, including all bedding, hot showers and food and wine.

The fee for 3 nights on a self-guided visit to the Three Capes Track is \$495 per person. This includes entry to Port Arthur Historic Site (valid for 2 years), car parking and secure lockers; Pennicott Wilderness Journey cruise departing Port Arthur twice daily; 3 nights self-catered accommodation in cabins on track; bus transfer from Fortescue Bay back to Port Arthur Historic Site twice daily; "Encounters on the Edge" guidebook with maps and trail access.

A maximum of 48 people can depart each day with bookings made online. Walkers can only travel in one direction.

Parks and Wildlife Service figures show that around 600 people per year hiked on the old tracks south of Cape Hauy before the creation of the official Three Capes Track. More than 1300 people hiked the Three Capes Track in the first month of its opening. A Media Release published in October 2017 by Elise Archer, the Minister for Environment and Parks stated that a total of 6,628 forward bookings had been received for the track

experience through to the end of August 2018.⁵² Since opening in December of 2015, more than 15,500 people, locals and internationals, have completed the walk.⁵³

A range of commercial operators provide services for Three Capes Track walkers including accommodation pre and post walk, shuttle services and 'gear and gourmet' food and equipment supplies. Although only one commercial operator can offer accommodation on the actual track, others are offering guided experiences on the track with accommodation off-track.

For visitors that do not wish to complete the entire 3 night Three Capes Track experience, Parks and Wildlife Service has also facilitated a 29 kilometre round-trip walk that accesses Cape Pillar via the old Cape Pillar track from Fortescue Bay, with a formal campsite provided at Wughalee Falls featuring tent platform, toilet and rainwater tank.

Some of the tourism and planning accolades that the Three Capes Track has received include: Best New Tourism Business – Tasmanian Tourism Awards – 2016; Best New Tourism Business – Qantas Australian Tourism Awards – 2016; International Planning and Design Award – American Trails – 2017; Tasmanian Development of the Year – Property Council of Australia – 2018; Ecotourism Winner – Tasmanian Tourism Awards – 2018.



⁵²

http://www.premier.tas.gov.au/releases/three_capes_track_book_ed_through_to_april

⁵³ News Article published 25 May 2017.

<https://wild.com.au/news/three-capes-track-wins-international-planning-and-design-award/>

Case Study: Barwon South West Adventure Trails, Victoria



The Barwon South West region of Victoria wanted to plan and position itself as an adventure trails destination. The region covers 9 local government areas and incorporates numerous reserves, natural areas and visitor destinations.

Previous planning efforts for walking, cycling and mountain biking had been challenged by the complexity of the region, its numerous stakeholders and the large range of trails and trail management arrangements.

Over 20 trails already existed in the region, including 6 international and nationally significant trails and mountain biking hubs. An impressive calendar of international and national cycling and trail based events was also in place.

A Vision and Business Case, Action Plan, Cycle Tourism Strategy, Marketing Strategy and Guidelines for Trail Planning, Design and Management were each prepared to achieve a coordinated and collaborative approach in developing a leading trails destination.

The approach taken was visitor-centric, rather than a landowner/manager approach and best-practice from world leading trail developers was utilised.

The outcomes included successful buy-in to the importance of lead and support trails, and agreement on which; community support and an understanding of the roles of the different trails; trails construction and management guidelines to assist the community; agreement to the commitment of funds to jointly invest in the priority trails; and a business case for investment.

Importantly, the project was implemented with the stakeholders continuing to work closely together on the agreed strategy. This included giving priority to a small number of iconic trails that could position the region, without being parochial. These would be priorities for investment, development and marketing within the bounds of expected resources.

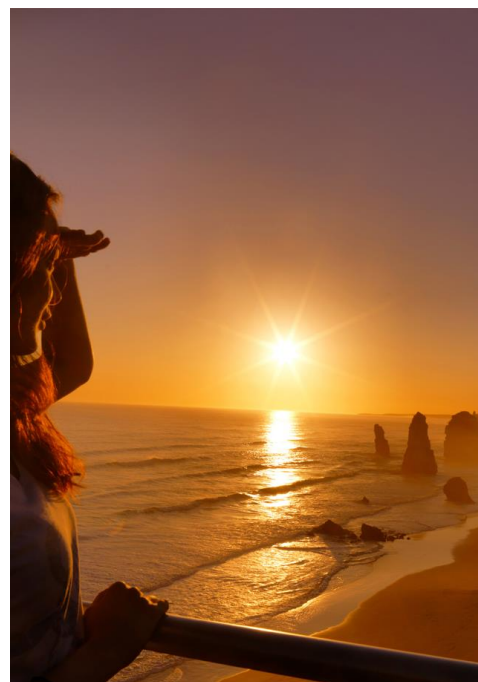
These prioritised trails would become flagships for the region, form the core adventure trails and cycle tourism offering in the region and be used to attract private and public sector investment, and would offer the best opportunity for revenue generation.

- Great Ocean Walk
- Grampians Peaks Trail
- You Yangs MTB Trails
- Surf Coast Walk
- Forrest MTB Trails
- Twelve Apostles Trail
- Great South West Walk

With implementation of the proposed improvements and if the leading trails continued to attract existing and new visitors to the region, it was estimated that a 10% increase in visitor numbers could be achieved. This would result in an estimated \$24 million in direct visitor expenditure per annum in the region and 273 jobs. In addition, the flow-on effects as a result of indirect expenditure were expected to be greater.⁵⁴

The Barwon South West Adventure trail network is expected to deliver significant economic benefits to the Victorian community. With a 6 year investment of \$40 million, the trail network net upgrade is expected to deliver \$74.7 million in benefits over 10 years.⁵⁵

TRC’s success in developing a workable and consistent regional approach to partnering in the delivery of a trail destination in the Barwon South West region of Victoria was recognised in the Planning Institute of Australia (PIA) Awards for Planning Excellence. The Guidelines won the Victorian Best Planning Ideas – Large Projects Award in 2015. The project also received an award from Parks and Leisure Australia in 2016.



⁵⁴ TRC Tourism, Growing Adventure Tourism in Barwon South West Region, A Business Case for Investing in Regional Trails in Barwon South West Region, June 2015

⁵⁵ TRC Tourism, Growing Adventure Tourism in Barwon South West Region, A Business Case for Investing in Regional Trails in Barwon South West Region, June 2015

Case Study: Queenstown Trails, Queenstown, New Zealand



Queenstown Trails are a successful example of visionary planning to respond to changing trends and extend the trails offering. TRC's work in planning for this trails network is a benchmark in ongoing planning and adaptive management of a major trails network.

An initial strategy was developed in 2004 to guide development of a world-class 190+ km network of walking, hiking and biking trails across multiple tenures in the iconic nature-based and adventure destination of Queenstown. This trail network became an important local and tourism asset, with 90% of the plan having been implemented.

In 2015, a new strategic plan to guide the next 10-year phase of trail development and management was developed. In close consultation with trail stakeholders and community, outcomes of the first strategy and changes affecting use of the trails were analysed, and a vision and performance target were agreed.

The new plan consolidated work completed to-date and looked to respond to new opportunities not foreseen 10 years before. It also provided a solid footing for further growth in the trail use across the region and addressed the need to complete trail

linkages for local resident and visitor use; strategies to improve trail experience delivery; ways to promote increased use and community stewardship of trails; improved information gathering; and sources of sustainable funding for trails development and management.

A survey of Queenstown Mountain Bike Club members and trail users in 2016/17 indicated a range of economic impacts resulting directly from the Queenstown Mountain Bike trails:

- Mountain bike trail users were estimated to spend \$64 million per year in the Queenstown region. This spending covered bike related expenses, food and beverage, other retail spending, other adventure tourism spending and for overnight visitors, spending on accommodation.
- The trails generate a total of \$25 million in income for the Queenstown region annually.
- The operation of the trails and the users are estimated to generate a total of 335 FTE jobs in the region (both direct and indirect).⁵⁶

⁵⁶ Review of Economic Impact of Queenstown Mountain Bike Trails Draft Report May 2017

The Queenstown Trails are undeniably a part of the success of the tourism industry in Queenstown, with visitation growth and spending at record levels. Queenstown was the South Island’s number one visitor destination in 2018.⁵⁷

The Queenstown Trails Trust Trail Count Report dated 3rd April 2017 reported that there have been ‘a total 1,294,144 trail journeys and 5,758,941 total trail movements (clicks) since opening in October 2012, this includes 114,982 journeys so far in 2017, compared to 109,538 in the same period in 2016, a 5% increase year on year so far.’

In late 2018, Google mapped 120 km of the trail to bring the trails into the digital age and publish the hiking and cycling tracks online.

Further expansions to link the resort’s outer suburbs are planned in 2019, with the first stage of building works expected to start by the end of the year.

Queenstown Trails are also currently part of a new project, which will connect 4 existing Great Rides and link 30 communities along a 530 km continuous cycle trail network across Otago. The Government has committed over \$13 million in funding for this proposed extension, which will be matched by local funding to reach the total \$26 million required.



⁵⁷ Radio NZ Article 28th January 2019 <https://www.radionz.co.nz/news/national/381129/queenstown-remains-top-south-island-destination>

Case Study: Great Ocean Walk, Victoria, Australia



The Great Ocean Walk is Victoria's premier long distance walk. It stretches approximately 104 kilometres along the south-west coast and traverses the coastline and forest from Apollo Bay to the iconic Twelve Apostles, Port Campbell National Park.

The trail offers walkers the option of short walks to day hikes and longer 7 night/8 day camping experiences. The proximity to local towns also allows for visitors to stay in 'o-walk' accommodation and enjoy a variety of independent or packaged services, such as tours, guides, transport providers, food and wine.

Most of the Great Ocean Walk sections could be classified as suitable for most ages and fitness levels, with some bush walking experience recommended.

The sections of the Great Ocean Walk can be broken up by campsite stops.

- Section 1 – Apollo Bay Visitor Information Centre to Elliot Ridge Campsite = 10.3km.
- Section 2 – Elliott Ridge Campsite to Blanket Bay Campsite = 13.3km.
- Section 3 – Blanket Bay Campsite to Cape Otway Campsite = 11.4km.
- Section 4 – Cape Otway Campsite to Aire River Campsite = 9.8km.
- Section 5 – Aire River Campsite to Johanna Beach Campsite = 15.3km.
- Section 6 – Johanna Beach Campsite to Ryans Den Campsite = 14.8km.
- Section 7 – Ryans Den Campsite to Devils Kitchen Campsite = 15.3km.
- Section 8 – Devils Kitchen Campsite to Great Ocean Road information bay adjacent to Glenample Homestead = 14.1km.

Self-guided walkers can choose to have accommodation arranged or to use the campsites along the route. Each campsite has 8 individual camp 'pads' set into the surrounding bushland which can accommodate a 2-3 person tent. Registration fees apply at these campsites and hikers must book at least 2 weeks in advance.

Part of the appeal of the walk is that it is accessible to everyone, from visitors that want to carry their own equipment and walk independently, to those who wish to only carry a daypack and enjoy a more luxurious transfer and accommodation hosted option.

There are no trail fees to walk the Great Ocean Walk.

Opened in January 2006, the Great Ocean Walk displayed signs of immediate economic benefits. The Victoria's Trails Strategy 2013-2023 stated that the Great Ocean Walk involved 'more than 40 marketing partners; and in 2009, the Walk provided an estimated annual impact of \$15 million (including marketing, visitor expenditure and flow-on expenditure) and more than 100 full-time jobs.'



Case Study: Ngā Haerenga, the New Zealand Cycle Trail



Each year more than 1 million people use the 22 Great Rides of Ngā Haerenga, the New Zealand Cycle Trail.⁵⁸

The Great Rides are the premier rides on the New Zealand Cycle Trail. They are predominantly off-road trails that showcase the very best of New Zealand's landscape, environment, culture and heritage. These trails have given new life to old tracks, roads and disused railways, provide exciting journeys on 2,500 kilometres of trails suited to everyone from sightseeing riders, to serious mountain bikers up for a challenge.

'Nga Haerenga, The New Zealand Cycle Trail' originated as a partnership project between the Government and the Green Party of

Aotearoa New Zealand. The Government invested \$50 million into turning this idea into a reality, with additional contributions of \$30 million from local Government and cycle trail

Trusts resulting in the various Great Rides being established across the country. The trail is estimated to have a cost benefit ratio of \$1 to \$3.55⁵⁹ and the estimated economic contribution of the trails in 2015 was \$37.4 million.⁶⁰

⁵⁸ <https://www.mbie.govt.nz/immigration-and-tourism/tourism/tourism-funding/nga-haerenga-the-new-zealand-cycle-trail/>

⁵⁹ MBIE Ngā Haerenga NZ Cycle Trail Evaluation Report 2016 (based on 2015 calendar)

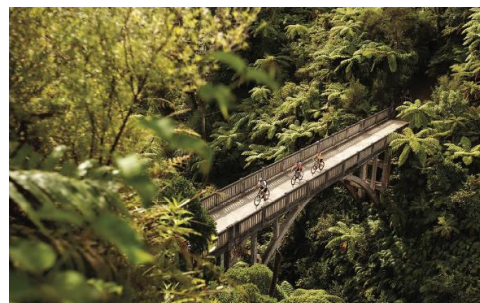
The Great Rides are supported by over 400 Official Partner businesses around the country offering a wide array of experiences from accommodation to bike hire, tours, transport, attractions and activities.

- Twin Coast Cycle Trail, Northland / 84 km / 2 days
- Hauraki Rail Trail, Coromandel / 77 km / 2 days
- Waikato River Trails, Waikato / 102 km / 1-4 days
- The Timber Trail, Central North Island / 77 km / 2 days
- Motu Trails, East Coast / 132 km / 1-3 days
- Te Ara Ahi (Thermal by Bike), Rotorua / 66 km / 2 days
- Great Lake Trail, Taupo / 74 km / 2-3 days
- Mountains to Sea, Ruapehu-Whanganui / 317 km / 1-6 days
- Hawke's Bay Trails, Hawke's Bay / 187 km / 1-4 days
- Queen Charlotte Track, Marlborough Sounds / 70 km / 2-3 days
- Dun Mountain Trail, Nelson / 38 km / 4-6 hours

⁶⁰ <https://www.mbie.govt.nz/immigration-and-tourism/tourism/tourism-funding/nga-haerenga-the-new-zealand-cycle-trail/>

- Great Taste Trail, Tasman / 175 km / 1-4 days
- West Coast Wilderness Trail, West Coast / 135 km / 4 days
- St James Cycle Trail, Canterbury / 64 km / 1-2 days
- Alps 2 Ocean, Canterbury to Otago / 64 km / 1-2 days
- Otago Central Rail Trail, Otago / 150 km / 1-5 days
- Roxburgh Gorge Trail, Otago / 34 km / 1 day
- Clutha Gold Trail, Otago / 75 km / 2 days
- The Queenstown Trail, Southern Lakes / 99 km / 1-3 days
- Around the Mountains, Otago to Southland / 175 km / 1-3 days
- Remutaka Cycle Trail, Wellington / 114 km / 1-4 days
- Old Ghost Road, West Coast / 85 km / 2-4 days
- Little River Trail, Christchurch / 50 km / 1 day

In 2013, the Great Rides experienced 56% average growth, with an estimated 97,000 trail users during the month of January alone. Reports show more than 1,200 jobs have been created and the trails are boosting regional economies.⁶¹



⁶¹ <https://www.nzcycletrail.com/about/history/>

Case Study: The Timber Trail, Central North Island, New Zealand



The Department of Conservation's concept of a cycle trail through Pureora Forest Park was agreed to in 2010. The trail starts in the old forestry village and heads south along disused logging roads and through mature forests to the farmland and village of Ongarue. New bridges and basic facilities such as toilets and signage were constructed. The total cost was NZD\$5 million.

The business case for the trail estimated 4,000 overnight visitors and 3,000 day visitors by Year 5, with a caveat that accommodation was provided at the midway point.

The trail opened in March 2013 and within a year 3,000 cyclists were using it, many riding it in a single day due to a lack of accommodation. The trail immediately received excellent reviews as the best 1-2 day remote mountain bike Great Ride in New Zealand.

The constraint to growth in the markets was accommodation on the trail. Whilst accommodation at the start and end was developed and camping was available, it took time for the private sector to commit to building a lodge. In early 2017, a 50-bed dedicated trail lodge was opened (Timber Trail Lodge).

Shared and ensuite rooms, a licensed restaurant and dedicated cycle touring facilities were provided. The lodge was initiated by local investors who received some financial assistance from a Ministry of Business, Innovation and Employment private sector support programme, the now abandoned Tourism Growth Partnership Fund. The total lodge build cost NZD\$3.5 million, with the NZ Government grant contributing one-third of this.

The development of the accommodation complemented a range of local transport and bike hire providers. There are now 4 significant providers surrounding the trail. There has also been the rejuvenation of the villages at the start and finish of the trail with the development of cafes and other accommodation. A proposed serviced camping operation was consented and due to open in the 2018-2019 season.

The users of the trail were initially serious mountain bikers from the main North Island cities of Wellington and Auckland) who would do the trip in one day. This market stimulated the growth of the transport providers. The providers also offered transport from the trail at the halfway point to nearby accommodation, and this grew the market for a 2 day option with accommodation.

The market shifted and expanded to include the older (60-70 years) and family groups. The markets now predominantly come from throughout New Zealand and there are strong emerging markets from Australia and Europe. Specialised bike tour operators are making their presence felt and the current 10% overseas market share is likely to move closer to 25% within the next 5 years.

The customer profile for the Timber Trail Lodge is more varied than predicted. The assumption that the markets would be virtually all cyclists was wrong. The increase in the Timber Trail walkers has opened up the walking market and small group company retreats, and social groups are a strong emerging market for the lodge.

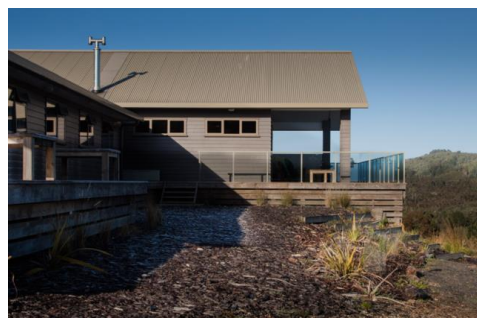
From over 3,000 visitors in the first year of the trail, growth has been solid for the first 5 years with now over 6,000 2 day riders and another 1,000+ day riders. Early market predictions for 2 day riders are up by 50%.

In the last 2 years, the Timber Trail has been incorporated into a major mountain bike event and the Te Araroa Trail, a 3,000 kilometre walk the length of New Zealand.

The impact of the trail for the local region has been regarded, both nationally and internationally, as a very successful part of the regional economic development programme.

The lessons learned from the Timber Trail development include ensuring that:

- There is a well-development business case that is confident there is a market
- The trail has legal access secured
- The trail has a governance group
- Leadership exists for the development of the concept
- There are opportunities for the public sector to support the start-up of SMEs.



APPENDIX E – TRAIL MARKETS AND THEIR PREFERENCES

MARKET	DESCRIPTION	EXPERIENCE NEEDS AND PREFERENCES
Regional Residents		
Walkers and Hikers	<ul style="list-style-type: none"> ▸ Wide range of users and ability levels including people using trails for exercise, commuting, relaxation and leisure activities. ▸ Some groups using rail trails and local paths, some seeking nature and adventure experiences in the regions National Park and reserves. 	<ul style="list-style-type: none"> ▸ Safe short trails for daily use. ▸ A range of all-ability access trails. ▸ Short to long trails for weekend leisure activities both close to population centres and within easy weekend travel from home. Appealing destinations. Linked or nearby activities, attractions and accommodation. ▸ Short to long hiking trails in a variety of locations (from near-urban to remote) at a range of difficulties. ▸ Links from accommodation hubs to areas of interest such as the Latrobe Valley, South Gippsland, East Gippsland. ▸ Accessible trailheads with adequate parking and facilities. Overnight or multi-day trails with provision for on-trail camping or hut accommodation or nearby off-trail accommodation. ▸ Regional residents often seek areas away from the busy tourism hot spots in peak periods to continue to enjoy their local area highlights. Gippsland has a wide variety of trails that can be used when some areas are busy.
Trail Runners	<ul style="list-style-type: none"> ▸ People running on trails for exercise, training for events and for adventure. 	<ul style="list-style-type: none"> ▸ Range of short and long trails in and near urban areas, parks and reserves. ▸ Challenging backcountry trails for extended running. ▸ Connected trails suitable for running events such as the Mitchel River Trail Run. ▸ Range of participative and competitive trail running events.
Cyclists (excluding mountain biking)	<ul style="list-style-type: none"> ▸ Wide range of users and ability levels including people cycling for exercise, commuting, relaxation and leisure activities and touring. 	<ul style="list-style-type: none"> ▸ Safe cycling or shared use trails for daily use. ▸ Short to long cycle trails for weekend leisure use both close to population centres and at visitor hubs within easy weekend travel from home. Appealing destinations. Linked or nearby activities, attractions and accommodation such as wineries, cafes and good food. Some may require bike hire or transport services ▸ Accessible trailheads with adequate parking and facilities such as the Gippsland Plains Rail Trail which can utilise the train as a one way travel source and then ride the return leg back to the car.
Mountain Bikers (Use of a purpose-built mountain bike on purpose-built trails, shared trails or other off-road trails.)	<ul style="list-style-type: none"> ▸ Children and families seeking a safe entry level or skills development experience. ▸ Riders in the young adult to middle age groups. ▸ Experienced local riders who have ridden for many years in the region, and who continue to contribute to the trail network through building, maintenance and other activities 	<ul style="list-style-type: none"> ▸ Trails and bike parks accessible from population centres and together offering a range of trail types. ▸ Inter-connected trail networks offering a range of difficulty levels and technical challenges. Ideally offering at least a day's riding. ▸ Skills parks and technical trails. ▸ Participative and competitive events. ▸ Trailheads with appropriate facilities including car parking, bike wash-down, food services, shuttle transport. ▸ A range of trails accessible for shorter 1 to 4 hour rides near places of work and living. Trails generally for the local user market although will travel more broadly to key trails regionally and will travel nationally for longer weekend breaks and short holidays.

MARKET	DESCRIPTION	EXPERIENCE NEEDS AND PREFERENCES
		<ul style="list-style-type: none"> ‣ Some feature rides that might include long descents, well designed and constructed features, outstanding scenery and other features. ‣ Diversity of offerings.
Horse Riders	<ul style="list-style-type: none"> ‣ Likely to be members of local horse riding clubs in the main. 	<ul style="list-style-type: none"> ‣ Bridle trails accessible from horse agistment areas/ equestrian centres or with adequate horse trailer parking and unloading facilities. ‣ Some further dedicated bridle trails with the appropriate facilities.
Domestic Visitors		
General Visitors	<ul style="list-style-type: none"> ‣ People on a holiday or visiting friends and relations. ‣ For Gippsland, this is likely to be shorter easy to access trails such as day walks near the Sydney Melbourne Touring Route, or close to the Noojee area where day trippers can experience easy walk experiences. 	<ul style="list-style-type: none"> ‣ Trails of different types to or at points of interest suited to a range of abilities. ‣ Something different to do while on holiday. ‣ Equipment and bike hire. ‣ Short guided tours. ‣ Easily available information and packaged tours/product to provide the experience in an easily accessible way. ‣ Picnic and toilet facilities close to the trail so that the stop can be an enjoyable one and made easy for them.
Soft Adventure	<ul style="list-style-type: none"> ‣ Families, adult couples and retired people seeking trail activities of one or more day's induration. ‣ Some may visit the region specifically to undertake a particular trail. ‣ This will generally occur on trails that are more widely used and offer a 'safer' entry into trail use 	<ul style="list-style-type: none"> ‣ Hiking and cycle trails packaged for journeys of one or more days. ‣ Guided or self-guided tours or packages, accommodation, linked activities. ‣ Mountain bike parks with variety and/or iconic rides. ‣ Transport, accessible trailhead, equipment and bike hire. ‣ Good pre-trip information and booking. ‣ Engaging, immersive interpretation. ‣ Generally good facilities nearby for food and beverage after completing the trail adventure.
Hikers	<ul style="list-style-type: none"> ‣ Self-sufficient hikers, walking clubs, youth and other social groups in a variety of ages engaging in short and long experiences. ‣ May visit the region specifically to walk a particular trail. 	<ul style="list-style-type: none"> ‣ Short to long hiking tracks at a range of difficulty levels showcasing landscapes or offering a special challenge. An example might be Lake Tarli Karng or a number of other offerings in the region. ‣ Accessible trailheads with adequate parking and facilities. Overnight or multi-day trails with provision for camping or even staying at cattleman huts or nearby off-trail accommodation. ‣ Transport and shuttles, especially for one-directional trails. ‣ Accessible track information.
Mountain Bikers	<ul style="list-style-type: none"> ‣ Riders in the young adult to middle age groups who may visit the region specifically to ride a particular trail or bike park. ‣ Club members on trips. 	<ul style="list-style-type: none"> ‣ Trail networks and bike parks that offer 2 to 3 days riding and a range of trail type and difficulty levels. ‣ Iconic and challenging rides. ‣ Multi day epic trail with support services to make experience more accessible. ‣ Trailheads with appropriate facilities including car parking, bike wash-down, food services, shuttle transport. ‣ Bike hire and repair services. ‣ Good pre-trip information and booking.

MARKET	DESCRIPTION	EXPERIENCE NEEDS AND PREFERENCES
		<ul style="list-style-type: none"> ‣ Accommodation and transport that is bike friendly, allowing for washing, storage and access to bikes.
Education Groups	<ul style="list-style-type: none"> ‣ Schools, outdoor education and youth groups from within and near the region. 	<ul style="list-style-type: none"> ‣ Guided or self-guided walking, hiking, cycling, mountain biking or horse riding experiences that offer environmental or cultural learning, outdoor skills development, challenge and team building opportunities. ‣ A range of trails will be needed suited to different ages and skills. ‣ Nearby accommodation and education facilities suited to school and youth groups. A number of educational 'camps' in Gippsland provide some basis for exploring outwards from these. Wilsons Promontory is also popular for school groups. ‣ Trails experiences may be part of longer learning products or packages. ‣ Good pre-trip information and booking. ‣ Engaging, immersive interpretation.
International Visitors		
Walking Tourists	<ul style="list-style-type: none"> ‣ Mainly visitors from USA, UK, Germany, Japan, Netherlands and New Zealand ranging in age from young adult to over 55, travelling with a partner or alone. 	<ul style="list-style-type: none"> ‣ Iconic, soft adventure walks with guided and self-guided products and packages providing accommodation and linked experiences. ‣ A range of other walking and hiking opportunities and nature-based and outdoor pursuits. ‣ Adventure activities and packages. ‣ Transport, equipment hire. ‣ Good pre-trip information and booking. ‣ Engaging, immersive interpretation and signs to assist with the feeling of safety and accessibility.
Cycle/ Mountain Biking Tourists	<ul style="list-style-type: none"> ‣ Mainly visitors from Australia, UK, USA, Germany, Canada, Netherlands aged from young adult to people in their 50's and 60's, travelling alone or with a partner. 	<ul style="list-style-type: none"> ‣ Iconic and challenging rides and trail journeys. ‣ Outstanding trail networks and bike parks that offer 2 to 3 days riding and a range of trail type and difficulty levels. ‣ Multi day epic trail with support services to make experience more accessible. ‣ Trailheads with appropriate facilities including car parking, bike wash-down, food services, shuttle transport. ‣ Bike hire and repair services. ‣ Accommodation and food and beverage appropriate for people travelling long distances for an outstanding experiences. ‣ Good pre-trip information and booking. ‣ Signature events.

APPENDIX F – GIPPSLAND TRAIL AREAS

AREA / TRAIL	PREDOMINANT LAND MANAGER	TRAIL USE	DESCRIPTION
Noojee / Neerim	DELWP, Parks Vic and Baw Baw Shire Council	Mostly short walks	<p>This area of west Gippsland boasts a number of higher quality short walks designed for use predominantly by Melbourne based day trip markets. Includes well known visitor sites such as the Trestle Bridge and the trail to Toorong Falls.</p> <p>Shorter trails for community benefit include the Rokeby Cross Over track and the trail to Neerim.</p> <p>Nearby and in the connection to the Yara Valley, the Ada Tree walk in State Forest is popular to the tree that once was Victoria's tallest.</p>
Walhalla / Mount Baw	Parks Vic, DELWP, MBBAR, Baw Baw Shire Council	A mixed collection of trails. Includes short walks, mountain biking areas, long trails and ski areas	<p>Walhalla is a visitor destination with a variety of short walks including the Cricket Ground trail. It is also the start/end of the Australian Alps Walking Track – the original and probably most well-known long-distance rail in Australia.</p> <p>Mount Baw Baw Alpine Resort and Baw Baw National Park are home to ski trails, shorter and longer walks and mountain biking.</p>
Erica Rawson	DELWP, Baw Baw Shire Council, Parks	Mountain Biking	Erica hosts a smaller mountain biking area frequented by predominantly local and regional visitors.
Mount Worth State Park	Parks Vic	Walking	A series of short walks radiate from the Moonlight Creek car park and picnic area. Predominantly local users.
Morwell NP	Parks Vic	Walking	Short walks to immerse visitors into the forest and gullies in the area. Use primarily by local and regional visitors.
Tarra Bulga NP	Parks Vic	Walking	A series of well-designed and maintained short walks offering high quality access to the tall forests of the Strzelecki Ranges. Caters to visitors from all markets and the area includes picnic facilities, toilets and car parks.
Phillip Island	Phillip Island Nature Park, DELWP, South Gippsland Council, Parks Vic	Various	Includes the very popular Cape Woolamai walks, and the main trail linking Cowes and the beaches to the south and west on the Island. Walks around the Nature Park are also popular.

AREA / TRAIL	PREDOMINANT LAND MANAGER	TRAIL USE	DESCRIPTION
The Bass Coast and Cape Liptrap	Parks Vic, Bass Coast Council	Various mostly walking	Includes the George Bass Coastal Walk – a spectacular walk along cliffs and coastal vegetation and the Point Smythe walk further south near Inverloch. The area also includes other shorter walks that are popular with local and regional visitors.
Bass Coast Rail Trail	Bass Coast Council	Multiple Use	The trail is a very popular trail and includes the Kilcunda Trestle Bridge. The rail trail includes Wonthaggi and through in the west to Wolamai Racetrack. Possible extensions to the north west would include a future link to the Great Southern Rail Trail.
Foster / Cement Hill	Parks Vic, South Gippsland Council	Mountain Biking	A regionally significant mountain bike recreation area that offers a strong intermediate trail offer close to Foster.
Great Southern Rail Trail	South Gippsland and Wellington Councils	Multiple Use	A very well-known and well used rail trail from Leongatha in south Gippsland to Port Welshpool. Extensions at either end of the trail are being considered and planned for at present. The trail passes through many small towns and has potential to assist in the development of trail related businesses. The trail caters for visitors and local communities with sections being used locally.
Wilson Promontory	Parks Vic	Various	Wilson's Promontory is one of Victoria's best-known walking destinations. It offers a range of trails from easy short walks along the beaches and coastal headlands, to longer walks that can be remote and challenging. The remote and natural areas in the northern and eastern areas of the Prom offer wilderness walks, while the Tidal River area is often crowded and with well-formed easy nature trails including the Loo-ern Boardwalk. The Circuit Track and access to the Lighthouse in the southern areas is very popular and serviced campsites including water and toilets are available to book.
90 Mile Beach	DELWP, Wellington and East Gippsland Shire Councils	Shorter Walks	Includes short walks in the fishing villages and small towns of Nooramunga Coastal Park and the 90 Mile Beach. Includes the Port Welshpool Long Jetty, the Old Port Trail at Port Albert and the McLaughlins Beach boardwalk.
Sale Wetlands	Wellington Shire Council, Parks Vic	Multiple Use and Walks	The Sale Wetlands offer outstanding bird life, wetlands walks on boardwalks and multiple use trails. The Lake Guthridge walk is popular with community for outdoor activity.
Latrobe Valley	Latrobe City Council	Multiple Use Trails	Extensions of trails is occurring to link the Latrobe Valleys main population centres of Traralgon, Moe and Morwell. The trails offer community access to services and infrastructure, activating exercise opportunities and further connections for businesses.

AREA / TRAIL	PREDOMINANT LAND MANAGER	TRAIL USE	DESCRIPTION
			In addition the Moe Yallourn Rail Trail is a popular trail linking communities and providing for local use and recreation.
Warragul / Drouin	Baw Baw Shire Council	Multiple Use Trails	The Two Towns Trail links Drouin and Warragul and is an important piece of community infrastructure. It provides connectivity between the two main population centres of Baw Baw Council and also provides a spine for potential growth of the trail connectivity.
Strzelecki Ranges	DELWP, Council, Parks Victoria	Multiple Trails for multiple users	Includes the Grand Strzelecki Trail and the Grand Ridge Rail Trail. Both are managed for multiple users and the Grand Ridge Rail Trail has received investment in recent times including new bridges. The Grand Strzelecki Trail is at times affected by logging and some parts of the trail require maintenance but a strong local connection and the Association that was created helps fund and implement maintenance on the trail.
Central Gippsland Mtn Biking	Latrobe City Council	Mountain Biking	Haunted Hills MTB Park is under development at the time of writing this study, the Gippsland Mountain Bike Club will manage the site and it will include over 15 kilometres of trails designed for all levels of riding, while aimed as an introduction to riding in Gippsland. Other trail parks include Glengarry North and Maryvale Pines trails which have strong local and regional offerings.
Gippsland Plains Rail Trail	Latrobe City Council and Gippsland Plains Rail Trail Committee of Management	Multiple Use	A premier rail trail traversing the Gippsland Plains linking Traralgon and Stratford. The trail passes through small towns and is well utilised as a day trip with people able to catch a train one way and ride one way. The trail is also used as a community resource for many of the smaller towns. Some sections remain on or near roads and further works are planned.
Southern Alps	Parks Vic, DELWP, East Gippsland and Wellington Councils	Various	A range of short to medium walks existing the southern foothills of the Alps north of Licola and Dargo. Includes some well-known walks such as Lake Tarli Karng, and elements of the Bicentennial Trail. A range of shorter walks also exists including day walks to mountains such as the Crinoline and many of the mountain huts and waterfalls in the area. This includes Bryces Gorge trail and Guys Hut walks.
Mitchell River NP	Parks Victoria	Walking	A number of well-known walks including the culturally significant Den of Nargun Track and circuit track, as well as the 18 km Mitchell River trail.

AREA / TRAIL	PREDOMINANT LAND MANAGER	TRAIL USE	DESCRIPTION
Blores Hill	Parks Vic and Gipps Mtn Bike Club	Mtn Biking	A mountain bike park near Lake Glenmaggie offering a strong trail network and expanding number of trails. Holds regional events and is of regional significance.
Mt Taylor just north of Bairnsdale	DELWP	Mtn Biking	Strong regional and local offering of trails for mountain biking. Includes a hard-downhill trail for experienced users.
Colquhoun and Nowa Nowa	Parks Vic and DELWP	Mtn Biking and Walks	Two separate mountain bike parks in relatively close proximity although offering different trails for riders. Both are popular and have varying degrees of infrastructure. Separate walking trails around the Nowa Nowa Arm provide a strong walking opportunity along 12 kms of trail. Facilities exist.
East Gippsland Rail Trail	East Gippsland Shire Council, DELWP and others	Multiple Use	94 kilometres of rail trail stretching from Bairnsdale to Orbost. Sections are well maintained and have been the recipient of a recent grant to upgrade the surface. Other sections provide long forest and gravel surfaced riding closer to the eastern end of the trail.
Lakes Entrance	East Gippsland Shire Council DELWP	Multiple Trails for Multiple Use	The trail offering includes the very popular Lakes Entrance Walk to the entrance of the Lakes along coastal foreshores. Other walks include the proposed new trail around Cunningham Arm and near Kalimna Wharf. Lakes Entrance Discovery Trail connects Lakes Entrance with the East Gippsland Rail Trail with recent work ensuring the standard and accessibility of the trail matches the rail trail through to Lakes Entrance.
Omeo and Oriental Claims	Parks Vic and DELWP	Multiple Use	Oriental Claims has a number of walking tracks through the old mining and diggings areas. Omeo is also seeking to develop a significant mountain bike park with detailed planning under way.
Princes Highway East Day Walks	Parks Vic, DELWP	Walks	A number of important short walks on the Princes Highway offering travellers an opportunity to stop while on the highway and enjoy the areas nature. These include the McKenzie River Rainforest Walk, Genoa Peak climb (near Mallacoota) and other nearby walks and Raymond Creek Walk near Orbost.
Cape Conran	Parks Vic	Walks	The Cape Conran Nature Trail offers a strong regional offer for visitors to the area as well as locals and nearby residents. Passes through Coastal heathland and forests.

AREA / TRAIL	PREDOMINANT LAND MANAGER	TRAIL USE	DESCRIPTION
Mallacoota	Various	Walks	Mallacoota offers a number of short walks including the start of the Wilderness Coast Walk through the foreshore of Mallacoota Inlet and Bass Straight. Nearby Genoa Peak is a good climb with outstanding views from the top. Accessing the Cape Howe wilderness walks is via Mallacoota and the Inlet.
East Gippsland Forests	Parks Vic, Various	Walks	A general description for a number of walks in the East Gippsland High Country. Includes the Erinunderra Rainforest Walk and the Snowy River Gorge Walks. Mostly remote from the main touring routes but offering a high-quality experience.
Wilderness Coast Walk	Parks Victoria	Long Distance Walk	One of Victoria's icon walks that offers a strong wilderness experience with self-reliance required. Generally, people walk from Cape Conran to Mallacoota or vice versa although shorter sections are available for walkers by accessing the coast via Wingan Inlet, or Point Hicks.
Australian Alps Walking Track	Parks Vic	Long Distance Walk	Australia's most well-known long-distance walking track traversing the Australian Alps and Great Divide from Walhalla in the south to Canberra in the north. Very few people walk the entire track in one effort – with some sections being very popular and walked by tens of thousands of people a year and others by only several dozen.
Raymond Island Koala Walk	DELWP, East Gippsland Shire Council, Parks Vic	Short Walk	A small community driven trail that provides visitors access to viewing Koalas in their native habitat.

APPENDIX G – TRAVEL TO GREATER GIPPSLAND REGION AND SUB-REGIONS YEAR END MARCH 2019

	Visitors ('000)	YE Mar 09	YE Mar 10	YE Mar 11	YE Mar 12	YE Mar 13	YE Mar 14	YE Mar 15	YE Mar 16	YE Mar 17	YE Mar 18	YE Mar 19	Change on last year	Overall change	Share of regional Victoria	% pts change on last year	
Greater Gippsland region	International overnight	54	59	61	58	47	61	62	73	81	77	92	20.6%	71.2%	15.7%	1.1	
	Domestic overnight	1,585	1,652	1,753	1,744	1,748	1,902	1,894	2,013	2,097	2,375	2,488	4.7%	58.8%	14.0%	-0.7	
	Domestic daytrip	3,209	2,755	3,308	3,225	3,513	3,219	3,708	3,880	4,082	3,891	4,485	15.3%	39.8%	11.8%	0.8	
	Total	4,847	4,466	5,122	5,027	5,309	5,182	5,452	5,966	6,240	6,342	7,063	11.4%	48.7%	12.4%	0.2	
	Nights ('000)																
	International	486	522	462	699	444	640	862	657	653	802	787	787	-4.3%	57.8%	9.3%	-1.0
	Domestic	4,539	5,441	5,422	5,148	5,528	5,856	5,082	5,916	6,069	6,405	6,994	9.2%	54.1%	14.2%	-0.3	
	Total	5,025	5,963	5,884	5,846	5,972	6,296	5,944	6,573	6,722	7,207	7,781	7.7%	54.4%	13.5%	-0.4	
	East Gippsland	International overnight	31	35	33	31	24	30	29	33	43	39	49	27.1%	59.4%	8.3%	1.0
		Domestic overnight	547	573	654	561	686	620	586	711	692	787	856	8.7%	56.3%	4.8%	-0.1
Domestic daytrip		509	526	589	530	538	464	555	378	512	590	562	0.3%	16.3%	1.5%	-0.1	
Total		1,087	1,134	1,276	1,122	1,248	1,114	1,170	1,123	1,247	1,416	1,466	5.7%	37.7%	2.6%	-0.1	
Nights ('000)																	
International		119	113	124	139	106	188	130	205	122	208	204	np	np	2.5%	-0.2	
Domestic		1,675	2,152	2,222	1,768	2,523	1,962	1,774	2,310	1,959	2,268	2,821	24.4%	68.4%	5.7%	0.6	
Total		1,794	2,265	2,346	1,908	2,630	2,148	1,905	2,515	2,081	2,474	3,025	22.3%	68.6%	5.3%	0.5	
Wellington		International overnight	7	9	10	8	7	11	11	11	9	11	9	-23.5%	26.0%	1.4%	-0.7
		Domestic overnight	244	255	269	283	258	350	275	300	360	362	315	-12.8%	29.1%	1.8%	-0.5
	Domestic daytrip	572	547	515	358	497	448	522	633	678	516	808	56.8%	41.3%	2.1%	0.6	
	Total	823	812	794	649	762	809	807	943	1,047	888	1,132	27.4%	37.5%	2.0%	0.3	
	Nights ('000)																
	International	64	77	97	99	91	132	222	118	120	122	85	np	np	1.0%	-0.5	
	Domestic	680	647	769	782	744	1,002	784	860	1,091	991	854	-13.8%	25.6%	1.7%	-0.5	
	Total	744	726	867	881	834	1,135	1,006	978	1,211	1,113	939	-15.6%	np	1.6%	-0.5	
	Latrobe	International overnight	6	7	7	8	4	6	5	5	7	7	10	49.0%	56.7%	1.7%	0.4
		Domestic overnight	164	156	148	145	225	175	175	171	242	254	256	0.8%	55.6%	1.4%	-0.1
Domestic daytrip		618	562	647	856	807	724	798	961	931	880	816	-7.3%	32.0%	2.1%	-0.4	
Total		788	725	802	1,009	1,036	905	978	1,137	1,180	1,140	1,081	-5.2%	37.1%	1.9%	-0.3	
Nights ('000)																	
International		199	127	59	200	66	75	141	58	133	158	208	np	np	2.5%	0.5	
Domestic		458	714	418	304	473	374	463	454	523	537	535	-0.3%	np	1.1%	-0.1	
Total		657	841	476	503	539	449	605	510	656	692	741	np	np	1.3%	0.0	

Estimates in red and highlighted in pink are below the data confidence intervals used by TEVE.

Note: share and change analysis should not be undertaken on estimates below the data confidence intervals.

	Visitors ('000)	YE Mar 09	YE Mar 10	YE Mar 11	YE Mar 12	YE Mar 13	YE Mar 14	YE Mar 15	YE Mar 16	YE Mar 17	YE Mar 18	YE Mar 19	Change on last year	Overall change	Share of regional Victoria	% pts change on last year	
Baw Baw	International overnight	2	5	6	3	3	4	6	6	6	7	7	-0.6%	np	1.2%	-0.2	
	Domestic overnight	120	123	149	188	159	175	142	191	195	232	257	10.8%	113.6%	1.4%	0.0	
	Domestic daytrip	695	330	553	599	609	626	774	709	783	746	988	32.4%	42.2%	2.6%	0.4	
	Total	817	458	707	800	771	805	922	906	984	985	1,252	27.1%	53.2%	2.2%	0.3	
	Nights ('000)																
	International	31	56	102	101	86	52	184	120	86	160	98	np	np	1.2%	-0.9	
	Domestic	275	277	354	493	290	439	292	396	457	496	517	np	np	1.0%	-0.1	
Total	306	333	456	594	356	491	476	516	544	655	615	np	np	1.1%	-0.2		
South Gippsland	International overnight	11	15	16	12	14	18	14	23	25	23	24	2.6%	116.7%	4.1%	-0.4	
	Domestic overnight	265	312	317	278	302	336	324	378	351	470	421	-10.4%	59.0%	2.4%	-0.5	
	Domestic daytrip	409	299	537	491	455	513	612	535	573	534	627	17.3%	53.3%	1.6%	0.1	
	Total	685	626	870	781	771	866	950	936	949	1,026	1,072	4.3%	66.5%	1.9%	-0.1	
	Nights ('000)																
	International	43	130	59	63	59	163	110	81	140	112	92	np	np	1.1%	-0.3	
	Domestic	652	932	868	817	909	852	1,027	1,024	960	1,147	1,023	-10.8%	56.8%	2.1%	-0.5	
Total	695	1,061	925	880	969	1,015	1,137	1,105	1,100	1,259	1,115	-11.4%	np	1.9%	-0.5		
Wonthaggi - Inverloch	International overnight	5	4	3	3	3	4	6	6	6	6	10	78.4%	np	1.7%	0.6	
	Domestic overnight	234	231	246	300	190	305	251	288	305	321	402	25.3%	72.1%	2.3%	0.3	
	Domestic daytrip	341	321	467	391	576	414	421	598	504	560	498	-11.5%	45.5%	1.3%	-0.3	
	Total	579	556	716	694	769	724	679	892	815	887	908	2.4%	56.8%	1.6%	-0.1	
	Nights ('000)																
	International	22	15	10	91	25	13	70	50	45	33	67	np	np	0.8%	0.4	
	Domestic	637	587	785	938	589	1,017	726	816	986	855	1,062	27.8%	71.5%	2.2%	0.3	
Total	659	602	795	1,029	613	1,029	795	866	1,031	887	1,159	30.6%	np	2.0%	0.3		
Regional Victoria	International overnight	326	313	337	338	324	361	405	469	519	525	588	12.0%	80.6%			
	Domestic overnight	10,381	10,505	10,563	11,533	11,338	12,115	12,692	13,777	14,577	16,172	17,778	9.9%	71.3%			
	Domestic daytrip	23,211	24,837	25,037	28,508	27,493	26,962	28,118	30,346	32,850	35,431	36,723	9.3%	66.8%			
	Total	33,918	35,655	35,938	40,379	39,156	39,437	41,215	44,592	47,947	52,129	57,000	9.5%	68.3%			
	Nights ('000)																
	International	4,288	5,002	4,668	5,449	5,166	5,738	6,791	6,586	7,893	7,764	8,245	6.2%	92.3%			
	Domestic	31,046	32,822	32,548	35,586	35,036	35,942	36,870	39,820	41,135	44,260	49,289	11.4%	58.8%			
Total	35,333	37,824	37,216	41,035	40,204	41,680	43,661	46,406	49,028	52,025	57,533	10.6%	62.8%				

Estimates in red and highlighted in pink are below the data confidence intervals used by TEVE.

Note: share and change analysis should not be undertaken on estimates below the data confidence intervals.

APPENDIX H – TOP ACTIVITIES PARTICIPATED IN BY VICTORIANS 2018

The table below shows that during the year ending June 2018 walking, cycling and bushwalking were 3 of the top 8 activities that Victorian's participated in.

Top 15 activities	Participation by activity (adults)	Total (estimate 000s)
1	Walking (Recreational)	2,276.8
2	Fitness/Gym	1,785.0
3	Athletics, track and field (includes jogging and running)	785.8
4	Swimming	708.6
5	Cycling	630.1
6	Golf	279.1
7	Yoga	273.2
8	Bush walking	260.7
9	Tennis	231.4
10	Basketball	229.9
11	Australian football	199.9
12	Pilates	197.6
13	Football/soccer	189.5
14	Cricket	151.7
15	Netball	146.3



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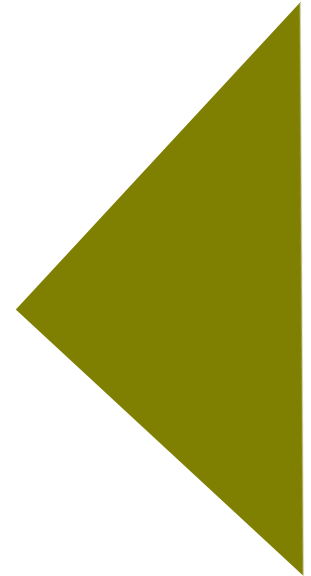


The 'Gippsland Trail'

FEASIBILITY STUDY AND BUSINESS CASE

July 2020





This report was prepared by TRC Tourism for Destination Gippsland Ltd in relation to the development of the Gippsland Trail Feasibility Study.

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Executive Summary

Project Brief and Description

TRC Tourism has been engaged by Destination Gippsland and a stakeholder group comprising the 6 local governments of Gippsland to undertake a business case and feasibility assessment of the Gippsland Trail. The Gippsland Trail concept is an exciting multi-layered trail that traverses the length and breadth of Gippsland.

The trail's genesis is the foundation report 'Gippsland Tracks and Trails Feasibility Study'. The study completed in 2019 by TRC Tourism recommended a range of actions and experience developments based on criteria to determine the region's Signature Trails. Signature Trails are those that can or could significantly increase visitation to the region.

The study found that:

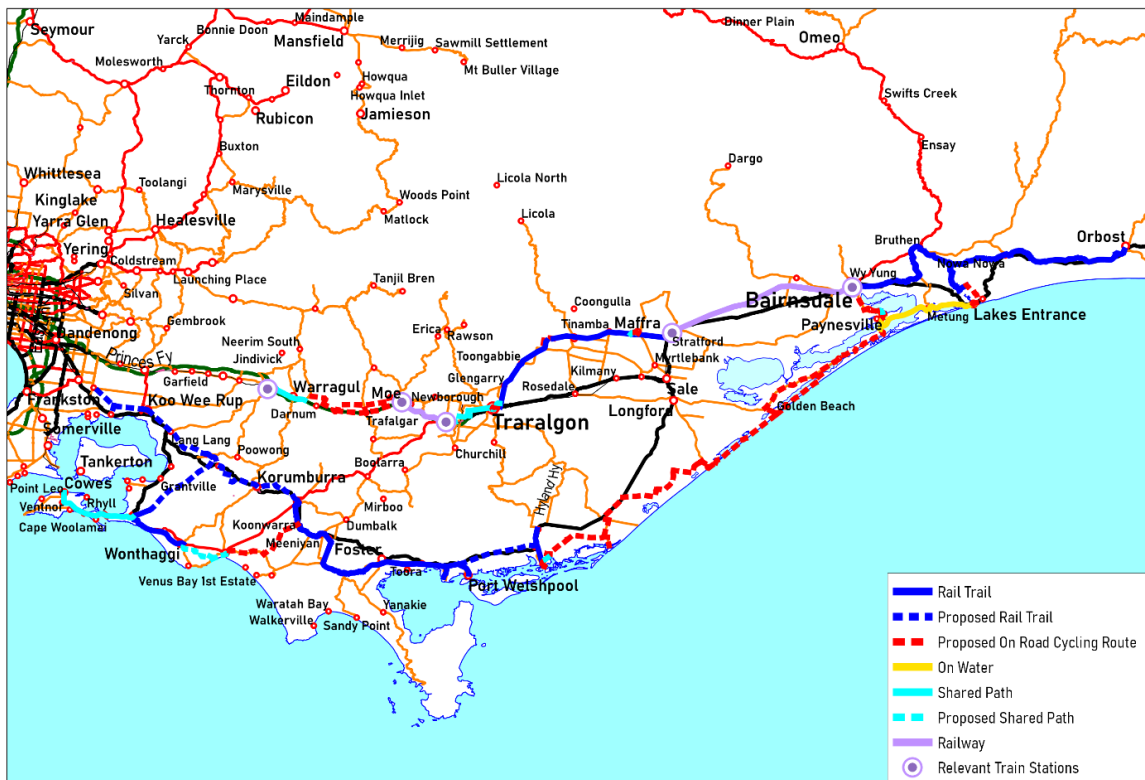
- The creation of a multipurpose trail that contains elements of many of the existing trails – but is marketed as the 'Gippsland Trail' or 'Great Gippsland Trail' will provide a trail of State-wide significance
- The trail will have several 'contained' experiences that can be enjoyed in sections – and these sections will generally align with the existing trail network (i.e. Great Southern Rail Trail)
- The trail could have several longer routes promoted as 'bike-packing' routes that would enable riders the option of longer journeys through Gippsland.

The Concept

The proposed route travels over 700 kilometres through Gippsland, starting in the west at Clyde just on the outskirts of Melbourne or at the Drouin Station on the Gippsland rail line. With options along the route, and some sections including public transport, the trail covers the length and breadth of Gippsland and includes outstanding experiences, scenery and a number of communities.

The figure below provides the overview map of the proposed trail.

Figure 1. Overview of the Proposed Gippsland Trail



The sections in blue (dark blue representing rail trails and light blue representing off road shared paths) utilise existing multi-use trails such as the East Gippsland Rail Trail and the Great Southern Rail Trail.

The sections shown on the map above in red are proposed to be linkages designed specifically for bike packing and local and regional use using the generally quieter sections of Council or State roads where no other options appear to be feasible.

The sections in purple are those where it is proposed to recommend using public transport. On road options do exist but are generally along sections of highway or road where the experience does not warrant the time and effort involved, or where significant route or safety issues may exist.

The yellow section represents an innovative element to the trail and one that is also an opportunity for business, with the development of a water based transport option. This is most likely to be an existing water taxi service that may expand its operation. The linkage on water, while weather dependant, and most likely a seasonal offering, will add to the trail's overall experience on offer.

While all of the elements come to approximately 700 kilometres, it is unlikely that the entire trail will be cycled or used in one visit with perhaps the exception of the bikepacker market (an element of that market may spend 2 weeks undertaking the entire trip).

Advantages of the proposed trail include:

- Provides a single 'spine' route through and around the majority of Gippsland
- Provides access to the public transport network at both Clyde and at Drouin (trail heads)
- Doubles as a foundation piece of infrastructure for communities for recreation, health and connectivity
- Provides different experiences for different markets that can be packaged together or had separately
- Does not lose the connection to trail history and community
- Provides links into Phillip Island and the trails that connect Cowes and San Remo
- Activates many areas that are currently 'off the beaten track' for visitors
- Provides very strong economic outcomes for Gippsland including the opportunity to develop a trails based industry.

Several issues however need further resolution. These are:

- Safety concerns for riders using the busy Inverloch to Venus Bay Road and The South Gippsland Highway need further consideration into off road routes. This study has not been able to determine an off-road corridor and while it is acknowledged that cyclists currently use these roads, it is not ideal to promote them given the high vehicle passes per day and the likelihood of heavy vehicles and machinery using the roads.
- The use of public transport between Morwell and Moe. This is considered a temporary solution until further investigations can determine an off-road trail. The M1 Freeway intersects with several options as does the Melbourne to Gippsland rail corridor.
- The most effective governance arrangements. While this trail can be looked at in isolation, and a general recommendation made that an MOU best suits the type of trail, the intersection of this with the proposed G7 and the proposed Baw Baw Epic Adventure Trail provide further opportunity to create a unique and innovative solution between the partners and stakeholders to drive not only the good governance of this trail, but also the management of other Signature Trails in Gippsland.

Economic Considerations

The modelling is based on estimates of annual uses/ users of the trails and other assumptions utilised in quantifying spending in the region.

The trail's development and connections will generate substantial positive economic benefits for the Gippsland Region, during the construction phase and in the operations phase.

To assist decision makers in understanding the costs and benefits of the trail, the data is presented in 2 components – the Gippsland only components of the trail (construction and costs) and the entire trail including sections outside Gippsland (construction and costs).

Trail Use & Regional Spending

Rides on the trails are projected to increase from 123,600 in Year 1 to around 227,000 in year 10.

The combination of user numbers by type, average spending and average length of stay is used to estimate annual spending (in constant 2020 dollars) in the region. Spending in the region by trail users increases from \$11.045 million in year 1 to \$20.305 million in year 10.

A separate user category (Bike Packers) was also examined (7-day rides and 14-day rides). Total spending of this segment is estimated at \$2.429 million in year 1 and increasing to \$4.694 million in year 10.

Construction Phase Jobs

For the Gippsland sections of the trails, a total of 170.1 FTE jobs (141.7 direct jobs and 28.3 indirect/induced jobs) would be generated during the construction period. The direct jobs comprise 111.2 jobs in on-site construction and 30.6 jobs in materials/equipment supply.¹

Operations Phase Jobs

The ongoing growth in user numbers will support an increasing number of jobs in the region.

The operation of the trails would generate a total of 57.5 direct full-time equivalent jobs in year 1, increasing to 105.7 direct FTE jobs in Year 10.

Total jobs (direct and indirect/induced) are 69.0 FTE in year 1 increasing to 124.8 in year 10.

Of the total jobs in year 10, day visitors would account for 27.4 FTE jobs, overnight visitors for 97.4 FTE jobs.

On a sector basis, the jobs (FTE- direct and indirect) generated by trail users are mainly concentrated in:

- accommodation
- food and beverage
- recreational services and other visitor services
- transport (including shuttles)
- other retail.

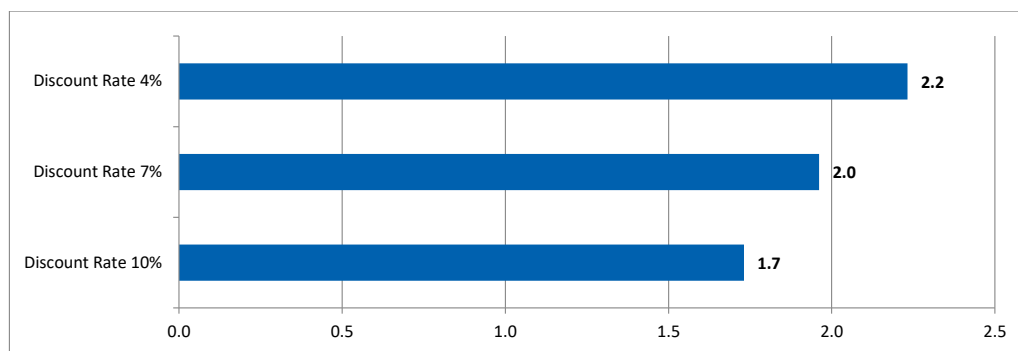
The bike packers would generate a significant number of additional jobs. Total jobs in the region increase from 14.8 FTE in year 1 to 27.3 jobs in year 10 as this market develops. Most of the jobs generated would be in accommodation, food services and other retail. This is in part due to the length of stay assumed for the user category.

¹ Rounding of numbers may lead to what appears to be addition errors.

Benefit/Cost Analysis

The chart below compares Benefit Cost Ratios (BCR) for the 3 discount rates. For a trail project a 7% discount rate is appropriate, and the project yields a positive BCR of 2.0. The present value of total benefits (\$103.929 million) generated by the investment are 2 times the total costs of the project (\$52.891 million) over a 10-year period.

Figure 2. Benefit Cost Ratio (BCR) Gippsland Component – Gippsland trail development



Source: MCA modelling & estimates, June 2020

Summary

TRC Tourism has researched the current markets in Gippsland, and undertaken consultation with Councils and land managers regarding the concept. TRC Tourism has also considered the strategic framework for Gippsland including the recommendations contained within the Destination Management Plan (2019) and the Gippsland Trails Feasibility Study (2019) and undertaken a detailed cost and benefits assessment of the proposed route.

TRC Tourism has undertaken an extensive survey of the proposed route for the Gippsland Trail. It has developed the concept in line with the recommendations contained in the Gippsland Tracks and Trails Feasibility Study and found that the concept is achievable and presents an exciting opportunity for Gippsland to be recognised as a trails destination nationally and internationally.

This study presents a strong economic case for the trail's ongoing development that can be staged over a period of years. The benefits outweigh the costs by a factor of 2 to 1.

1. Project Background

TRC Tourism was engaged by Destination Gippsland Ltd on behalf of a partnership including the local governments of Gippsland to undertake a feasibility study and initial business case to investigate whether the concept of a multi-day multi-destination ‘Gippsland Trail’ provides economic, social and health benefits to the Gippsland community.

The concept to be tested in this study includes ‘linking’ existing rail trails and off-road shared pathways in Gippsland, building on the already strong suite of trails. The existing trails each have their own separate identity and ‘brand’ with some being more effective than others. This study aims to:

- outline the demands and strategic impetus for defining and developing a nationally significant cycle/multi use trail that connects to the outer Melbourne Metro Rail system, and provides a very significant opportunity to develop experiences Gippsland wide
- identify and understand the existing rail trails and off-road shared paths that exist
- describe potential user markets and economic implications of the proposed trail concept
- consider ongoing management, maintenance, and governance requirements
- deliver recommendations that provide decision makers with critical information to make decisions regarding the feasibility of progressing the proposed long-distance trail development.

The concept began through the process of developing the Gippsland Tracks and Trails Feasibility Study.² Existing off-road shared trails (including rail trails) were identified and the potential route for the linkages was very broadly defined.

In considering the development of a Gippsland Trail, TRC has assessed the feasibility and viability according to critical factors:

- creation of the best possible and most appropriate user experience on the entire trail and the various logical ‘sections’ that may exist
- best possible use of existing trail infrastructure
- reflection of and integration with existing studies into the trails including economic feasibility assessments of the South Gippsland, Bass Coast and Wellington Shire Councils, and the recent strategic plan into the East Gippsland Rail Trail and Baw Baw cycling opportunities as well as work undertaken by Latrobe City
- environmental and sustainability considerations (high level only)
- different experiences according to intended markets and relative to each other
- attractiveness to market segments and product mix across the various components and the whole trail
- improvements required to meet user market expectations
- linking of tourism nodes and amenities
- linking of townships with a view to the best economic and best business stimulus outcomes as well as providing community connectedness
- understanding the appetite for investment post COVID and post bushfire (East Gippsland) and the drivers for the creation of a trails-based industry in Gippsland.

² Gippsland Tracks and Trails Feasibility Study 2019. TRC Tourism.

Gippsland Tracks and Trails Feasibility Study

The vision for trails in Gippsland is:

‘Gippsland will be recognised as a world-class trails destination offering a diversity of outstanding landscapes and experiences’

To achieve the vision, recommendations were made under six (6) themes:

1. **Effective coordination**
2. **Consistent and collaborative planning**
3. **Delivering trail experiences**
4. **Sustainable management**
5. **Supporting trail use and community involvement**
6. **Marketing and communication.**

Within theme 6, several recommendations were made regarding the development of trails-based experiences.

The Gippsland Trail Feasibility Study is the result of recommendations made in the *Gippsland Tracks and Trails Feasibility Study (2019)*³ under the section ‘Signature Trails – Multi-Use Trails’.

Signature Trails are defined in the report as ‘a smaller number of trails that showcase the region and offer outstanding experiences attracting people to Gippsland’. Other importance trails are listed in the hierarchy of trails important to the visitor economy as Regionally Significant or Locally Significant.

To ensure the desired outcomes, any trail development should meet set criteria:

- Designed as the highest quality experience of nature and culture
- The best trail of its type
- Feature the highest-quality infrastructure fit for purpose
- Low impact on the environment
- Accessible to target markets for Gippsland and for ex-region trail visitors
- Be supported by high quality information – from pre-trip to post-trip follow up
- Be environmentally and culturally sustainable
- Be supported by effective management and good coordination within community
- Designed with good ongoing financial and fund-stream modelling
- Have a brand and reputation aligned to the target user and be well positioned in the market
- Able to deliver strong visitor number growth into Gippsland.

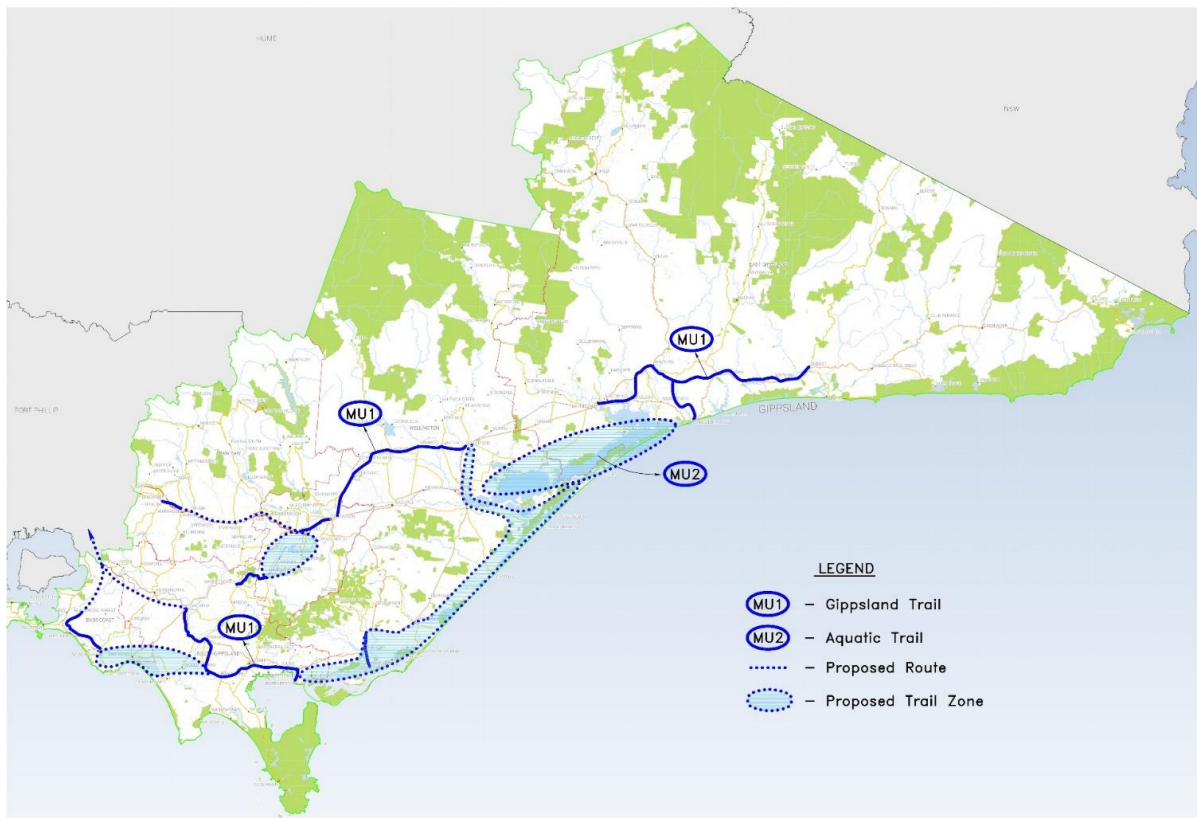
³ Gippsland Tracks and Trails Feasibility Study. 2019. TRC Tourism for Destination Gippsland and partners.

Two (2) specific multi-use trails were recommended as 'Signature Trails':

- Develop the 'Gippsland Trail'. The concept is to develop a multipurpose trail that contains elements of many of the existing trails but that can be marketed nationally and internationally as the 'Gippsland Trail'. The trail will include several 'contained' experiences that can be enjoyed in sections generally aligning with the existing trails. The trail could have several longer routes promoted as 'bike-packing' routes that would enable riders the option of longer journeys through Gippsland. The trail will have easy access to public transport including the Melbourne Metro system and the Gippsland train line through the West Gippsland, Latrobe Valley and into East Gippsland at Bairnsdale.
- The development of the Gippsland Lakes Aquatic Trail. The proposed trail would pick up some of the best elements of the Gippsland Lakes landscape including waterborne kayaking or canoeing, cycling including riding through the Lakes National Park, walking and other activities. The proposed multi-day activity could include accommodation options in villages or newer more modern options including houseboats or glamping.

The figure below provides the map of the proposed Gippsland Signature multi-use trails.

Figure 3. Gippsland Signature multi-use trails map



Source – Gippsland Tracks and Trails Feasibility Study; 2019. TRC Tourism

2. Tourism Context - Gippsland

As a visitor destination, Gippsland is one of Victoria's most important tourism regions.

The region is comprised of six Local Government Areas (LGAs): Baw Baw Shire, East Gippsland Shire, Latrobe City, South Gippsland Shire, Wellington Shire and Bass Coast, the latter being in the unusual situation of straddling two state tourism regions of Gippsland and Phillip Island.

The Gippsland region has many national parks, a rich living indigenous culture, and layers of colonial heritage. Gippsland is particularly strong in its nature-based tourism offering boasting pristine stretches of coastline, national parks showcasing alpine peaks, old growth rainforests, high country, and delicate coastal habitats.

Gippsland contains some of Victoria's most striking landscapes including Wilsons Promontory, Gippsland Lakes, Croajingolong National Park, Strzelecki Ranges, and parts of the Australian Alps. These natural assets support a diversity of activities including walking, hiking, kayaking, boating, fishing, aquatic activities, alpine sports, and cycling.

Infrastructure such as walking tracks, cycling trails, camping areas, boat launching areas, and lookouts support the visitor experience across the region. Several tourism operators also provide guided experiences in these areas.

Parts of Gippsland have the advantage of being geographically close to the urban populations of Melbourne. The region's proximity to the state capital's population base has led to a high number of day visitors and short stays. This market feature is accentuated by the absence of strong flagship products or experiences that encourage longer-stay, higher-yield visitation. The recently released Gippsland Destination Management Plan⁴ seeks to address this in part through experience development.

This highlights the importance of exploring ways of attracting higher-yield markets, addressing the challenge of seasonality, and identifying opportunities to increase length of stay for overnight visitors (both domestic and international) - markets that provide the best economic return.

The tourism economy is important for Gippsland. In the year ending 2019, the region received 6.353 million domestic (overnight and daytrip) and international overnight visitors who combined spent an estimated \$1,118 million noting the bushfires impacted these numbers towards the end of the 2019 year⁵.

Domestic overnight expenditure in Gippsland in the year ending December 2019 was estimated to be \$654 million (+10.2% year on year), with visitors spending on average \$102 per night and \$296 per visitor.

By comparison, International overnight expenditure in Gippsland was estimated to be \$38 million in the year ending December 2019, a decrease of 24.0 percent year-on-year⁶.

⁴ Gippsland Destination Management Plan 2019.

⁵ Gippsland Regional Tourism Summary Year Ending 2019. TEVE Research Published April 2020.

⁶ Gippsland Regional Tourism Summary Year Ending 2019. TEVE Research Published April 2020.

The strong domestic visitor numbers highlight the importance of the domestic visitor segments to Gippsland. This is particularly so when considering the average overnight expenditure of International visitors of \$49 as against \$102 for the domestic market.

Summary of Visitor Segments for Gippsland

A snapshot from Tourism Research Australia taken from the Destination Gippsland Management Plan (2019) provides the following breakdown in visitor segments.⁷

Table 1. Domestic day visitors to Gippsland:

REASON FOR TRAVEL	LIFECYCLE GROUP	ACTIVITIES UNDERTAKEN
<ul style="list-style-type: none"> – 50.8% holiday – 30.3% visiting friends and relatives 	<ul style="list-style-type: none"> – 52.0% older persons – 26.8% families – 11.6% midlife – 9.8% young 	<ul style="list-style-type: none"> – 26.7% undertake outdoor/nature activity – 13.3% undertake active outdoor/sports

Table 2. Domestic intrastate overnight visitors to Gippsland:

REASON FOR TRAVEL	LIFECYCLE GROUP	ACTIVITIES UNDERTAKEN
<ul style="list-style-type: none"> – 57.7% holiday – 30.8% visiting friends and relatives 	<ul style="list-style-type: none"> – 36.9% older persons – 32.5% families – 18.5% midlife – 12.1% young 	<ul style="list-style-type: none"> – 51.4% undertake outdoor/nature activity – 34.6% undertake active outdoor/sports

Table 3. Domestic interstate overnight visitors to Gippsland:

REASON FOR TRAVEL	LIFECYCLE GROUP	ACTIVITIES UNDERTAKEN
<ul style="list-style-type: none"> – 53.4% holiday – 39.7% visiting friends and relatives 	<ul style="list-style-type: none"> – 51.9% older persons – 28.5% families – 14.9% midlife – 4.6% young 	<ul style="list-style-type: none"> – 39.1% undertake outdoor/nature activity – 18.7% undertake active outdoor/sports

⁷ Gippsland Destination Management Plan. Based on TRA data 2018.

Nature-Based Tourism

Nature based tourism is important for Gippsland and for Victoria. Gippsland has an abundance of nature-based attractions and the Gippsland Destination Management Plan⁸ recognises this with experience pillars and growth strategies built around the nature-based products of Gippsland.

Around 46 million nature-based outdoor activities occurred in Victoria in 2015, including around 36 million nature-based walking, running, cycling and swimming activities in Victorian Parks.⁹ 22% of all visitors to regional Victoria participated in a nature-based experience (including both domestic and international overnight visitors, as well as domestic daytrip visitors).¹⁰

Many nature-based outdoor activities support regional economies by shifting expenditure from urban to regional towns and cities and rural areas.¹¹

\$265 million was the estimated avoided cost to the Victorian healthcare system attributable to nature-based outdoor activities in 2015.¹²

Trail related insights

The following series of points contain data taken from the Gippsland Tracks and Trails Feasibility Study.¹³ It is noted that the data was derived for the feasibility study nine months prior to this report being prepared. The data would still be relevant for a full year of trails-based tourism except for the potential impacts from the 2019 Bushfires and the COVID- 19 pandemic visitor economy shutdown that will impact figures from following years.

- Gippsland has 12.3% share of regional visitor economy (-0.2%)
- East Gippsland, Baw Baw, South Gippsland, and Wonthaggi/Inverloch all experienced growth in visitor numbers
- Only East Gippsland and Wonthaggi/Inverloch reported growth in visitor nights indicating the continued tendency for day visits to the region
- 55+ represents 37% of the market, with a continued 5% growth in this age group over the past 3 years. When you add in 50-54 age group to the 55+, nearly half the market is represented by the 50+ market (46% combined), which will need to be a consideration with regards to future trail experiences, accessibility and comfort facilities
- The even spread across the rest of the demographics (15-49) would suggest that the active family market is also an important market for the region, especially in summer school holidays (combined 46% noting that children under 15 have not been represented in visitor analysis data)
- The March quarter is a seasonal high with September and June quarters being seasonal lows indicating that there is spare servicing capacity in these periods
- The LGAs closer to Melbourne have a higher percentage of day visitors.

The VFR is a huge component of the market with 35.4% of all overnight visitors staying with friends and relatives. This has grown by an average of 9% over the last 3 years.

⁸ Gippsland Destination Management Plan. TRC for DGL 2019.

⁹ A Marsden Jacob Report. Victoria's nature-based outdoor economy. Outdoors Victoria & Sport and Recreation Victoria. Report Issued: 27.1.2016.

¹⁰ Tourism Events and Visitor Economy (TEVE) Research Unit Factsheet, January 2019. Visitors to Victoria – Experience Overview (Results for the year ending September 2018).

¹¹ A Marsden Jacob Report. Victoria's nature-based outdoor economy. Outdoors Victoria & Sport and Recreation Victoria. Report Issued: 27.1.2016.

¹² A Marsden Jacob Report. Victoria's nature-based outdoor economy. Outdoors Victoria & Sport and Recreation Victoria. Report Issued: 27.1.2016.

¹³ Gippsland Tracks and Trails Feasibility Study. 2019. TRC for South Gippsland Council and partners.

3. Trail Trends

Overview

The development of, and demand for, trails has increased globally, along with the trend for visitors to have experience-based holidays or breaks. A world-wide trend is for visitors to now seek more authentic and immersive ways to experience places and connect with the people who live there.

Providing a well-planned and thoughtfully constructed track or trail is essential to ensuring use is undertaken in a way that protects natural and cultural values, is environmentally and socially sustainable over the long-term, and offers a fun and enjoyable experience.

Gippsland's diverse and accessible landscapes provides an ideal platform from which to build stronger and more sustainable trail-based destination¹⁴.

Who Uses Trails?

Trails can cater for tourism (domestic and international travellers seeking nature-based experiences) and events attracting participants and accompanying friends/family. They also provide an outlet for residents to get outside and participate in physical activity contributing to public health, wellbeing, community and social interaction and a better liveability of a place.

The desire to experience more of a destination at a relaxed and unhurried pace is more important than ever. Advancing technologies, busy lives and time-starved people often translates to travellers opting for "slow travel". That is, they want to travel less and see more, rather than packing in as many places to visit in a short space of time as they can.¹⁵ COVID-19 presents an opportunity for destinations and trails to offer people a 'secure' outdoor holiday with smaller groups of family and friends.

As trails can be broken into smaller and more manageable sections to complete, this can also encourage visitors to stop, stay, spend, and return.

Regional Victoria and Gippsland in particular has strong positioning as a destination for spa and wellness, food and wine, touring and cycling and golf, based on a diverse range of private and public regional products and services that help drive visitation and spend.¹⁶

Wellness is a 'hook' in travel marketing as travellers seek out a healthier, more active holiday. The well-known destination of Boulder in Colorado, USA has reported that 'there are more people on our trails than ever before'.¹⁷ Participation in sport or physical recreation offers many benefits, ranging from simple enjoyment to improved health and the opportunity for social interaction.¹⁸

Many community groups and businesses are now recognising that their local trail is a substantial piece of infrastructure that they can extract more benefit from.

¹⁴ Victoria's Trails Strategy 2014-2024. Victorian Government

¹⁵ www.worldexpeditions.com/2019-adventure-travel-trends

¹⁶ Victorian Visitor Economy Strategy July 2016

¹⁷ Megatrends defining travel in 2019. Skift

¹⁸ ABS Australian Social Trends June 2011 – Sport and physical recreation

Different Types of Trail Experiences

The experiences offered to trail users will inform the type of access, materials, trail width, design, and grading. The overall trail experience will need to be carefully packaged with trail and user type at the front of mind. This includes facilities, signage, products and services and value-add activities. It is likely that there will not only be one type of user on the trails and it is important to cater for the needs of multiple user groups and user capacity where appropriate.

It is important to carefully design trails that are shared use to ensure safety and visitor enjoyment without creating conflict between users

Summary of different types of trail experiences

Walking



Walking / Hiking varies from a leisurely stroll to a more intense and strenuous hike through rugged terrain. Walking can be done for commuting or exercising with the dog in urban areas or in national parks and reserves even offering an overnight experience. Walkers undertaking a more remote activity are generally looking to immerse in nature or challenge themselves on an adventure hike.

Running



As with walking, runners can use a range of trails types in urban and hard settings to more remote and wild settings running through challenging terrain. Trail running continues to grow in popularity with new emerging trail running events occurring internationally. Trail running adventures can also include orienteering and rogaining challenges.

Cycling



Cycle users may use urban trails for commuting however, may also enjoy longer cycle trails for short breaks and weekends, independently or with family and friends. There are also cycle tourists (domestic and international) who travel from place to place with their bicycle to better explore a region.

Mountain Biking



Mountain Biking as with walkers, mountain biking applies to a range of users from beginners and family groups, to more adventurous cross-country and downhill riders. Mountain biking may be done for leisure locally or also attract major international competitions and visitors.

Horse Riding



Horse Riding users can also be categorised into short recreational riders, often undertaking a few hours ride on a weekend; endurance riders who participate in riding competitions and may use trails for training purposes; and long-distance riders who are enjoying an overnight experience or longer journey on horseback.

Sport, Recreation, and Nature-based Tourism Experiences

Trails are not just about user activities, the purpose of trail experiences is different for each user, from ensuring a healthy and active lifestyle, holiday immersion or dedicated competitive sports.

Sport and recreation

Of the Australian population aged 15 years and over, an estimated 60% (11.1 million people) reported that they had participated in sport and physical recreation at least once during the 12 months prior to the interview conducted in 2013–14.¹⁹

Of all sports or physical recreation activities, walking for exercise had the highest level of participation (23%). Swimming (7.4%), cycling (6.5%) and jogging or running (6.5%) were the only other activities that were participated in by more than one in twenty Australians.²⁰

Nature-based tourism

Around 46 million nature-based outdoor activities occurred in Victoria in 2015, including around 36 million nature-based walking, running, cycling, and swimming activities in Victorian Parks.²¹

22% of all visitors to regional Victoria participated in a nature-based experience (including both domestic and international overnight visitors, as well as domestic daytrip visitors).²²

Many nature-based outdoor activities support regional economies by shifting expenditure from urban to regional towns and cities and rural areas.²³

\$265 million was the estimated avoided cost to the Victorian healthcare system attributable to nature-based outdoor activities in 2015.²⁴

Walking and hiking

Walking for exercise is the most popular sport or activity which Australians regularly participate in. Nearly half of adult Australians, or 47.9%, regularly go for a vigorous stroll.²⁵

Hiking and rainforest walks undertaken by international visitors to Australia increased by 7% to 1.9 million²⁶ in the year ending September 2018.

Further demonstrating the popularity of walking as a recreational activity, Bushwalking Victoria, representing all bushwalkers and bushwalking clubs in Victoria, has over 60 affiliated clubs. Collectively, they represent 8,000 members and 250,000 bushwalkers who actively engaged in outdoor recreation.²⁷

¹⁹ ABS, 4177.0 - Participation in Sport and Physical Recreation, Australia, 2013-14. Latest Issue Released at 11:30am (Canberra time) 18/02/2015

²⁰ ABS Australian Social Trends June 2011 – Sport and physical recreation

²¹ A Marsden Jacob Report. Victoria's nature-based outdoor economy. Outdoors Victoria & Sport and Recreation Victoria. Report Issued: 27.1.2016

²² Tourism Events and Visitor Economy (TEVE) Research Unit Factsheet, January 2019. Visitors to Victoria – Experience Overview (Results for the year ending September 2018)

²³ A Marsden Jacob Report. Victoria's nature-based outdoor economy. Outdoors Victoria & Sport and Recreation Victoria. Report Issued: 27.1.2016

²⁴ A Marsden Jacob Report. Victoria's nature-based outdoor economy. Outdoors Victoria & Sport and Recreation Victoria. Report Issued: 27.1.2016

²⁵ Roy Morgan Research www.roymorgan.com/findings/7592-australian-sports-participation-rates-among-children-and-adults-december-2017-201805110755

²⁶ TRA International Visitors in Australia – Year ending September 2018

²⁷ <https://bushwalkingvictoria.org.au/about-us>

Cycling

In the year ending September 2018, the number of international visitors to Australia who participated in cycling increased 12% to reach 495,000.²⁸

Shared paths are the most common form of off-road cycling facility in Australia.²⁹

While over a third of Victorians have cycled in the last year, most of them did so for recreational purposes rather than for transport.³⁰

The popularity of electronic bikes, or e-bikes, is growing rapidly. An e-bike allows people of various fitness levels to cycle together, taking on greater distances and inclines with ease.³¹

Quipmo is potentially the next trend in the sharing economy that will give Australians access to bicycles and other sporting equipment anywhere at any time. It is a peer-to-peer gear rental marketplace that will give people access to all kinds of bikes and accessories wherever they are to help them see the sights and live like locals. The concept has the potential to make bike riding easier for people all around Australia and further align Australia's cycling community with tourism.³²

In neighbouring New Zealand, there is evidence to suggest that cycle visitors stay longer. Visitors that participate in cycling spend 33 nights compared to all holiday visitors who stay 16 nights.³³ On average, cycling tourists also spend more on their visit when compared to all visitors and this pattern has continued throughout recent years.³⁴

³⁵

Mountain biking

Mountain biking continues to grow as one of the fastest and most popular family friendly lifestyle activities in Australia. This is highlighted by the number of people riding trails across Australia every weekend, both before and after work.³⁶

Membership, affiliations, and participation numbers have increased on the previous year with financial members of Mountain Bike Australia increasing by 13.7% to over 15,000. With the inclusion of past members and those that had purchased a day licence, MTBA's reach is currently over 70,000 individuals.³⁷

Mountain bike trails created or ridden on by national park visitors that are not part of the authorised mountain bike trail network are sometimes closed and rehabilitated by park managers to protect public safety, mitigate visitor risk and protect environmental and cultural heritage values.

²⁸ TRA International Visitors in Australia – Year ending September 2018

²⁹ Victoria Walks (2015). Shared paths – the issues, Melbourne, Victoria Walks

³⁰ Victorian Cycling Strategy 2018-2028. Transport for Victoria

³¹ <https://worldexpeditions.com/2019-adventure-travel-trends>

³² Bicycle Network Media Release 11 April 2018 <https://www.bicyclenetwork.com.au/newsroom/2018/04/11/quipmo-the-next-big-roller-in-the-sharing-economy/>

³³ <https://www.tourismnewzealand.com/markets-stats/sectors/special-interest/>

³⁴ https://www.tourismnewzealand.com/media/1764/cycling-tourism_profile.pdf

³⁵ <https://www.tourismnewzealand.com/markets-stats/sectors/special-interest/cycling-and-mountain-biking/>

³⁶ Mountain Bike Australia Annual Report 2018

³⁷ Mountain Bike Australia Annual Report 2018

Trail Markets and their Preferences

Each of the trail markets (users) has a preferred approach to the experience they are seeking. By way of example, hikers ideally have trail heads with car parks, and information. They prefer not to walk on '4 WD tracks' although in many cases these are the best options available.

The preferences have been developed based on the market knowledge, research (some of which is included in this document) and competitor destination analysis.

Rise of E-bikes

E-bikes – or pedal assisted bikes – are rapidly gaining popularity with cycle retailers reporting a surge of demand and ownership uptake, especially in the mountain biking category. This opens a vast range of opportunities for hilly terrain (such as on Mt Baw Baw) and for long-distance 'journey' rides such as being proposed with the Gippsland Trail.

E-bikes are making riding more 'accessible' to people with different abilities including children (which are also expanding market segments) and a more senior demographic, with anecdotal evidence pointing to many more senior riders returning to the activity in older age, having previously lapsed their involvement due to perceived difficulty of physical effort.

Importantly, E-bike riders are typically seeking a recreational experience, more so than a competitive one, valuing high-quality, accessible, nature-based experiences that offer some degree of support (via township and service integrations, inclusive charging points for longer distance journeys).

Electric/power-assisted bikes represent one of the fastest growing segments of the bike industry as they:

- Allow riders to extend cycling distance
- Encourage more users into the recreational cycling fold
- Enable those who would otherwise not have considered cycling as a preferred recreation due to concerns about age or fitness
- Significantly extend upper age limit of riders
- Increase overall average usage, leading to health and well-being gains
- Encourage access to landscapes where ascents are a deterrent – this is of specific relevance to Gippsland landscapes.

The global e-bike market was valued at USD 15.42 billion in 2019, and it is expected to register growth of 6.21%, during 2020-2025. Increasing consumer preference toward recreational and adventure activities is expected to drive the market.³⁸ Between 10,000 and 15,000 e-bikes were sold in Australia in 2017, twice the number than in 2016. It is expected sales have risen at a similar rate since.³⁹

³⁸ .Mordor Intelligence E-Bike Market 2020-2025, Executive Summary

³⁹ <http://www.mtbiking.com.au/news/bike-price-rises-off-table-as-tariff-appeal-fail>

Primary Target Market Mix

Several primary markets have been identified as ideal for this product. Derived from the Gippsland Tracks and Trails Study⁴⁰, they are shown in the table below with some of the characteristics for each segment.

Table 4. Gippsland Trail Primary Market Mix

MARKET	DESCRIPTION	EXPERIENCE NEEDS AND PREFERENCES
Regional Residents		
Walkers and Hikers	<ul style="list-style-type: none"> Wide range of users and ability levels including people using trails for exercise, commuting, relaxation, and leisure activities. Some groups using rail trails and local paths, some seeking nature and adventure experiences in the regions National Park and reserves. 	<ul style="list-style-type: none"> Safe short trails for daily use. A range of all-ability access trails. Short to long trails for weekend leisure activities both close to population centres and within easy weekend travel from home. Appealing destinations. Linked or nearby activities, attractions, and accommodation. Short to long hiking trails in a variety of locations (from near-urban to remote) at a range of difficulties. Links from accommodation hubs to areas of interest such as the Latrobe Valley, South Gippsland, East Gippsland. Accessible trailheads with adequate parking and facilities. Overnight or multi-day trails with provision for on-trail camping or hut accommodation or nearby off-trail accommodation. Regional residents often seek areas away from the busy tourism hot spots in peak periods to continue to enjoy their local area highlights. Gippsland has a wide variety of trails that can be used when some areas are busy.
Cyclists (excluding mountain biking)	<ul style="list-style-type: none"> Wide range of users and ability levels including people cycling for exercise, commuting, relaxation and leisure activities and touring. 	<ul style="list-style-type: none"> Safe cycling or shared use trails for daily use. Short to long cycle trails for weekend leisure use both close to population centres and at visitor hubs within easy weekend travel from home. Appealing destinations. Linked or nearby activities, attractions, and accommodation such as wineries, cafes, and good food. Some may require bike hire or transport services Accessible trailheads with adequate parking and facilities such as the Gippsland Plains Rail Trail which can utilise the train as a one-way travel source and then ride the return leg back to the car.

⁴⁰ Gippsland Tracks and Trails Study. 2019. TRC Tourism

MARKET	DESCRIPTION	EXPERIENCE NEEDS AND PREFERENCES
Domestic Visitors		
General Visitors	<ul style="list-style-type: none"> • People on a holiday or visiting friends and relations. • For Gippsland, this is likely to be shorter easy to access trails. 	<ul style="list-style-type: none"> • Trails of different types to or at points of interest suited to a range of abilities. • Something different to do while on holiday. • Equipment and bike hire. • Short guided tours. • Easily available information and packaged tours/product to provide the experience in an easily accessible way. • Picnic and toilet facilities close to the trail so that the stop can be an enjoyable one and made easy for them.
Soft Adventure	<ul style="list-style-type: none"> • Families, adult couples, and retired people seeking trail activities of one or more day's induration. • Some may visit the region specifically to undertake a particular trail. • This will generally occur on trails that are more widely used and offer a 'safer' entry into trail use 	<ul style="list-style-type: none"> • Hiking and cycle trails packaged for journeys of one or more days. • Guided or self-guided tours or packages, accommodation, linked activities. • Mountain bike parks with variety and/or iconic rides. • Transport, accessible trailhead, equipment, and bike hire. • Good pre-trip information and booking. • Engaging, immersive interpretation. • Generally good facilities nearby for food and beverage after completing the trail adventure.
International Visitors		
Cycle/ Mountain Biking Tourists	<ul style="list-style-type: none"> • Mainly visitors from Australia, UK, USA, Germany, Canada, Netherlands aged from young adult to people in their 50's and 60's, travelling alone or with a partner. 	<ul style="list-style-type: none"> • Iconic and challenging rides and trail journeys. • Outstanding trail networks and bike parks that offer 2 to 3 days riding and a range of trail type and difficulty levels. • Multi day epic trail with support services to make experience more accessible. • Trailheads with appropriate facilities including car parking, bike wash-down, food services, shuttle transport. • Bike hire and repair services. • Accommodation and food and beverage appropriate for people travelling long distances for an outstanding experience. • Good pre-trip information and booking. • Signature events.

4. The Proposal

The Vision

The Gippsland Trail will be recognised nationally and internationally as a must do long distance multi-use trail showcasing the best of Gippsland while activating towns and communities.

The objective of the Gippsland Trail is to drive economic growth through attracting additional visitors to Gippsland, and for those that are already coming to Gippsland - to stay longer.

It will do this through providing scale and market awareness of the trail through the linking of dispersed products both physically, and in a market driven way. Other key objectives include:

- Activation of underutilised existing infrastructure including existing multi-use trails such as rail trails
- Connect and provide for health benefits in communities by increasing the amount of leisure use through the provision of good quality and easily accessible trails
- Disperse benefits throughout Gippsland including activation of the South Gippsland / Wellington areas along the 90 Mile Beach from McLaughlins Beach through to Loch Sport
- Reduce the dependence upon private vehicle access to the trails in Gippsland by linking the proposed Gippsland Trail in the west to the Melbourne Metro train network, and having touch points with the Gippsland train service in Drouin, Warragul, Trafalgar, Yarragon, Moe, Morwell, Traralgon, Stratford and Bairnsdale. In addition, bus services to South Gippsland and Bass Coast can be considered for use depending upon the views of the bus operator
- Supporting the growth in trail businesses in Gippsland. Coupled with the proposed Ride Nation concept in Warragul, the proposed Baw Baw Epic Adventure Ride and the G7 (Central Gippsland Mountain Bike Hub), scale and demand is created for business activation in cycle sales, maintenance, trail maintenance and construction and design.

It is recognised that the provision of a high-quality off-road trail connecting all the existing rail trails would be potentially prohibitively expensive. Accordingly, some 'on-road' cycling may be required. These sections, particularly the longer section north east from Port Albert to Loch Sport, may only suit a particular market.

The bikepacking market that has been identified for these sections is growing and given the minimal costs in attracting cyclists to these areas, it is considered worthwhile to do. In the longer term, it may be appropriate to consider adding to the off-road cycle/multi-use trails network strategically in locations that warrant the expenditure. This will only continue to add to the appeal of the Gippsland Trail.

In preparing this feasibility study, it has been noted that the existing rail trails are generally of a high standard. Individual Councils or rail trail committees that manage the trails (in some cases this is undertaken through a committee of management) are also committed to managing and growing the trail and the markets it services. Creation of the concept of the Gippsland Trail requires individual component trails to be identifiable as a single offering with common branding, messaging, centralised information resources and preferably a centralised model of coordinated management to ensure consistent development, implementation and best practise trail marketing.

It is advisable to create the sections of missing trail that deliver the highest return for investment first.

Any 'umbrella' management model would need to be flexible to work in cooperation with each Council and management structure, whilst supplying strong overall guidance, strategic marketing and higher-level land manager and government department relationships and lobbying.

The investments and commitments required to design, build, maintain, and manage such a collection of trail facilities would be significant, however there is strong combined momentum for such a program. Coupled with other mountain bike proposals being considered, the amplified benefits of creating a cycle and trail tourism industry in Gippsland are significant.

Methodology

TRC carried out desktop research, site visits to all the proposed links, and existing rail trails, along with phone and in-field consultation meetings with leading stakeholders linked to each section of the proposed trail considered for inclusion.

Selection of the route to create the Gippsland Trail has been undertaken by TRC Tourism. It has been based on several criteria:

- Highest quality experiences in nature and culture
- Sustainable in the environment and culturally
- Effective management and coordination including community
- Brand and reputation aligned as well as positioned in the market
- Provides (or has the potential to) for strong visitor number growth into Gippsland
- Cost – the distance means it must be reasonably priced (including using roads where appropriate) for the concept to be economically feasible
- Link existing trails with like for like where it makes sense
- Provide for different markets
- Making best use of the existing high quality off-road and rail trails that exist
- Links existing trail sections with like for like where possible and feasible
- Provides for community benefit including accessible access to trails for recreation, leisure, community connectedness and exercise.

The following table shows some of the factors that drive demand for trail visitation.

Table 5. Factors Driving Demand for Trail Visitation

FACTOR	RELEVANCE TO THE GIPPSLAND TRAIL
Uniqueness: whether the trail is a unique feature that will entice visitors	The entire trail proposal traverses predominantly unique Gippsland landscapes.
Accessibility: can potential visitors access the trail easily	The access via the Metro train network, as well as access to the Latrobe Valley and Gippsland Rail Line stations are strong advantages. Additionally, the proposal takes in most of the large towns and cities of Gippsland providing good access to residents and regional visits.
Role of Gateway Towns: These serve as entry points to attractions such as trails and services	Many of the towns along the proposed trail route will benefit from the trail, either as a service town or through the business opportunities in a variety of sectors that will emerge through additional visitors.
Proximity to Generating Markets: These markets provide a critical mass of potential visitors	Melbourne markets can access the trail easily through the Metro Rail Network extension from Clyde or through Drouin. Regional markets are well connected to the proposed route. The Gippsland Train Line provides good access.

Source – Taylor (2015). What factors make rail trails successful as tourism attractions? A conceptual Framework from relevant literature. Journal of Outdoor Recreation and Tourism, 12: 89-98. Also sourced from SGS Economics and Planning. Extension of the Great Southern and Bass Coast Rail Trails: Cost Benefit Analysis and Economic Impact Assessment. August 2019

Financial modelling of the economic costs and benefits of the proposed Gippsland Trail have been carried out based on research and assumptions. Projections of visitation and economic outcomes, along with costed health benefits, are based on modelling scenarios that estimate annual rides/users, and other assumptions utilised in quantifying spending associated with the Hub. The modelling offers relatively conservative scenarios.

It should be noted that if this proposal is to proceed, significant work will need to be undertaken in detailed trail design and planning, including in some cases leasing land and other forms of agreement with other government agencies and private landholders (it should be noted that private land has been almost entirely avoided in the design of this trail). Detailed assessment on specific trail alignments, build and infrastructure requirements is beyond the scope of this feasibility assessment.

Gippsland Trail Overview

As outlined, the Gippsland Trail concept brings together many of the existing rail and multi-use shared paths across Gippsland. The figure below provides the overview of the proposed trail route.

The proposed trail travels over 700 kilometres through Gippsland, starting in the west at Clyde just on the outskirts of Melbourne. With options along the route, and some sections including public transport, the trail covers the length and breadth of Gippsland and includes outstanding experiences, scenery and communities.

The sections in blue (dark blue representing rail trails and light blue representing off road shared paths) utilise existing multi-use trails such as the East Gippsland Rail Trail and the Great Southern Rail Trail.

The sections shown on the map above in red are proposed to be linkages designed specifically for ‘bikepacking’ using the generally quieter sections of Council or State roads where no other options appear to be currently feasible.

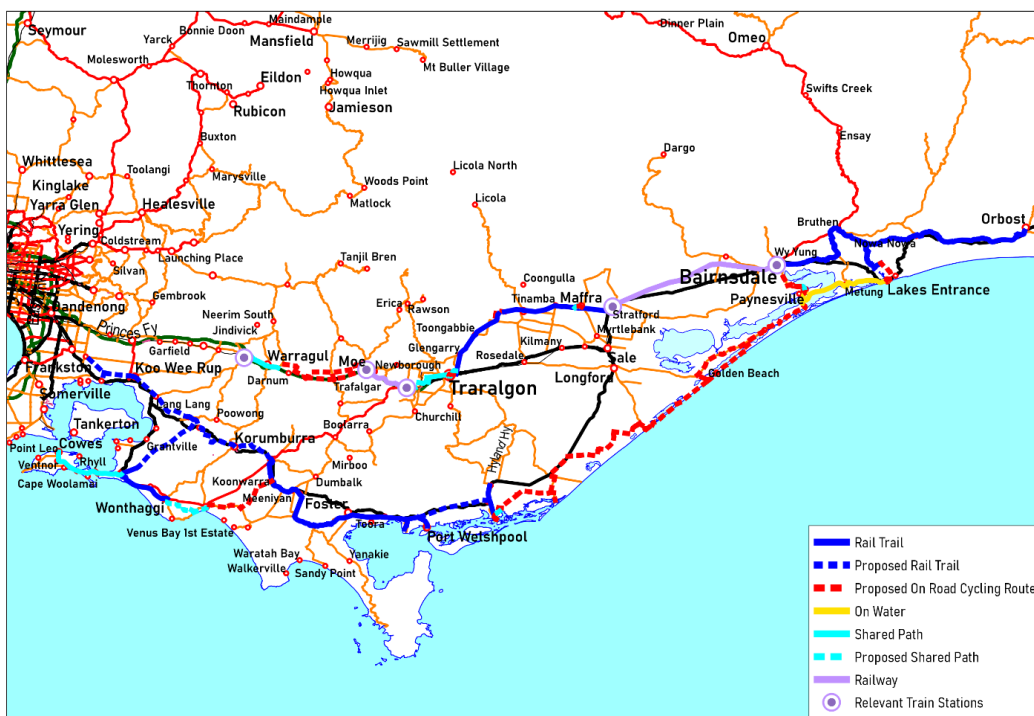
The sections in purple are those where it is proposed to recommend using public transport where on road options do exist but are generally thought to be along sections of highway or road where the experience does not warrant the time and effort involved, or where significant route or safety issues may exist.

The yellow section represents an innovative element to the trail and one that is also an opportunity for business, with the development of a water based transport option. This is most likely to be an existing water taxi service that may expand its operation. The linkage on water, while weather dependent and most likely a seasonal offering, will add to the trail’s overall experience.

While all of the elements add to approximately 700 kilometres, it is unlikely that the entire trail will be cycled or used as one visit with perhaps the exception of the bikepacker market (an element of that market may spend 2 weeks undertaking the entire trip).

Each of the segments or areas within the Gippsland Trail is explored in more detail in the sections that follow.

Figure 4. Trail Overview – Gippsland Trail

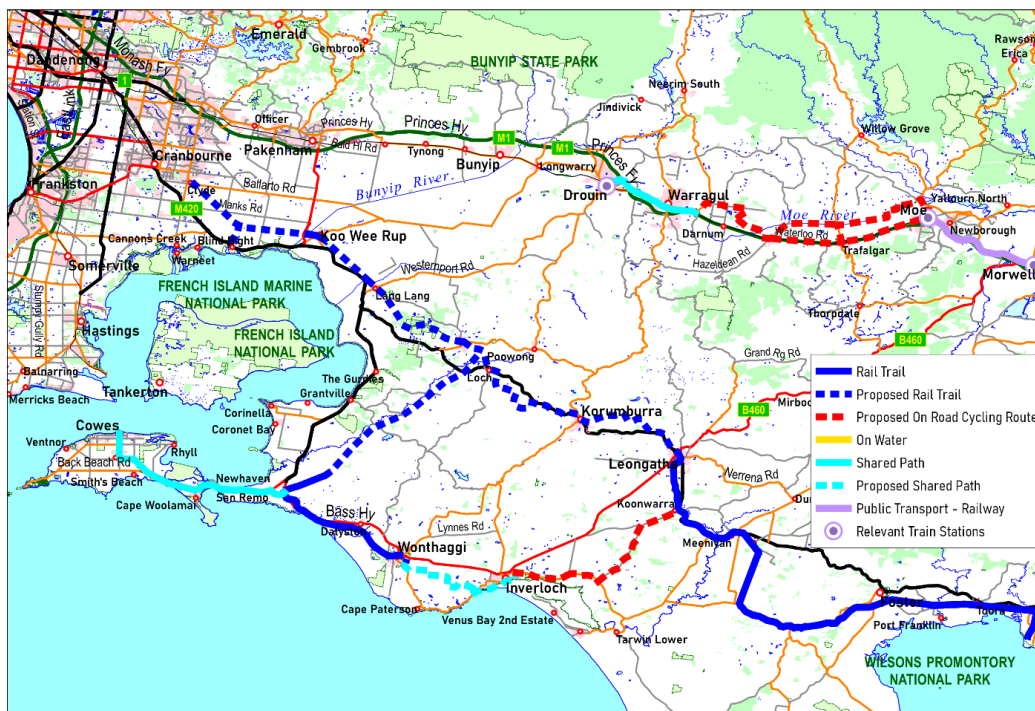


Map – TRC Tourism 2020

Section 1 – Bass Coast, South Gippsland and West Gippsland

This section includes the majority of the Great Southern Rail Trail (GSRT) including the proposed extension of the rail trail westwards to Clyde from Leongattha and Nyora, the Bass Coast Rail Trail (BCRT) including the proposed links between the Wonthaggi terminus of the Bass Coast Rail Trail and Koonwarra via Inverloch. Phillip Island and San Remo are linked into the trail using existing shared pathways. The figure below provides the details.

Figure 5. Section 1 – The Proposed Gippsland Trail



Route Description

From Clyde, the trail is proposed to follow the old rail alignment south-eastward through Kooweerup, and into Nyora. At Nyora, the proposed trail splits with a new section following the branch line to Woolamai and the start of the existing BCRT. Additionally riders and trail users can access Phillip Island from this trail. The main line extends southeastward through the rolling hills of south Gippsland to Korumburra and Leongattha where the proposed extension joins into the existing terminus of the Great Southern Rail Trail.

From Wonthaggi eastwards, the proposed off road path is proposed to use road reserves and come into Inverloch on the northern side of the RACV resort. From Inverloch, the proposal is to develop an on road cycle route to Koonwarra and join into the GSRT. From Koonwarra, it is then possible to cycle south and east to Foster and onwards to Yarram.

Approximate lengths of existing and proposed trail are as follows:

From Clyde to Leongattha (proposed)	75 km
From Nyora to Woolamai (proposed)	21 km
Existing GSRT Leongattha to Port Welshpool	72 km
Bass Coast Rail Trail	23 km
Wonthaggi to Koonwarra (proposed)	25 km

Figure 6. Images of the Proposed Section 1

EXISTING BASS COAST RAIL TRAIL NEAR KILCUNDA



POUND CREEK ROAD BETWEEN KOONWARRA AND INVERLOCH



EXISTING GREAT SOUTHERN RAIL TRAIL NEAR KOONWARRA



PROPOSED RAIL TRAIL NEAR LEONGATHA



Issues.

- The cost of conversion of the existing rail line from Clyde is significant although the benefits significantly outweigh the costs
- Some community interest in retaining the rail corridor in the hope that the rail line could be used again for regular passenger services (considered extremely unlikely)
- Victrack leasing condition and terms need to be factored into the Council decisions on investment in the rail trail
- The trail crosses several Council boundaries although strong coordination is occurring between all Councils from Casey and Cardinia to South Gippsland and Bass Coast
- Some infrastructure requirements including bridges may be significant due to poor repair of the existing and older rail bridges, and the length of the bridges that may be required due to flood prone areas
- No rail line exists Eastwards from Wonthaggi. Council is working through land tenure issues to find the best route to Inverloch and has a proposal that enters Inverloch north of the RACV
- From Inverloch, no off-road corridor has been found as part of this study through to the GSRT either at Koonwarra or at Fish Creek. Accordingly, it is recommended that an on-road section be considered as part of this initial assessment of the route. Ideally, the on-road section would be on a cycle friendly road. The Inverloch to Venus Bay Road which can be busy would ideally be avoided if further detailed studies can determine an off-road route
- Some verge or shoulder widening may provide some safety as would considering dropping the speed limit on some sections of on road cycling
- Other options require further identification including the potential for a water-based section on Anderson Inlet
- The link through from Leongatha or Korumburra to the West Gippsland towns of Drouin or Warragul has not been recommended at this stage. It is felt that it offers a lower return and involves significant climbing over the Strzelecki Ranges, something the target markets generally avoid. This missing link could be considered for a feasibility assessment at a later stage once the core offering is in place.

Markets

This section or component of the Gippsland Trail generally lends itself to weekend and short stay breaks from Melbourne. The GSRT and the BCRT are well established and contain strong food and wine, regional landscapes, coastal and village connections that contribute to a rich experience. Linking these trails to Melbourne and the Melbourne Metro Train network provides an ideal opportunity to expand the market and make it easier to access, and more of a unique experience for day and weekend trips.

Strong local use for communities exists, including providing residents of the major and minor towns recreation and exercise opportunities as well as connectedness between towns and communities.

Phillip Island is a strong visitor destination for the Melbourne market and providing the link to the existing Phillip Island to San Remo shared pathway provides access to the highlights of the Island including Cape Woolamai and Cowes.

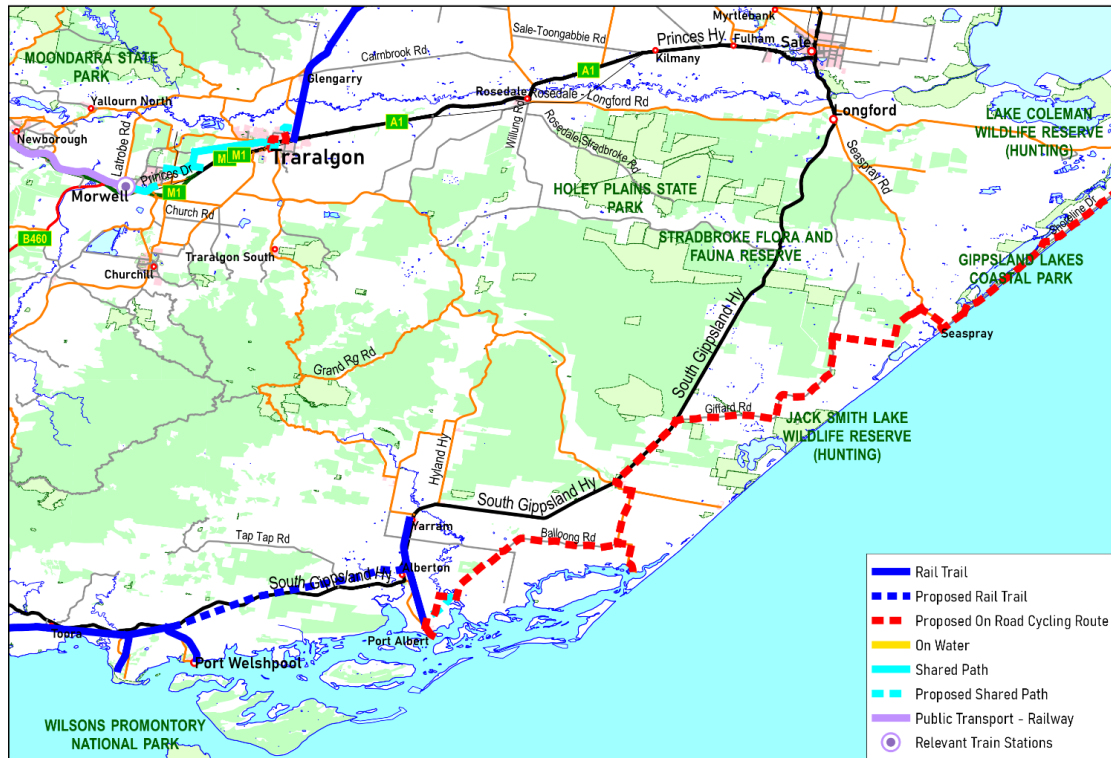
Business opportunities exist in the food and beverage sectors, transport sectors (shuttle services), accommodation (close to the rail trail) and service sectors.

Bike packers and those intending to travel for longer periods on the Gippsland Trail will use these sections of the trail and continue eastward through Yarram and into South Gippsland.

Section 2 – 90 Mile Beach and Southern Gippsland

This section includes the eastern end of the GSRT, and the proposed bike packing route from Port Albert (currently being constructed as the southern end of the GSRT) through to the Loch Sport and Lakes National Park (see next section). The figure below provides the proposed section details.

Figure 7. Section 2 of the Gippsland Trail – 90 Mile Beach and Southern Gippsland



Route Description

From the eastern of the GSRT, the proposed extension of the rail trail from Welshpool to Alberton is currently the subject of detailed planning and funding consideration by both South Gippsland and Wellington Shire Councils. The trail joins the existing component from Yarram to Alberton and the currently being constructed section to Port Albert.

The proposed bike packing component of the trail begin in Port Albert, a lovely fishing village. Back roads are used to travel through the rural landscape of the 90 Mile Beach and environs, A small section of the South Gippsland Highway is proposed to be used (see issues below) before the proposed route travels to Seaspray and the Shoreline Drive. Shoreline Drive presents a strong cycling experience nestled behind the 90 Mile Beach dunes and with good access to the beach, camping and other services throughout the small towns.

Approximate trail distances:

Port Welshpool to Alberton (proposed)	22 km
Yarram to Port Albert	12 km
Port Albert to Seaspray	75 km

Figure 8. Images of Section 2 of the Proposed Gippsland Trail



SOURCE – TRC TOURISM 2020

Issues

- To avoid the culturally sensitive Jack Smith Lake Wildlife Reserve, a small section of the South Gippsland Highway is required to be used (between 4 and 10 km depending on the side roads ultimately used). The South Gippsland Highway is a State Highway and carries significant traffic. Ideally an off-road section of trail is constructed on the road reserve
- The on-road sections beginning at Port Albert will deter many of the larger number of Rail Trail riders from continuing to Seaspray and further east
- The roads selected (apart from the South Gippsland Highway) are generally considered low use and for the most part have wide shoulders and good sight lines. They are also generally flat to undulating
- Rail Trail users completing the GSRT new proposed sections at Port Albert will require transport back to their point of origin or retrace their steps.

Markets

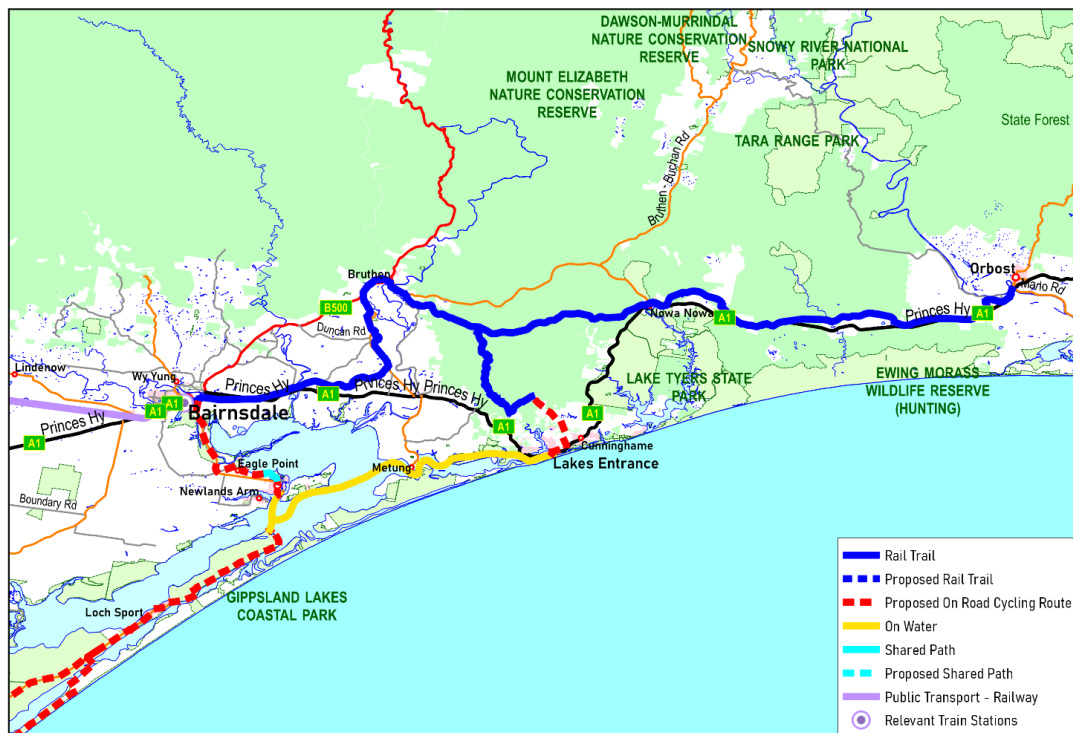
This proposed extension of the GSRT provides for a new and extended ride for the family and leisure and recreational riding markets using the trails. It also provides:

- Strong local use for communities exists, including providing residents of the major and minor towns recreation and exercise opportunities as well as connectedness between towns and communities.
- Business opportunities in the food and beverage sectors, transport sectors (shuttle services), accommodation (close to the rail trail) and service sectors.
- Those intending to travel for longer periods on the Gippsland Trail with the ability to use these sections of the trail and continue eastward through Loch Sport and into the Gippsland Lakes and East Gippsland, or return through Central Gippsland and the Latrobe Valley.

Section 3 – East Gippsland and the Gippsland Lakes

Heading east from section 2 of the trail sees trail users experience the 90 Mile Beach and enter the Gippsland Lakes. This includes the towns of Loch Sport, Paynesville, Metung, Lakes Entrance, Bairnsdale, and the towns on the East Gippsland Rail Trail.

Figure 9. Section 3 of the Gippsland Trail – East Gippsland and the Gippsland Lakes



Route Description

This section of the trail continues eastward from the previous section along the 90 Mile Beach and into Loch Sport. An option exists to use a closed road behind the dunes subject to approval from Parks Victoria. At Loch Sport, and after visiting the small towns along the 90 Mile Beach, the trail is proposed to use the internal road network within the Lakes National Park to Point Wilson (Sperm Whale Head). At this point, a new water taxi (or similar) service will pick up cyclists and trail users (subject to market demand and business opportunity) and take them to either Paynesville, Metung, or Lake Entrance.

Existing trails from Lakes Entrance take users to the East Gippsland Rail Trail (EGRT). Existing and proposed on road cycling takes bike packers from Paynesville to Bairnsdale and then either into the public transport network or onto the EGRT.

The EGRT provides a strong experience taking visitors through to the Orbst trail head and includes the opportunity to cycle a repaired and re-opened Orbst Snowy River Rail Trail timber bridge.

Approximate trail distances:

Seaspray to Loch Sport (Proposed on road)	54 km
Loch Sport to Point Wilson (proposed on road)	20 km
Point Wilson to Lakes Entrance (via Paynesville and Metung)	29 km
Lakes Entrance north to EGRT	17 km
East Gippsland Rail Trail – Bairnsdale to Orbost	94 km
Paynesville to Bairnsdale (partial on road partial off road)	16 km



Issues

- Using the tracks through the National Park (without any further clearing) is subject to Parks Victoria approval – although it is acknowledged the cyclists can use the roads and trails from Loch Sport to Sperm Whale Head on existing roads
- The on-water component is wholly dependent upon a commercial operator taking up the opportunity. Given the initial demand, it is likely to be an existing operator on the Gippsland Lakes that adds this to their existing business. Jetty infrastructure at the Lakes NP, and the towns visited including Paynesville and Lakes Entrance are appropriate as they exist now for cyclists and walkers
- Paynesville to Bairnsdale is proposed as on road except for the smaller sections between Paynesville and Eagle Point where existing off-road trails are proposed to be used. This section of road is relatively highly trafficked but has a wide shoulder
- From Lakes Entrance, the Gippsland Lakes Discovery Trail is proposed to be used until it joins the East Gippsland Rail Trail. Parts of the EGRT have been affected by the 2019 fires and repairs are required and it is understood that these are the subject of funding arrangements being implemented at the time of this report preparation
- The viaduct bridge at Orbost is currently unusable. Repairs would see it form a strong experience element of the Gippsland Trail and the EGRT
- The end of the trail at Orbost requires either along backtrack to Bairnsdale or suitable transport arrangements

Markets and Opportunities

Existing markets for the EGRT are likely to be expanded. Currently over 50% of EGRT users are estimated to be local and regional visitors. Additionally, assuming that the water based transport (taxi service) can be developed, it will add a strong weekend / several day experience with visitors potentially arriving by train or car into Sale or Bairnsdale, riding including the water option and using the proposed and existing trails.

Loch Sport will see an increase in cycling and trail-based activity as will the other smaller communities and villages of the 90 Mile Beach.

Adding bike packers to the potential users who are likely to either partially or fully complete the eastern components of the proposed route adds to the visitor numbers.

Weekend and regional visitors will have a strong experience offering based on the existing trails with added curated experiences.

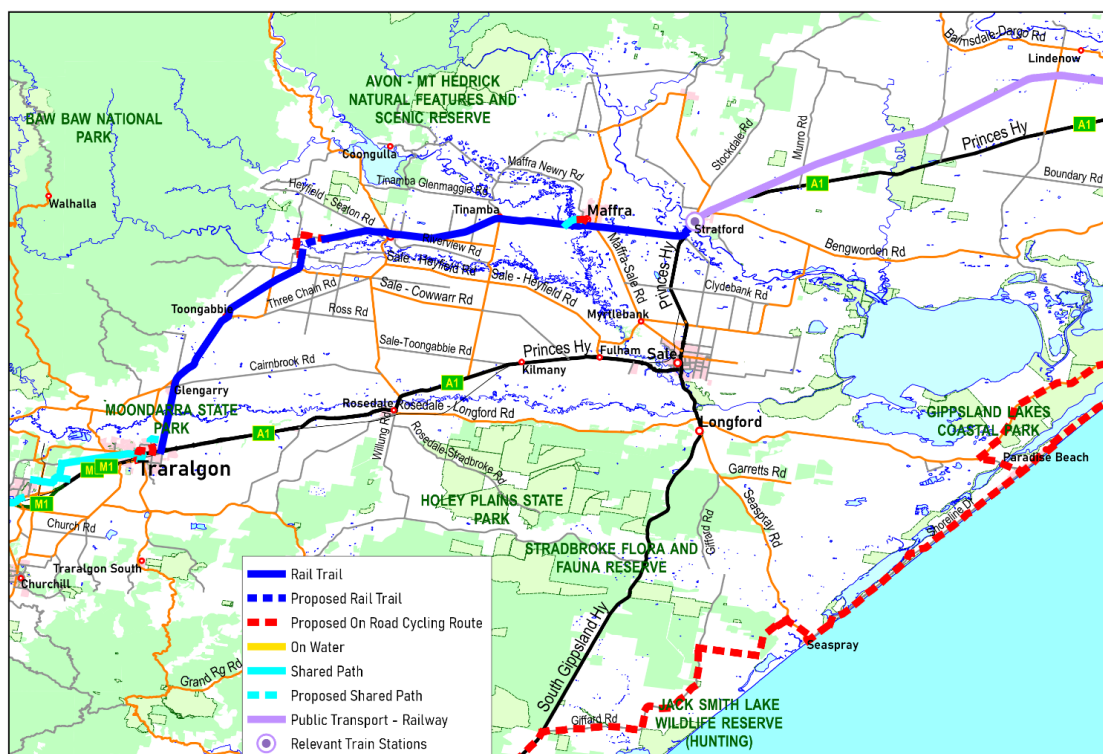
The opportunities for new and existing businesses are significant across all trail related sectors including food and beverage, accommodation, transport, and service sectors.

Section 4 – Central and Eastern Gippsland

Section 4 of the proposed Gippsland Trail shows the proposed routes between Bairnsdale and Traralgon. Utilising the existing GPRT and public transport in lieu of riding the Princes Highway. The section offers good riding on generally flat terrain between communities and villages.

The map below provides the route options.

Figure 10. Section 4 – Central and Eastern Gippsland



Route Description

The route from Bairnsdale to Stratford (undertaking the proposed trail in an anti-clockwise direction) involves either a ride on the Prince Highway (approximately 50 kms between Bairnsdale and Stratford) or taking the option of public transport (train) from Bairnsdale to Stratford. The train is recommended due to the long section of ride on the Princes Highway which is both relatively featureless and potentially dangerous.

Once the traveller arrives in Stratford, the existing GPRT provides a strong and existing experience. The trail begins (or ends) in Stratford and travels through the Central Eastern Gippsland hamlets of Maffra, Tinamba, Cowwarr and Glengarry before arriving in Traralgon.

Once in Traralgon, a route has been identified by the Latrobe City Council the takes trail users off road through to the Traralgon to Morwell shared pathway. This section of the Gippsland Trail is proposed.

The Traralgon to Morwell shared pathway is a recent initiative of the City of Latrobe and links Traralgon and Morwell. This will form a part of the proposed Gippsland Trail.

Approximate distances are as follows:
Train Service – Bairnsdale to Stratford 50 km
Stratford to Traralgon (GPRT) 63 km
Traralgon to Morwell (shared pathway) 12 km

Figure 11. Images of the Proposed Route from Bairnsdale to Traralgon



Issues

- Public transport options from Bairnsdale to Stratford are recommended for several reasons as discussed in the route option above. Trains may not run consistently and be replaced by bus services which may not take or allow bikes and other trail use equipment
- While some elements of the market may see the train as an addition to the experience, others may see it as a barrier. Cycling on the Princes Highway from Bairnsdale to Stratford can be undertaken but it is a long and relatively featureless section of the proposed trail route
- The Stratford to Traralgon GPRT offers a strong experience and is well used
- Arriving in Traralgon from the east on the GPRT, the existing rail trail concludes prior to reaching the railway station, or the shared pathway through to Morwell. While a route has been developed as a preliminary option, it may be some time before it is completed, thereby affecting the experience of people leaving the GPRT. This is also proposed as the concluding section (an option) to the Gippsland Epic Adventure Ride (Baw Baw to Traralgon).

Markets and Opportunities

Existing markets for the GPRT are likely to be expanded. While no published data for the GPRT exists, conversations with the GPRT Committee of Management indicate that in the order of 75% of current trail users are local or regionally based.

As per the previous section, an increase in bike packers will diversify the existing user group and potentially add significant volume to overnight trail-based stays and spending to the existing day local user markets. Weekend and regional visitors will have a strong experience offering based on the existing trails with added curated experiences.

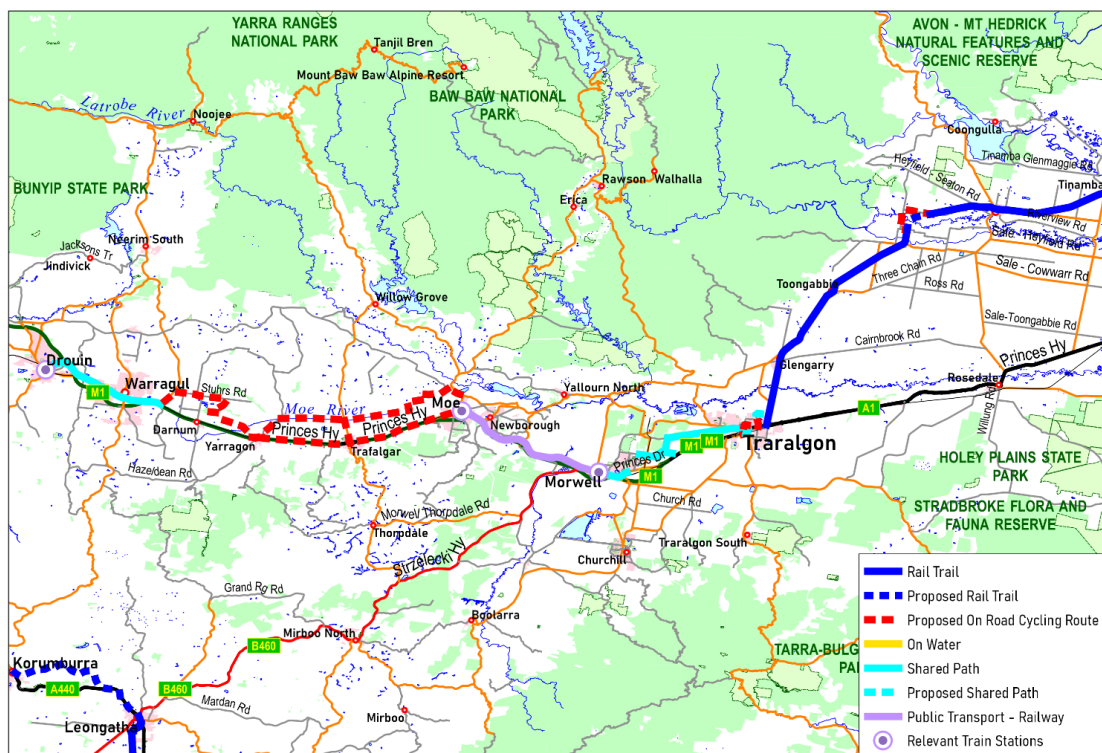
The opportunities for new and existing businesses are significant across all trail related sectors including food and beverage, accommodation, transport, and service sectors.

Section 5 – Latrobe Valley and West Gippsland

This section of the trail, travelling anti-clockwise, takes trail users from the Traralgon to Morwell shared pathway through to Drouin and the proposed trail head. This section has components that are difficult to achieve an alignment for similar markets due to the nature of the existing infrastructure, freeway interchanges, land tenure and the terrain.

The figure below provides the details of the proposed route.

Figure 12. Section 5 – Latrobe Valley and West Gippsland



Route Details

Travelling westward from Morwell, it is proposed to use public transport from Morwell to Moe. There is a train every hour most days and during likely travelling times for trail users. This overcomes a complex area where several freeway crossings and a lack of available land corridors prevents the development of a likely trail corridor.

From Moe, the trail's proposed route has two options that are both presented; firstly via Waterloo Road just north of the M1 Freeway through to Trafalgar and Yarragon, and then onto the Little Moe River Road, Stuhls Road and the Nilma Shady Creek Road before returning to Nilma and re-joining the existing off road shared trail to Warragul, or secondly through the preferred approach along the North Canal Road into Yarragon.

Using either option, the proposed route then joins into the existing shared pathway through Nilma and into Warragul. Once in Warragul, the proposed route then uses the Two Towns Trail and heads westward to Drouin and the railway station at the end (or start) of the proposed Gippsland Trial.

It is noted that the Baw Baw Council has longer term plans to extend the Two Towns Trail through to Trafalgar.

Approximate Distances:

Morwell to Moe Public Transport Option	15 km
Moe to Nilma	31 km
Nilma to Drouin	11 km

Figure 13. Images of the Proposed Route from Morwell to Drouin



Issues

The Traralgon to Morwell shared path needs to be connected to the Traralgon Railway Station, or at the least connected to the GPRT to provide a contiguous off-road trail. This will provide benefits not only to users of the Gippsland Trail (or elements of it), but also to residents and the local community.

From Morwell, there is no apparent route to Moe that is meaningful and gets trail users off road. Several alternatives were investigated but due to the Freeway interchanges, and lack of available land, the only alternative is a longer route to the north. For this reason, public transport is recommended for this section of trail. Further investigation as part of full Latrobe City planning exercise may be required to look at private land or mine sites for any proposed route off road.

From Moe, several alternative routes were investigated to get through to the Yarragon and Trafalgar townships. The easiest alternative was to take Waterloo Road just to the north of the Freeway. This is however a relatively feature free route that may not be the best experience. The alternative route is to take North Canal Road, a scenic and low traffic alternative just to the north of the Waterloo Road route. It is the preferred route.

TRC understands that Baw Baw Shire Council and the City of Latrobe are working together to try to bridge the gap between Nilma and Moe in terms of shared pathway. The assessment of TRC tourism in the context of this plan and the benefits to commuter and other recreational / leisure trail users is that it would be beneficial to do so.

Markets and Opportunities

The Latrobe Valley to Drouin section of the trail is as much about residential benefit as it is the visitor economy although it is TRC's assessment that both will benefit. A shared path between Traralgon and Drouin – if it were able to be completed, would be a significant and worthwhile piece of community infrastructure that would aid in exercise, recreation, community connectedness and health benefits.

The tourism benefits would mainly apply to the bike packer market in the context of the Gippsland Trail. The trip between Drouin and Traralgon passes through farmland and is generally very scenic with the right route chosen.

The proposed trail would also provide a strong weekend product for people both regionally and from Melbourne. The ability to catch a train between Drouin and Traralgon and return with your bike and equipment is a strong proposition and if the experience were curated well would stand alone. It would also provide significant trail-based business opportunities to sectors such as transport, accommodation, food and beverage and other recreational providers.

Road Safety Assessment of On Road Cycling

Ideally the Gippsland Trail would be all off road – or on trails that have at least some separation from motorised vehicles. That is the preferred option and while this feasibility assessment recommends some sections of this trail are on road due to the cost of building off road trails, it is not without some risk to cyclists and other trail users.

The highest traffic volume roads where this study has found no alternative route, or where the economics at this point limit the benefit of an off road trail include two sections of State Road – the South Gippsland Highway (for approximately 3 to 4 km) and the Inverloch to Venus Bay Road.

Both sections of road carry in the order of 700 to 1000 vehicle passes per day and include the potential for heavy transport.

Typically, safety improvements will be based on proven treatments for cyclists/pedestrians/horses such as dedicated lanes and accompanying warning/information signing which aim to separate vehicles from the other types of users and improve their visibility and that of any dedicated lanes.

Dedicated wide kerbside lanes including line marking created by sealing the road shoulders to a sufficient width (minimum 1.5m) is the most obvious treatment, however, this treatment is effective in low speed, low traffic volume environments – which parts of this route are not.

There is the risk factor of this route being heavily used by tourists, many of these from overseas (thus they will not be confident drivers), and the inclusion of traffic types other than vehicles on an unfamiliar road will increase risk of collision.

According to the VicRoads “Traffic Engineering Manual Volume 3 – Additional Network Standards & Guidelines Design Guidance” for strategically important cycling corridors, when developing concepts for a preferred cycling route, “Figure 3” flowchart (below) should be used to select the appropriate solution.

In both the cases of the Inverloch to Venus Bay Road and the South Gippsland Highway, the option of ‘Re-Assess the Route’ is reached from the flow chart application.

While this does not necessarily change the recommendations of this report, noting that cyclists use these roads now, it is important to take into consideration and over time reassess the routes to find safer ones.

Accordingly, we recommend that the 04 km of the South Gippsland Highway that is to be considered for the trail be considered for a wider shoulder or off-road component. The Inverloch to Venus Bay section of road should be a temporary solution until such time as further planning reveals a better alignment either off-road or on water.

The figure below provides the flowchart to be considered during planning stages of cycling and other non-motorised transport.

Figure 14. VicRoads Preferred Cycling Treatment Flowchart

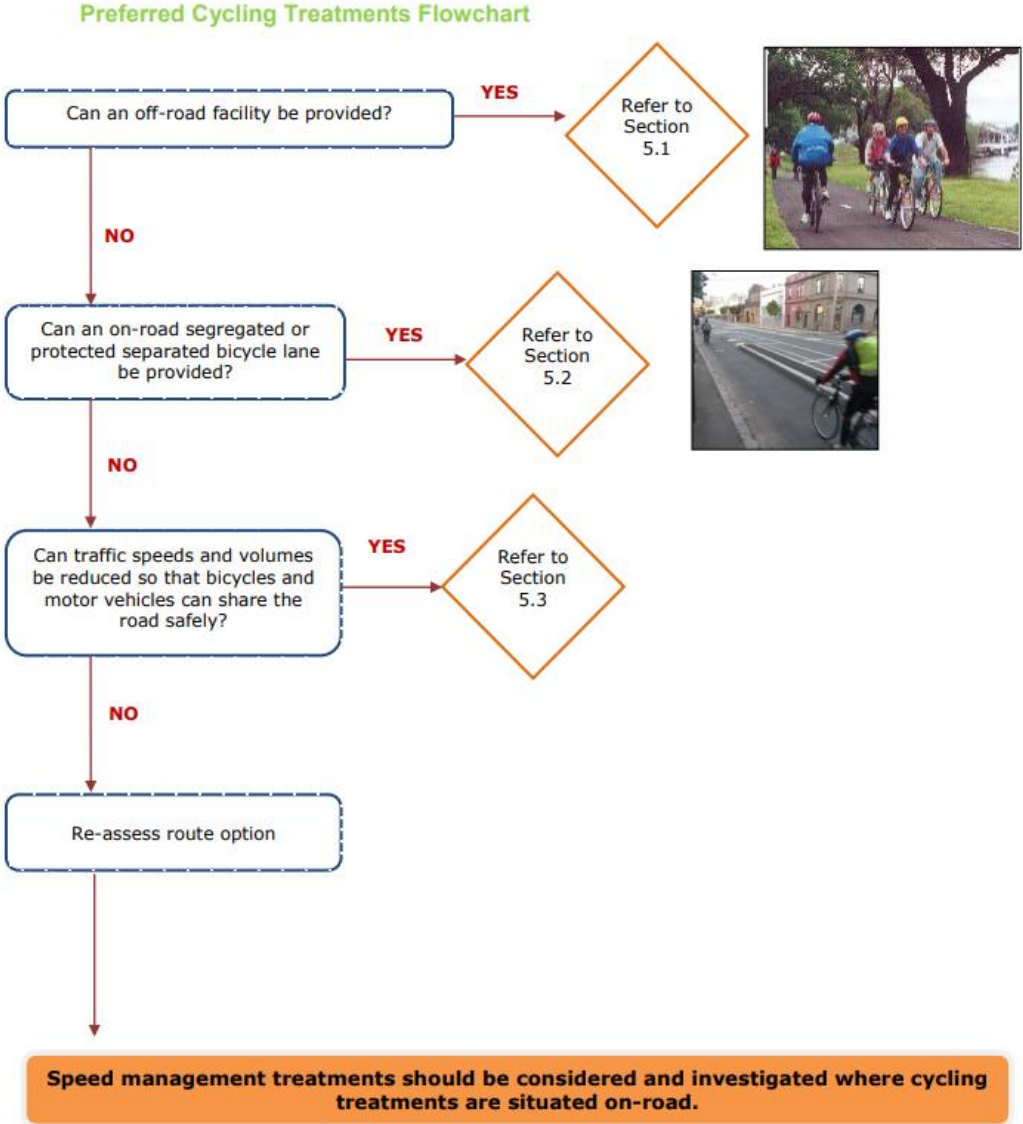
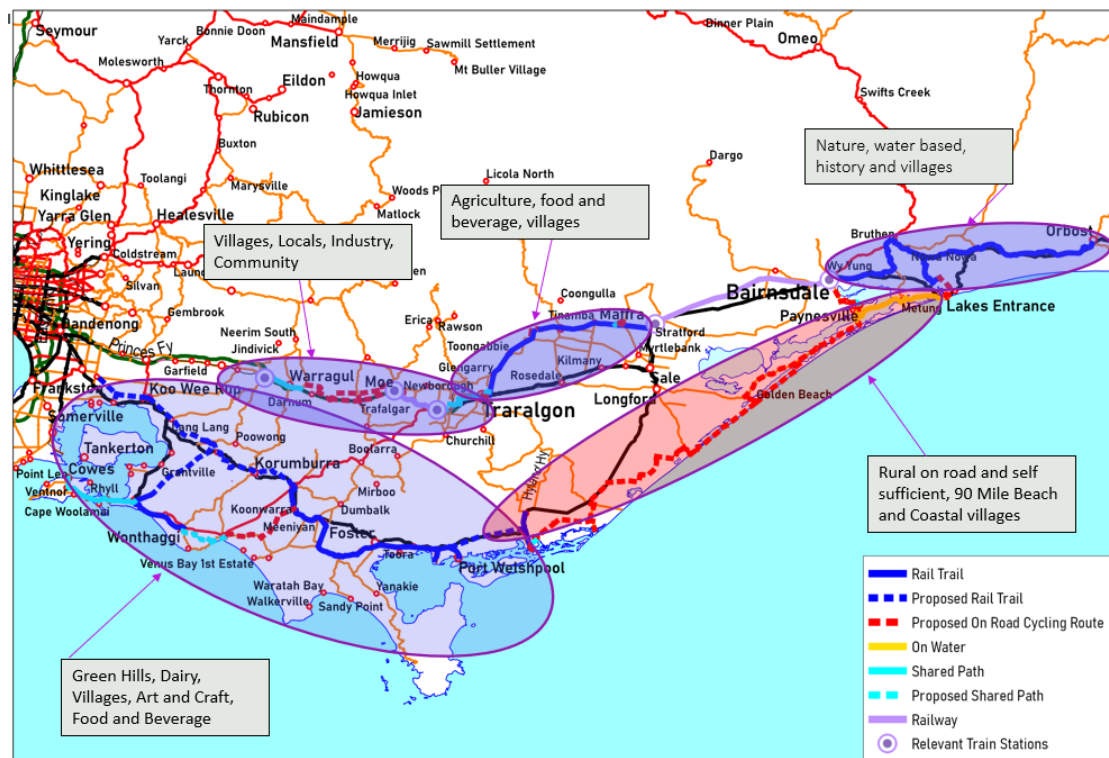


Figure 3: Preferred Cycling Treatments Flowchart

Experience Elements

The Gippsland Trail offers a unique (in Australian terms) long distance trail for cyclists as well as long distance trail users. Due to the need to construct it over time, and include on road sections, there are natural ‘experience clusters’ that exist on the trail. Each of these has been covered in the text associated with each of the proposed sections of this report. The map below provides a visual representation of the experiences based on the terrain, the trail type, and the offering.

Figure 15. Experience Elements and Features of the Gippsland Trail



Each experience element can and will serve a market and will also complement each other to create the Gippsland Trail.

5. Relevant Case Studies

The Great North Trail – UK

The Great North Trail in the United Kingdom (UK)⁴¹ has recently been launched. In many ways it models the concept of the Gippsland Trail. The concept answers the demand from cyclists for greater access to the countryside and largely away from traffic.

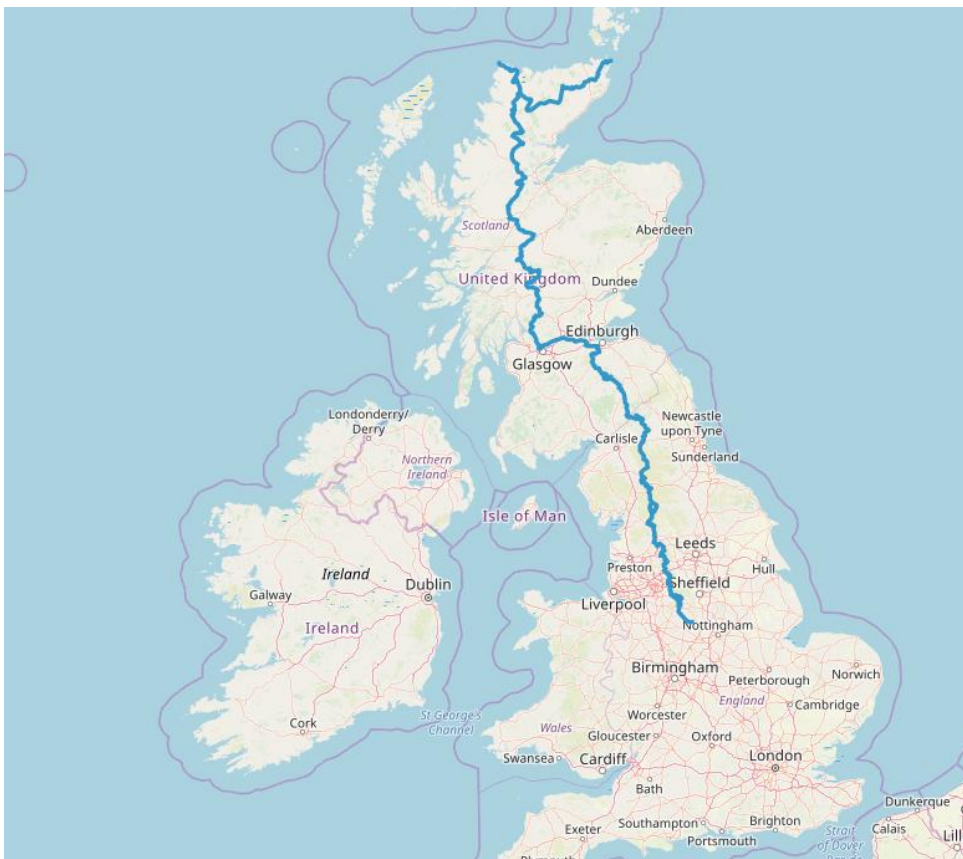
Like Gippsland, most of the trail has been designed to be off road, but a smaller number of low traffic country laneways and low traffic minor roads are used.

The route takes in the UK and Scotland's scenic heart and offers significant benefits to the economy of the region acknowledging the additional spending from cyclists visiting the area.

The trail is designed to be used by mountain bikers, but as per the Gippsland Trail, not all sections are the same. Some cater for more experienced riders, while some other sections are on canal paths, quiet roads and laneways offering families suitable riding conditions.

The trail is over 800 miles (1,300 km) long and leaves from the Peak District travelling to John O'Groats in northern Scotland.

Figure 16. The Great North Trail – UK.



⁴¹ The Great North Trail. www.cyclinguk.org/press-release/new-800-mile-trail-launched-promote-access-countryside

The Great American Rail Trail

The Great American Rail Trail (GART) is a ground-breaking long-distance trail currently both in planning and in operation (in part) in the USA. It traverses the continent and serves 50 million people who live within 50 miles of the trail.

Insights from this for the Gippsland Trail include:

- It takes time to get the trail completed – the GART is only partially complete and planning is still underway in many areas where the route is uncertain, but the concept and vision drives the development of the GART and connections are made as and when funds and land and routes become available
- A separate entity has been formed to oversee the fund raising and planning with authorities for the trail
- The objective is to have the entire trail off road and either walkable or bikeable
- The economic and social benefits are described in full in their advocacy material and comprehensive.

Figure 17. Map of the Great American Rail Trail



6. Trail Costing

Costing the trail is undertaken through a variety of input sources. These include:

- Distances of trail to be constructed on road
- Distances of trail to be constructed off-road
- Allowance for unknown elements such as a per kilometre rate for on road safety measures that may include fencing, signs, speed limit reviews, verge widening etc
- Reference to previous reports including cost benefit analysis work undertaken on individual elements from other Councils
- Industry knowledge of TRC and Council officers participating in this study.

It should also be noted that the cost estimates used for this feasibility and business case are not based on engineering assessments and as such can only be relied upon for the purposes of assessing the economic feasibility and for budgeting purposes.

For the purposes of this feasibility study and business case, the capital construction costs are also split between Gippsland and non-Gippsland Council/land managers. This is to enable funding from different sources to be applied for by the various Council forums. This includes a previous economic impact assessment and business case undertaken by SSG economics that considered the extension to the Bass Coast and South Gippsland Council areas.⁴²

The following table provides the estimate of costs for the trail.

Table 6. Table of Section Costs – The Gippsland Trail

SECTION	LENGTH (KM)	COST ESTIMATE (\$ M)	COMMENTS
Clyde to Koo Wee Rup	16 km	\$1.3 m	Based on Council advice and taken from the SGS Economics report 2019. No cost escalation assumed (Note – outside Gippsland)
Koo W Rup to Nyora	23 km	\$10.6 m	Based on Council advice and taken from the SGS Economics report 2019. No cost escalation assumed. Higher per metre rate due to significant bridging over wet areas at Koo Wee Rup. (Note – outside Gippsland)
SUB TOTAL NON-GIPPSLAND	39 km	\$11.9 m	
Nyora to Woolamai	21 km	\$9.9 million	Based on Council advice and the taken from the SGS Economics report of 2019. Higher per metre rate due to land tenure issues and bridging.
Nyora to Leongatha	36 km	\$5.9 million	Based on Council advice and the taken from the SGS Economics report of 2019. Uses existing rail alignment and bridges (most).
Welshpool to Alberton	22 km	\$4 million	Estimate provided by Councils (Wellington and South Gippsland)
Wonthaggi to Inverloch	15km	\$6 million	Based on advice from Council and other sources

⁴² SGS Economics. Extension of the Great Southern and Bass Coast Rail Trails: Cost Benefit Analysis and Economic Impact Assessment. August 2019.

SECTION	LENGTH (KM)	COST ESTIMATE (\$ M)	COMMENTS
Inverloch to Koonwarra	10 km	\$0.1 million	Based on an average rate of \$10,000 per km for safety improvements as appropriate
Port Albert to Loch Sport	152 or 169 km	\$1.7 million	Based on an average of \$10,000 per km for signs, marking of roads, some verge widening etc.
Upgrades to the East Gippsland Rail Trail	96 km and Lakes Discovery Trail	\$1 million	Estimate of works required to upgrade components of the trail
Rebuilding of the Orbost Viaduct Bridge over the Snowy Plains		\$3 million	Business Case Assessment by RDV 2019
Off road trail construction – Paynesville to Bairnsdale	16 km	\$1 million	Partial off road where road reserves and other land is available
Upgrades to the Gippsland Plains Rail Trail	63 km	\$0.5 million	Estimate of works required including some off-road completion
Moe to Yarragon	33 km (approx.)	\$0.33 million	Estimate based on \$10k per km of on road trail for safety improvements and signage
Yarragon to Warragul Off Road Path	15 km	\$4.6 million	Estimate based on advice and expert knowledge
Marketing and Website		\$0.2 mill	Initial investment to get the website and marketing established
Other Infrastructure		\$1.9 million	Carparks, toilets, signs, and other general infrastructure as required.

Total for the Gippsland Component \$40.13 million

Total for the Non-Gippsland Component \$11.9 million

Total for the Gippsland Trail (including Clyde to Nyora) \$52.03 million

7. Planning and Strategy Alignment

The proposed Gippsland Trail takes its lead from, and builds on, relevant government strategies and plans published across tourism and destination management.

Several important regional and State-wide reports and strategies have been developed in recent years which provide the strategic context for the proposed trail. The table below provides a summary of some of relevant ones.

Table 7. Previous Reports and Strategic Alignment

REPORT	CONTENT RELATED TO THE PROPOSED GIPPSLAND TRAIL
Gippsland Tracks & Trails Feasibility Study (2019)	Recommends the development of this feasibility study into the Gippsland Trail concept and highlights the need for 'hero' or 'signature' trail development as a priority for the Gippsland region.
Gippsland Destination Management Plan (2019)	Inclusive of the recommendation to "Develop signature or hero experiences, which will become the lead products for Gippsland as well as supporting experiences and services required to ensure visitor satisfaction." And "Develop a framework for sustainable growth of the visitor economy, leveraging the attributes, businesses and activities quintessential to Gippsland. Identify potential new opportunities that can assist in growth and yield, have the potential to attract investment and/or revitalise existing assets. The Gippsland Trail aligns with the DMP's primary 'Experience Themes' including as a Hero Experience and Support Experience.
Victorian Trail Strategy 2014-2024	Victorian State Government - provides the strategic context for trails and outlines the importance of tourism and nature-based products to Victoria. The strategy provides investment criteria for the guidance on which trails to invest in.
Gippsland Regional Plan – 2015 to 2020	A partnership between the leadership of Gippsland, including all three levels of government, RDA, the Committee for Gippsland, the Regional Managers Forum, GLN and other groups. The plan focuses on Economic Prosperity, Education and Community Wellbeing, Natural Environmental Stewardship, Connectivity. Specific to the trails feasibility studies and reinforcing potential strategic directions are the directives to attract investment in Gippsland's public parks and the adaptation to climate change.
Central Gippsland Public Land Strategy 2018, DEWLP	The Strategy aims to increase tourism-related jobs by 2,600. References Tasmania taking a lead in seeking investment in private infrastructure and trails tourism and recommends Gippsland has the core ingredients to do similar.
Cycling in Baw Baw Feasibility Study 2020 Baw Baw Council	The study in draft form recognises the opportunities for increased cycling in the Shire. It also directly recognises the extension of the Two Town Trail (Drouin to Warragul) to Yarragon which will significantly benefit the Gippsland Trail Concept.
Extension of the Great Southern and Bass Coast Rail Trails: Cost Benefit Analysis and Economic Impact Assessment. SGS Economics 2019.	The Business Case outlines the case for the extension of the BCRT and GSRT and provides a positive economic assessment of the case for their extension and investment in the rail trails.
Bass Coast Pathways Plan 2017.	A plan that seeks to objectively assess the pathways in the Bass Coast that are required. 53 aspirational pathways across the Shire identified.
Latrobe City Council Tracks Trails and Paths Strategy 2017	Latrobe is the largest municipality in Gippsland with a population of 72,000 and this strategy looks at among other elements the health benefits to residents who are generally more disadvantaged than many other municipalities and have lower health outcomes.

REPORT	CONTENT RELATED TO THE PROPOSED GIPPSLAND TRAIL
	<p>Several intertown links are proposed between major towns including Traralgon and Morwell, and Moe and Yallourn North.</p> <p>Aspirational links mentioned in the plan include:</p> <ul style="list-style-type: none"> • Link to Yallourn North from Moe Yallourn Rail Trail • Link from Moe to Morwell
South Gippsland Shire Council – Paths and Trails Strategy 2018.	<p>Sets a vision for a central rail trail as an active corridor and the project list has this as a focus.</p> <p>2018 projects include the extension of the Great Southern Rail Trail to Nyora.</p>
Wellington Shire Council Walking and Cycling Strategic Plan 2012 - 2016	<p>The objectives are focussed on healthy, liveable, and active communities and include:</p> <ul style="list-style-type: none"> • Guiding the development of walking and cycling trails to encourage residents and visitors to become involved in activity • Finding destinations for walking and cycling • Removing barriers that discourage the use of infrastructure for recreation, health, and well-being as well as commuting • Guiding new developments to ensure future provision of walking and cycling infrastructure • Promoting in partnership with the community, the benefits of walking and cycling.
East Gippsland Shire Council. Gippsland Lakes Discovery Trail	<p>Feasibility and route assessment to link the Gippsland Rail Trail to the coastal township of Lakes Entrance.</p> <p>Route is described through Colquhoun and Palmers Rd.</p>
East Gippsland Shire Council. East Gippsland Rail Trail – Strategic Business Case. April 2019	<p>Makes a strong case for continued investment in the EGRT. Forecasts doubling of trail users over a 10-year period and a Benefit Cost Ratio of 2 for an investment of \$0.88 million.</p>

This is a scan of the available high-level strategy and plans that may influence the proposed development of the trail. It is also acknowledged that there are many other ‘Statutory’ approvals that would be required to be achieved for the trails to proceed, assuming that it is taken forward to the next phase. These considerations might include but not be limited to:

- Native Vegetation Policy and its implications for construction of new trails
- Environmental Considerations including the protection of threatened species
- Cultural Heritage and the need for a Cultural Heritage Management Plan or survey
- Fire and Emergency requirements including building code issues for infrastructure
- Council and VicRoads safety considerations.

Many of these items would need to be considered in the development of section plans for the proposed trail which would consider these ‘approval’ and other regulatory and statutory issues in more detail.

8. Opportunities

This section investigates the opportunities that could arise from the development of the proposed Gippsland Trail. The following are not exhaustive, and others will emerge over time.

Gippsland Smart Specialisation Strategy

The scale of the trail design, build, operation, and maintenance required strengthens the opportunity to leverage regional growth initiatives such as the Gippsland Smart Specialisation program (RMIT / Melbourne University / Latrobe Valley Authority) under its innovation stream.

The scale and length of the trail provide a very significant piece of trail infrastructure that requires design, construction, and maintenance each year. While it is acknowledged that the design of the off road shared pathway is different to the 'art' of designing a mountain bike trail, and that Council engineering services normally prepare specifications for works, considerable trails expertise could feasibly be developed within a Gippsland 'entity'.

Ride Nation / Gippsland Ride Centre

Cycling Australia's strategy to build participation in bike riding has a dedicated participation brand 'Ride Nation' and aims for more people to enjoy riding their bike – regardless of age, circumstance, skill level and location.

The online program endorses current riding programs and activities being delivered around the country and builds value adding partnerships to support these to achieve greater reach. The brand will be realised via digital spaces, physical spaces, and school programs. The Ride Nation presents an opportunity for the Gippsland Trail, in addition to the two (2) other Gippsland MTB projects currently being considered as part of the feasibility process, to engage and achieve exposure to a targeted community, while giving tour operators and coaches a forum to market their experiences. As part of the Ride Nation program, a series of designated physical 'Ride Centres' are being created – currently in Ballarat and Wollongong. It is planned that Warragul will host a centre representing Gippsland as a Ride Centre.

The development of the Gippsland Trail in addition to the G7 and the Baw Baw Epic Downhill Ride will support the Ride Centre in Warragul.

More information can be found at www.ridenation.com.au/

Business Incubation

The development of the Gippsland Trail not only presents a range of social, community and economic benefits, it aids in delivering opportunity to many areas impacted by the 2019 fires (East Gippsland) as well as recovering from drought and COVID 19.

The economic impact assessment component of this business case describes the sectors in which business activity will grow from this proposal. By way of example, the opportunity for a 'water-taxi' between Loch Sport, Sperm Whale Head, Paynesville, Metung, and Lakes Entrance would not be viable without a trail such as this. It may still be marginal but further opportunities add scale and to the likely take up of the opportunity by the private sector.

Events & Tours

The potential for events and tours involving the trail should be integrated into any future brand and marketing strategy, with considerations to further economic stimulus and exposure outcomes. Events drive not only event period visitation and extended visitor stay spend, they also drive return visitation outside of event periods, and create high visibility digital marketing outcomes in terms of social media.

Events differ for a trail of this type and tend not to be so competitive as for MTB trails. Examples of events could include fun runs, Pram Walks, and other 'community' type events that if done well and marketed effectively could not only lift the profile of the trail, but also help deliver economic and positioning benefits for the destinations.

PR & Marketing

As with any major nature-based tourism attraction, marketing and PR play a significant role in creating destination visibility, which translates into impacting 'front of mind' destination decision making. Traditional media articles and specifically, social media user-generated exposure via imagery, commentary and recommendation plays a powerful role in making Gippsland a destination of choice. Product such as the Gippsland Trail with inherent inspirational landscapes and associated visual content outputs (above the line marketing and user-generated), provides a collective anchor for online and in-media visibility. It also works to deliver visitation not just directly on trail, but to the broader Gippsland region, with off-trail attractions gaining complementary exposure.

9. Economic Impact Assessment

This section provides an economic impact assessment of the proposed Gippsland Trail development and connections. The results are indicative of the potential benefits from the development and operation of the trail network. The modelling is based on estimates of annual rides/users (in different categories), and other assumptions utilised in quantifying spending in the region.

For operations, several types of users are identified:

- locals from the Gippsland/Bass Region
- visitors from Melbourne and surrounds
- users from other regions
- interstate visitors
- international visitors.

The economic impacts of the trails arise from:

1. spending by these users/visitors in the towns adjacent to the trail and other spending in the broader region; spending associated with events
2. health benefits of active recreation activities
3. a notional value of the trails to individual users.

Visitors from outside the region (particularly domestic and international overnight visitors/users) generate significant expenditure covering:

- food and beverage
- accommodation (for overnight stayers)
- recreation and other services
- transport.

Trail Users and Spending

Trail Users / Visitors

There is limited direct information on trail users. Trail use numbers have been estimated for a 10-year period of operations for several user categories. These user categories include:

- locals – Gippsland/ Bass Region
- other Regional Users
- visitors from Melbourne and Surrounds
- interstate Visitors
- international Visitors.

Assumptions were also applied to estimate the number of day visits and overnight visits in each category.

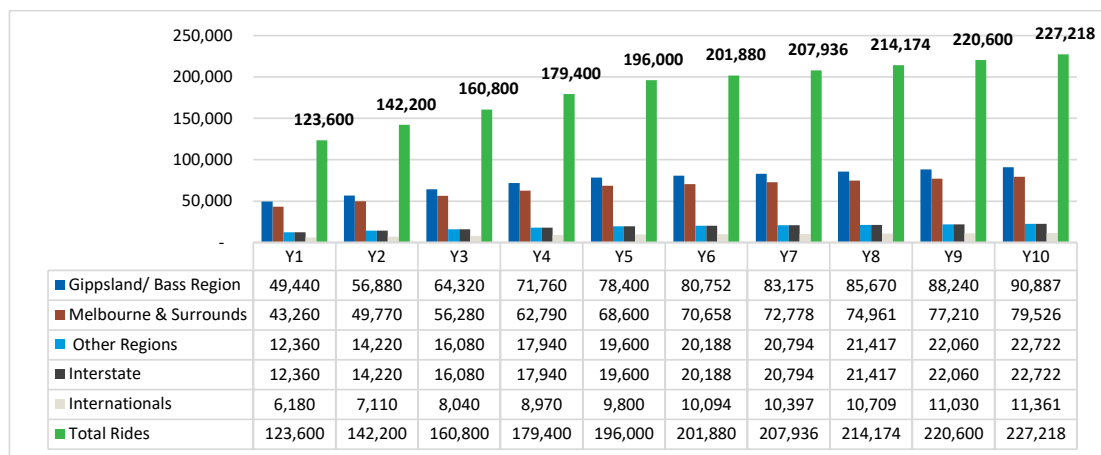
The 10-year modelling was based on:

- calculating a base estimate of rides on the trail using the data and assumptions (year 5 of trails operations)
- allowing for establishment of the trail in the market and initial growth in users (60% of base in year 1, 70% in year 2, 80% in year 3, 90% year 4)
- subsequent growth is based on a growth rate of 3% per year from years 6-10. The number of rides on the trails were estimated for the user groups.

Rides on the trails are projected to increase from 123,600 in Year 1 to around 227,000 in year 10.

The figure and incorporated data below provide the estimate for the trail user numbers.

Figure 18. Gippsland Trail Rides Years 1-10 (annual estimates)

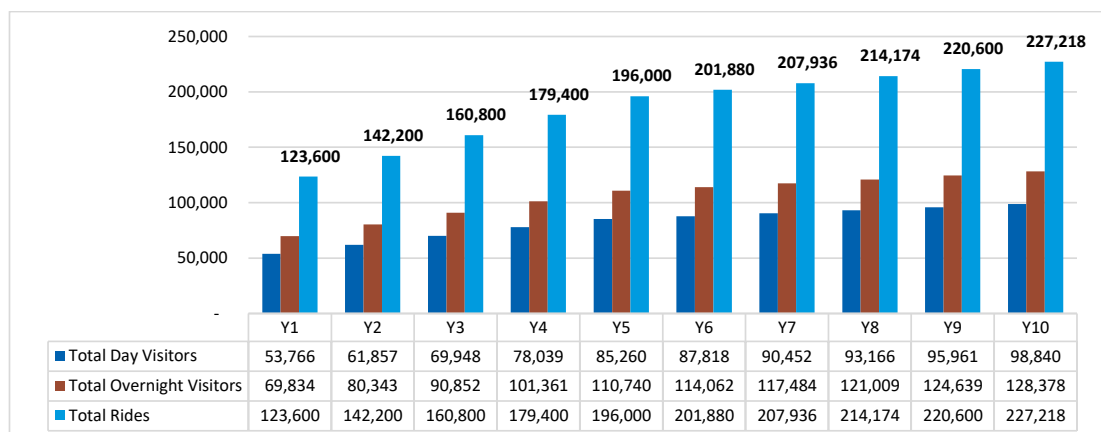


Source: MCA modelling & estimates, May 2020

Estimates were made of day visitors and overnight visitors based on several assumptions in relation to each of the trail user groups.

Breaking the data down further, the following figure provides the users by day visitors and overnight visitors.

Figure 19. Total Rides on Trails by Visitor Types Estimates Years 1-10 (number)



Source: MCA modelling & estimates, May 2020

The table below provides the information by day and overnight visitors by visitor source.

Table 8. Gippsland Trail Rides – User Groups and Visitor Types – Estimates Years 1 to 10 (no.)

Rides on Trail	Y1	Y2	Y3	Y4	Y5	Y6	Y7	Y8	Y9	Y10
Day Visitors										
Gippsland/ Bass Region	39,552	45,504	51,456	57,408	62,720	64,602	66,540	68,536	70,592	72,710
Melbourne & Surrounds	8,652	9,954	11,256	12,558	13,720	14,132	14,556	14,992	15,442	15,905
Other Regions	3,708	4,266	4,824	5,382	5,880	6,056	6,238	6,425	6,618	6,817
Interstate	1,236	1,422	1,608	1,794	1,960	2,019	2,079	2,142	2,206	2,272
Internationals	618	711	804	897	980	1,009	1,040	1,071	1,103	1,136
Total Day Visitors	53,766	61,857	69,948	78,039	85,260	87,818	90,452	93,166	95,961	98,840
Overnight Visitors										
Gippsland/ Bass Region	9,888	11,376	12,864	14,352	15,680	16,150	16,635	17,134	17,648	18,177
Melbourne & Surrounds	34,608	39,816	45,024	50,232	54,880	56,526	58,222	59,969	61,768	63,621
Other Regions	8,652	9,954	11,256	12,558	13,720	14,132	14,556	14,992	15,442	15,905
Interstate	11,124	12,798	14,472	16,146	17,640	18,169	18,714	19,276	19,854	20,450
Internationals	5,562	6,399	7,236	8,073	8,820	9,085	9,357	9,638	9,927	10,225
Total Overnight Visitors	69,834	80,343	90,852	101,361	110,740	114,062	117,484	121,009	124,639	128,378

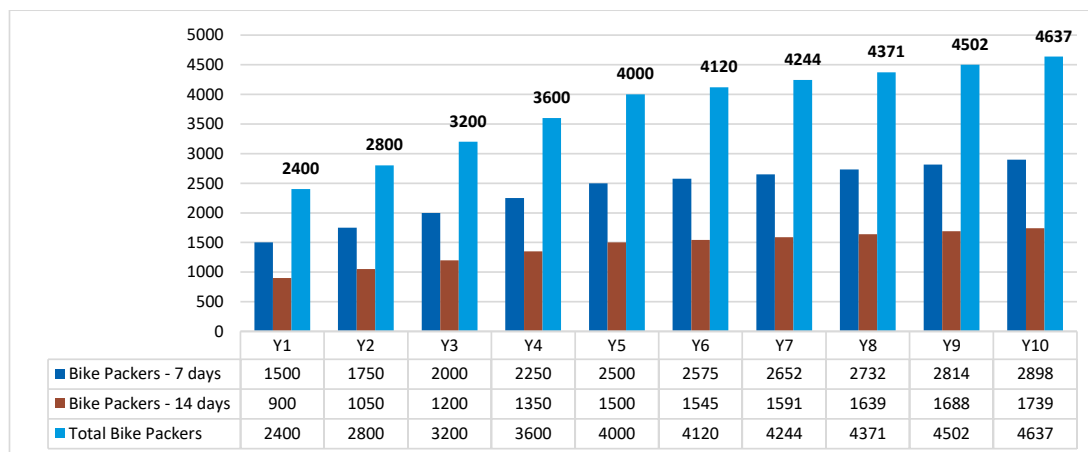
Source: MCa modelling & estimates, May 2020

Bike Packers

Bike packers are a special segment who have an extended trip on the trails. We have assumed that these will comprise 4000 riders in year 5 (2500 - 7-day rides and 1500 - 14-day rides).⁴³

Rides increase from 2400 in year 1 to 4637 in year 10.

Figure 20. Bike Packers on Gippsland Trails – Years 1-10 (no.)



Source: MCa modelling & estimates, May 2020

⁴³ It is assumed that the growth in this segment is in line with general users (60% of year 5 base in year 1, 70% in year 2, 80% in year 3, 90% year 4); and subsequent growth is based on a growth rate of 3% per year from years 6-10.

Spending in Region – Day and Overnight Visitors

Spending in the region was estimated based on a range of information, including the recent TRA Local Government Profiles, combined with several assumptions on spend rates and the mix of visitors/trail users.

The table below provides information on the assumptions used for the length of stay and average spend per visitor.

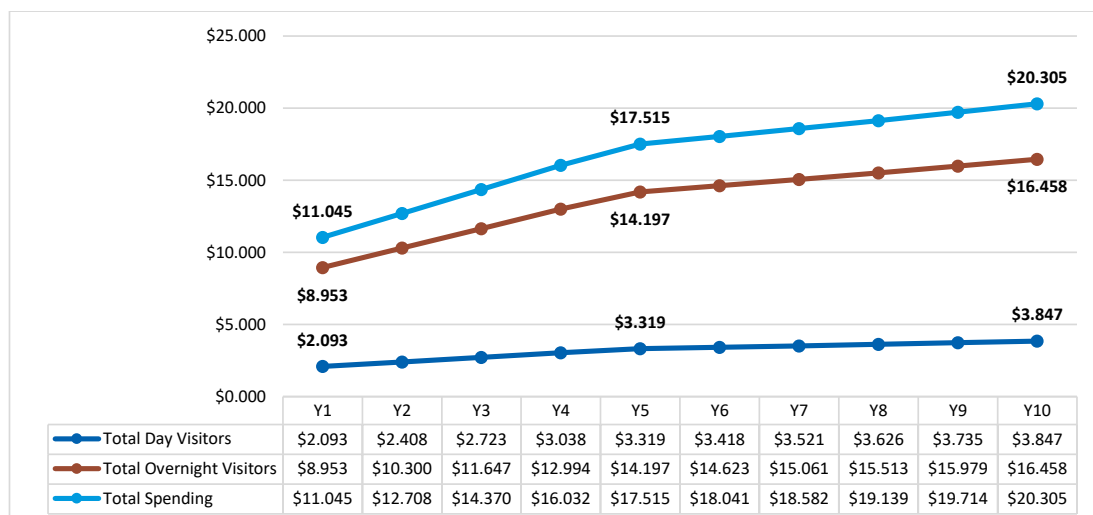
Table 9. Assumptions Used in Modelling Gippsland Trails User Spending

Modelling Assumptions	Users Mix		Overnights Length of Stay			Average Spending (per day) ⁴⁴	
	Day Visitors %	Overnight s Visitors %	1 night	2 nights	4 nights	Overnight Visitors	Day visitors
Gippsland/ Bass Region	80%	20%	60%	25%	15%	\$128	\$25
Melbourne & Surrounds	20%	80%	60%	25%	15%	\$128	\$78
Other Regions	30%	70%	60%	25%	15%	\$128	\$78
Interstate	10%	90%	20%	50%	30%	\$128	\$78
Internationals	10%	90%	20%	50%	30%	\$128	\$78

Source: MCA modelling & estimates, May 2020

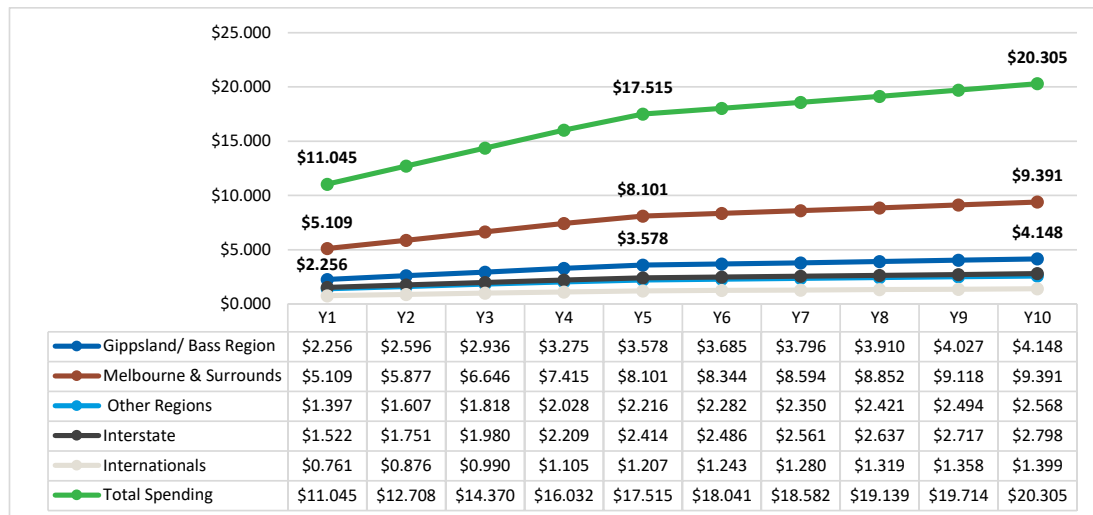
The combination of user numbers by type, average spending and average length of stay is used to estimate annual spending (in constant 2020 dollars) in the region. The following figures show annual spending for each of the visitor types and user groups. Spending in the region by trail users increases from \$11.045 million in year 1 to \$20.305 million in year 10.

Figure 21. Gippsland Trails Spending in Region by Visitor Type (\$million – 2020 prices)



Source: MCA modelling & estimates, May 2020

⁴⁴ Average visitor spending (overnight \$128 and day visitors \$78) is based on an unweighted average for 6 LGAs – Latrobe LGA, Baw Baw LGA, Wellington LGA, Bass Coast LGA, East Gippsland, South Gippsland LGA (TRA Local Government Profiles 2018). Spending by locals – day visitors \$25 is an assumed amount (e.g. coffee/food etc.).

Figure 22. Gippsland Trails Spending in Region by User Group (\$million – 2020 prices)

Source: MCA modelling & estimates, May 2020

The following table shows indicative estimates of spending by category for day visitors and for overnight visitors and events.

Total expenditure comprises:

- spending on trail-linked activities (including spending on bike related expenses and other spending - food and beverage etc.) in proximity to the trails
- spending on accommodation (for overnight stayers) and meals during their stay
- spending on other recreational and other tourism services.

Table 10. Spending by Gippsland Trail Users Year 1-10 Indicative Estimates (\$million – constant prices \$2020)

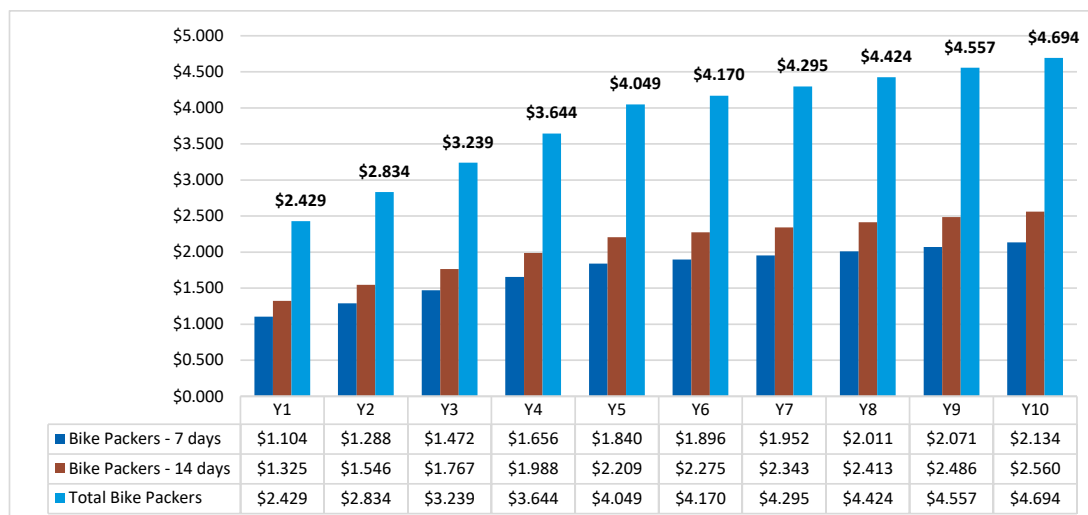
Type of Spending (\$ million)	Share of Spending %	Y1	Y2	Y3	Y4	Y5	Y6	Y7	Y8	Y9	Y10
Total Day Visitors											
Food	65%	\$1.360	\$1.565	\$1.770	\$1.974	\$2.157	\$2.222	\$2.288	\$2.357	\$2.428	\$2.501
Bike Hire	15%	\$0.314	\$0.361	\$0.408	\$0.456	\$0.498	\$0.513	\$0.528	\$0.544	\$0.560	\$0.577
Other Services	5%	\$0.105	\$0.120	\$0.136	\$0.152	\$0.166	\$0.171	\$0.176	\$0.181	\$0.187	\$0.192
Transport	15%	\$0.314	\$0.361	\$0.408	\$0.456	\$0.498	\$0.513	\$0.528	\$0.544	\$0.560	\$0.577
Total Spending - Day Visitors		\$2.093	\$2.408	\$2.723	\$3.038	\$3.319	\$3.418	\$3.521	\$3.626	\$3.735	\$3.847
Total Overnight Visitors											
Food & Accommodation	60%	\$5.372	\$6.180	\$6.988	\$7.797	\$8.518	\$8.774	\$9.037	\$9.308	\$9.587	\$9.875
Bike Hire	20%	\$1.791	\$2.060	\$2.329	\$2.599	\$2.839	\$2.925	\$3.012	\$3.103	\$3.196	\$3.292
Other Services	5%	\$0.448	\$0.515	\$0.582	\$0.650	\$0.710	\$0.731	\$0.753	\$0.776	\$0.799	\$0.823
Transport	15%	\$1.343	\$1.545	\$1.747	\$1.949	\$2.130	\$2.193	\$2.259	\$2.327	\$2.397	\$2.469
Total Spending Overnight Visitors		\$8.953	\$10.300	\$11.647	\$12.994	\$14.197	\$14.623	\$15.061	\$15.513	\$15.979	\$16.458
Total Users											
Food & Accommodation		\$6.732	\$7.745	\$8.758	\$9.771	\$10.675	\$10.995	\$11.325	\$11.665	\$12.015	\$12.375
Bike Hire		\$2.104	\$2.421	\$2.738	\$3.054	\$3.337	\$3.437	\$3.540	\$3.647	\$3.756	\$3.869
Other Services		\$0.552	\$0.635	\$0.718	\$0.802	\$0.876	\$0.902	\$0.929	\$0.957	\$0.986	\$1.015
Transport		\$1.657	\$1.906	\$2.155	\$2.405	\$2.627	\$2.706	\$2.787	\$2.871	\$2.957	\$3.046
Total Spending Users		\$11.045	\$12.708	\$14.370	\$16.032	\$17.515	\$18.041	\$18.582	\$19.139	\$19.714	\$20.305

Source: MCA modelling & estimates, May 2020

Spending in Region – Bike Packers

Spending by this group is significant because of their length of stay (7 and 14 nights). For spending we have assumed an average spend of \$105 per night.⁴⁵ Total spending of this segment is \$2.429 million in year 1 and increasing to \$4.694 million in year 10. The following figure provides the spending by the bike packer grouping.

Figure 23. Bike Packer Spending in the Region (\$million - \$2020 prices)



Source: MCA modelling & estimates, May 2020

Economic Impacts of the Gippsland Trail

The economic impacts of the development of the Gippsland Trails are modelled for both the construction phase and the operations phase. The impacts are measured in terms of:

- full time equivalent jobs (FTE)
- the increase in regional income that is generated by trail users and their spending in the region.⁴⁶

Construction Phase

A significant number of jobs and an increase in regional income will be generated during the construction phase of the project.

Construction Costs

The cost estimates in the following table cover trail construction and other infrastructure. It covers estimates for the Gippsland sections and the total including other sections. The table 11 provides estimates of the construction costs of the trail.

⁴⁵ This average per night spending is less than that for the short-stay overnight visitors and is the unweighted average overnight spending for the 6 LGAs (TRA data).

⁴⁶ Regional income is the total net income generated from the activity and covers wages and salaries of employees and profits of businesses within the region. It includes income generated directly within the business and indirect income, which is generated in other regional businesses (wages and profits) from the multiplier impacts of employee spending on the region. In the modelling of income generated, income tax and GST on spending, are both treated as leakages from the region.

Table 11. Construction Costs – Gippsland Trails Project 2020

Trail Section	Cost Estimate (\$2020 prices)
Gippsland Sections	
Nyora to Woolamai	\$9,900,000
Wonthaggi to Inverloch	\$6,000,000
Nyora to Leongatha	\$5,900,000
Welshpool to Alberton	\$4,000,000
Port Welshpool to Loch Sport	\$1,700,000
Upgrades to East Gippsland Trail	\$4,000,000
Discovery Trail Extension Lakes Entrance	\$625,000
Upgrades to Gippsland Plains Rail Trail	\$500,000
Gippsland Plains Rail Trail (Traralgon to Morwell)	\$1,200,000
Moe to Yarragon	\$330,000
Yarragon to Warragul (off road path)	\$4,600,000
Other Infrastructure	\$2,000,000
Total Gippsland Sections	\$40,755,000
Other Sections	
Clyde to Koo Wee Rup	\$1,300,000
Koo Wee Rup to Nyora	\$10,600,000
Total Other Sections	\$11,900,000
Total All Sections	\$52,655,000

Source: MCA modelling & estimates, May 2020

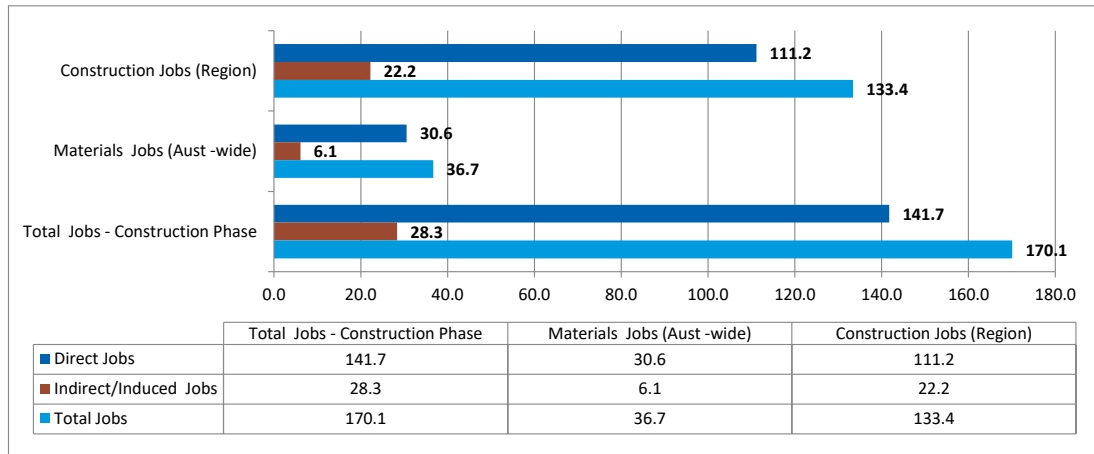
Economic Impacts – Construction Phase

The construction phase jobs and income generated has been divided into two elements – those created through the Gippsland section of the trail, and those created by the whole trail.

The Gippsland component of the trail

A total of 170.1.5 FTE jobs (141.7 direct jobs and 28.3 indirect/induced jobs) would be generated during the construction period for the Gippsland sections. The direct jobs comprise 111.2 jobs in on-site construction and 30.6 jobs in materials/equipment supply. The figure and associated data below show the jobs creates by direct and indirect sources.

Figure 24. Construction Phase Gippsland Trail Jobs FTE Generated (no.)

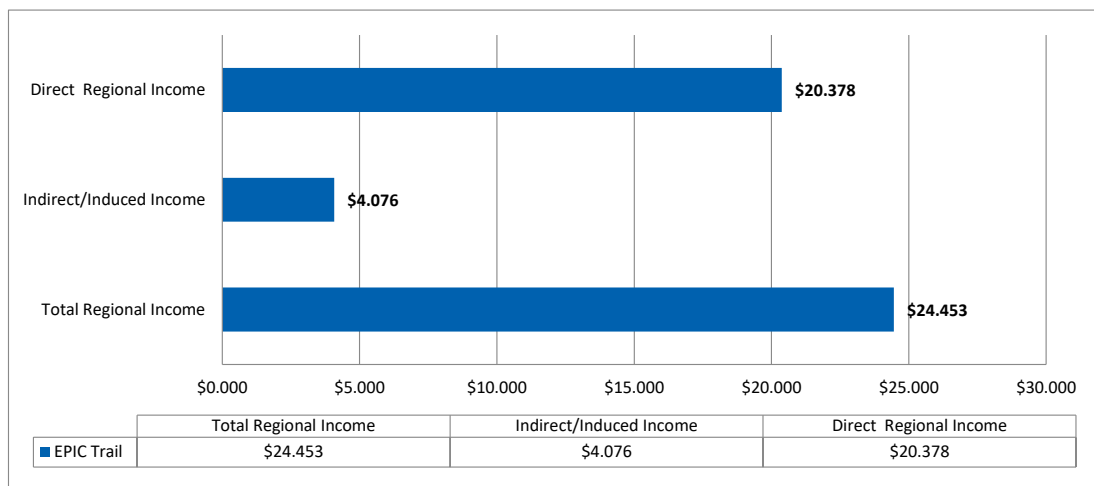


Source: MCA modelling & estimates, June 2020 (Some differences due to rounding)

The following figure shows the increase in regional income generated during the construction of the trail.⁴⁷ During construction a total of \$24.4 million in regional income would be generated (\$20.4 million direct income and \$4.0 million indirect/induced).

The following chart provides the increase in regional income generated during the construction phase of the Gippsland Trail – Gippsland only components.

Figure 25. Construction Phase – Gippsland Trail Segments Increase in Regional Income (\$m 2020 prices)



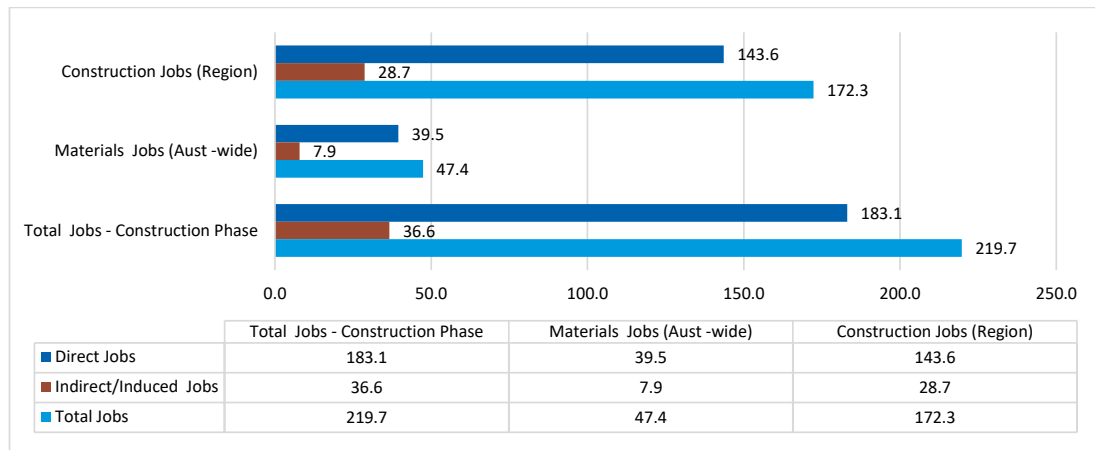
Source: MCA modelling & estimates, May 2020

⁴⁷ This assumes the construction workforce would come from the Gippsland Region and adjacent areas.

The Entire Trail (Including non-Gippsland Components)

A total of 219.7 FTE jobs (183.1 direct jobs and 36.6 indirect/induced jobs) would be generated during the construction period for all trail sections. The direct jobs comprise 143.6 jobs in on-site construction and 39.0 jobs in materials/equipment supply. The figure below provides the jobs created.

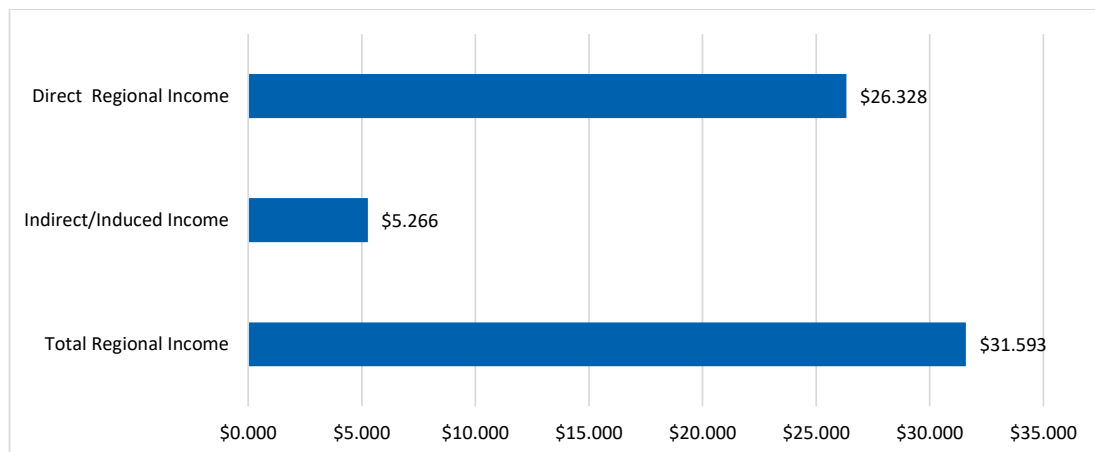
Figure 26. Construction Phase All Trail Sections – Jobs FTE Generated (no.)



Source: MCA modelling & estimates, June 2020

The following chart shows the increase in regional income generated during the construction of all sections of the trail.⁴⁸ During construction a total of \$31.6 million in regional income would be generated (\$26.3 million direct income and \$5.3 million indirect/induced).

Figure 27. Construction Phase All Trail Sections – Increase in Regional Income (\$million 2020 prices)



Source: MCA modelling & estimates, June 2020. Note some differences due to rounding

⁴⁸ This assumes the construction workforce would come from the Gippsland Region and adjacent areas.

Operations Phase

The operations phase economic impacts of the trail are driven by the expenditure of visitors/users in towns adjacent to the trail and in the broader region. MCA’s regional economic model is used to estimate the employment and income impacts of the trail. The model allocates spending across relevant industry sectors and takes account of the significant shares of the gross spending by visitors/users, which leaks out of the region.⁴⁹

Employment Impacts – Trail Users

The charts and tables below show the increase in jobs in the region generated by each of the user/visitor groups.

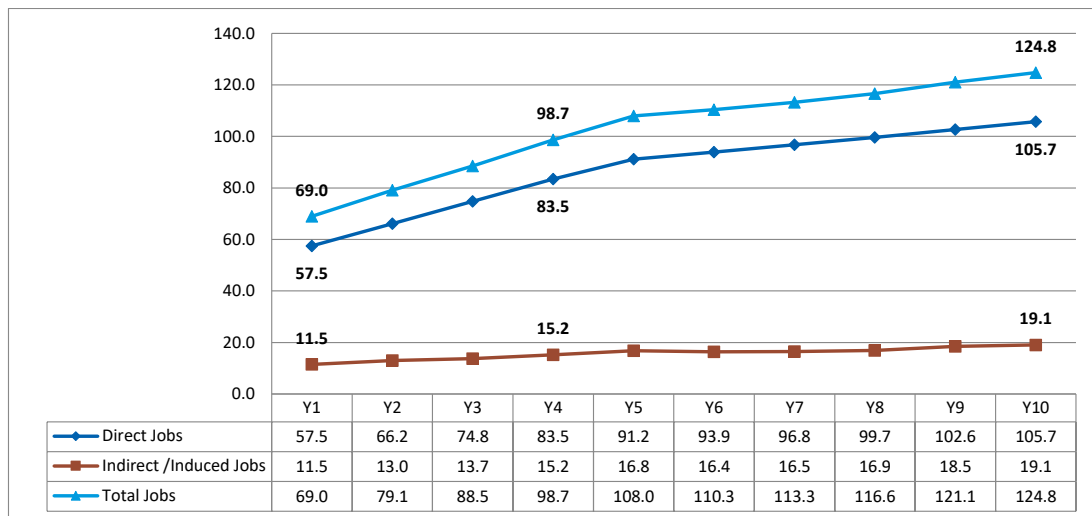
The operation of the trails would generate a total of 57.5 direct full-time equivalent jobs in year 1, increasing to 105.7 direct FTE jobs in Year 10. Total jobs (direct and indirect/induced) are 69.0 FTE in year 1 increasing to 124.8 in year 10.

Of the total jobs in year 10, day visitors would account for 27.4 FTE jobs, overnight visitors for 97.4 FTE jobs.

On a sector basis, the jobs (FTE- direct and indirect) generated by trail users are mainly concentrated in accommodation; food and beverage; recreational services and other visitor services; transport (including shuttles); and other retail.

The chart below provides the total jobs generated by the Gippsland Trail Operations.

Figure 28. Total Jobs Generated by the Gippsland Trail Operations – Year 1 – 10 (FTE No.)

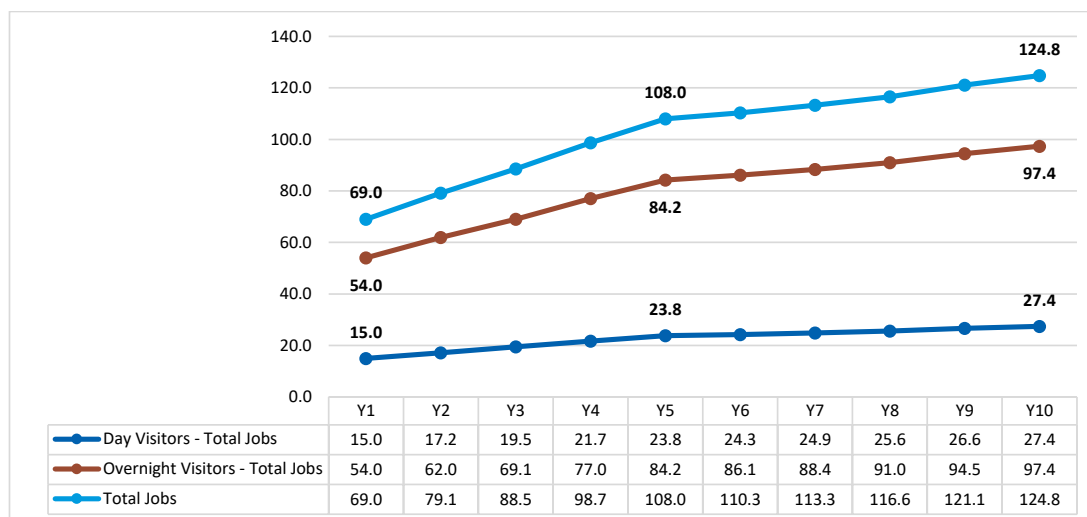


Source: MCA modelling & estimates, May 2020

⁴⁹ The spending by trail users is not the economic impact and does not represent the increase in regional income. There is a major leakage of this spending out of the region due to the GST (10%); and a significant component of the value of services and products purchased by visitors comes from outside the region (e.g. food ingredients, soft drinks, beer, consumer products bought etc.). The model takes account of these leakages and estimates employment impacts and the increase in regional income.

The following chart shows the jobs created by visitor type.

Figure 29. Total Jobs in Region Generated by Trail Operations (FTE No.)



Source: MCA modelling & estimates, May 2020

The following table provides the jobs created by trail user and whether direct or indirect across the years of the trail operation from years 1 to 10.

Table 12. Total Jobs Created by Trail Operations Years 1-10 (FTE No.)

Operations: Jobs Generated by Trail Users/Visitors	Y1	Y2	Y3	Y4	Y5	Y6	Y7	Y8	Y9	Y10
Day Users/Visitors										
Direct Jobs	12.5	14.4	16.2	18.1	19.8	20.4	21.0	21.6	22.3	22.9
Indirect/Induced Jobs	2.5	2.8	3.3	3.6	4.0	3.9	3.9	4.0	4.3	4.5
Total Jobs	15.0	17.2	19.5	21.7	23.8	24.3	24.9	25.6	26.6	27.4
Overnight User/Visitors										
Direct Jobs	45.0	51.8	58.6	65.4	71.4	73.6	75.8	78.0	80.4	82.8
Indirect/Induced Jobs	9.0	10.1	10.5	11.6	12.8	12.5	12.6	12.9	14.1	14.6
Total Jobs	54.0	62.0	69.1	77.0	84.2	86.1	88.4	91.0	94.5	97.4
Total All Users/Visitors										
Direct Jobs	57.5	66.2	74.8	83.5	91.2	93.9	96.8	99.7	102.6	105.7
Indirect/Induced Jobs	11.5	13.0	13.7	15.2	16.8	16.4	16.5	16.9	18.5	19.1
Total Jobs	69.0	79.1	88.5	98.7	108.0	110.3	113.3	116.6	121.1	124.8

Source: MCA modelling & estimates, May 2020

The development of the trail when coupled with other potential riding proposals such as the G7 and the Baw Baw Epic Ride, will see growth of a local cycle and mountain bike industry service industry.

The industry analysis highlights that total full time equivalent (FTE) jobs generated by trail users will be in:

- recreation services/other services (hire, equipment, servicing, other services etc.) – 38.2 jobs in year 10
- transport (including shuttles) 13.9 jobs in year 10
- accommodation 25.4 jobs in year 10 and
- food and beverage 29.6 jobs in year 10.

The following table explores those jobs created by industry sector.

Table 13. Total Jobs Generated by Trail Users by Industry Years 1-20 (FTE No.)

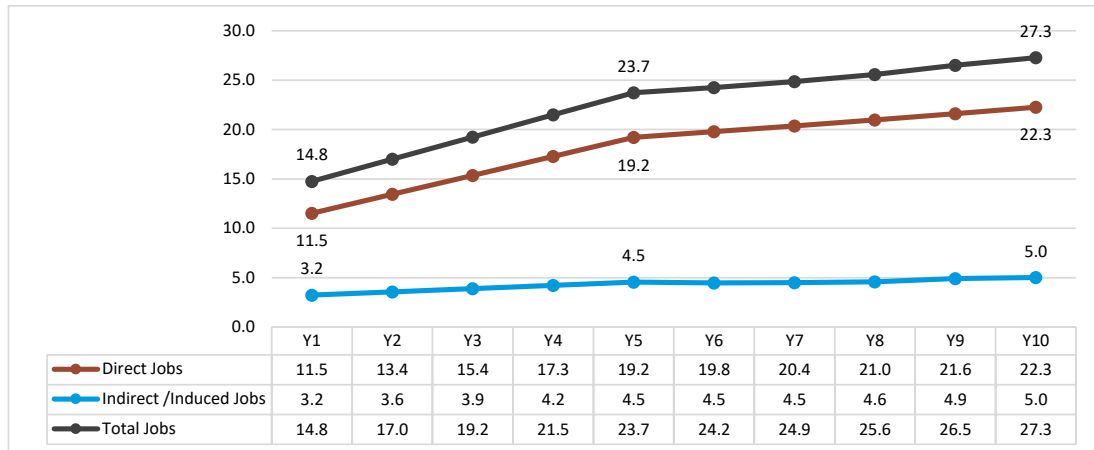
Total All Jobs: Direct & Indirect/Induced										
	Y1	Y2	Y3	Y4	Y5	Y6	Y7	Y8	Y9	Y10
Day Visitors/Users										
Accommodation	0	0	0	0	0	0	0	0	0	0
Food & Beverage	4.0	4.6	5.2	5.8	6.3	6.5	6.6	6.8	7.1	7.3
Recreation Services/Other Services	7.1	8.2	9.2	10.3	11.3	11.6	11.9	12.2	12.7	13.0
Other Retail	1.7	1.9	2.2	2.4	2.6	2.7	2.7	2.8	2.9	3.0
Health	0.2	0.3	0.3	0.3	0.4	0.4	0.4	0.4	0.4	0.4
Transportation	1.5	1.7	2.0	2.2	2.4	2.4	2.5	2.6	2.7	2.8
Communication	0.1	0.1	0.1	0.1	0.1	0.1	0.1	0.1	0.1	0.1
Education	0.1	0.1	0.2	0.2	0.2	0.2	0.2	0.2	0.2	0.2
Miscellaneous Services	0.3	0.4	0.4	0.5	0.5	0.5	0.5	0.5	0.6	0.6
Total	15.0	17.2	19.5	21.7	23.8	24.3	24.9	25.6	26.6	27.4
Overnight Visitors/Users										
Accommodation	13.8	15.9	18.0	20.0	21.9	22.6	23.2	23.9	24.7	25.4
Food & Beverage	12.3	14.1	15.8	17.7	19.3	19.8	20.4	21.0	21.7	22.4
Recreation Services/Other Services	13.9	16.0	17.9	19.9	21.8	22.3	22.9	23.6	24.5	25.2
Other Retail	5.1	5.9	6.4	7.2	7.8	7.9	8.1	8.3	8.8	9.0
Health	0.8	0.9	0.9	1.0	1.2	1.1	1.1	1.2	1.3	1.3
Transportation	6.2	7.1	7.9	8.8	9.6	9.8	10.0	10.3	10.8	11.1
Communication	0.2	0.2	0.2	0.3	0.3	0.3	0.3	0.3	0.3	0.3
Education	0.4	0.5	0.5	0.5	0.6	0.6	0.6	0.6	0.7	0.7
Miscellaneous Services	1.2	1.4	1.4	1.6	1.7	1.7	1.7	1.7	1.9	2.0
Total	54.0	62.0	69.1	77.0	84.2	86.1	88.4	91.0	94.5	97.4
Total Visitors/Users										
Accommodation	13.8	15.9	18.0	20.0	21.9	22.6	23.2	23.9	24.7	25.4
Food & Beverage	16.3	18.7	21.0	23.4	25.6	26.3	27.0	27.8	28.8	29.6
Recreation Services/Other Services	21.0	24.1	27.1	30.2	33.0	33.9	34.8	35.8	37.1	38.2
Other Retail	6.8	7.8	8.6	9.6	10.5	10.6	10.8	11.2	11.7	12.1
Health	1.0	1.2	1.2	1.4	1.5	1.5	1.5	1.5	1.7	1.7
Transportation	7.7	8.8	9.8	11.0	12.0	12.2	12.5	12.9	13.4	13.9
Communication	0.2	0.3	0.3	0.3	0.4	0.4	0.4	0.4	0.4	0.4
Education	0.5	0.6	0.6	0.7	0.8	0.8	0.8	0.8	0.9	0.9
Miscellaneous Services	1.5	1.7	1.8	2.0	2.3	2.2	2.2	2.3	2.5	2.6
Total	69.0	79.1	88.5	98.7	108.0	110.3	113.3	116.6	121.1	124.8

Source: MCA modelling & estimates, May 2020

Employment Impacts – Bike Packers

The following shows the direct and indirect/induced jobs generated by the Bike packers segment. Total jobs in the region increase from 14.8 FTE in year 1 to 27.3 jobs in year 10 as this market develops. Most of the jobs generated would be in accommodation, food services and other retail.

Figure 30. Total Jobs Generated by Bike Packers (FTE No.)



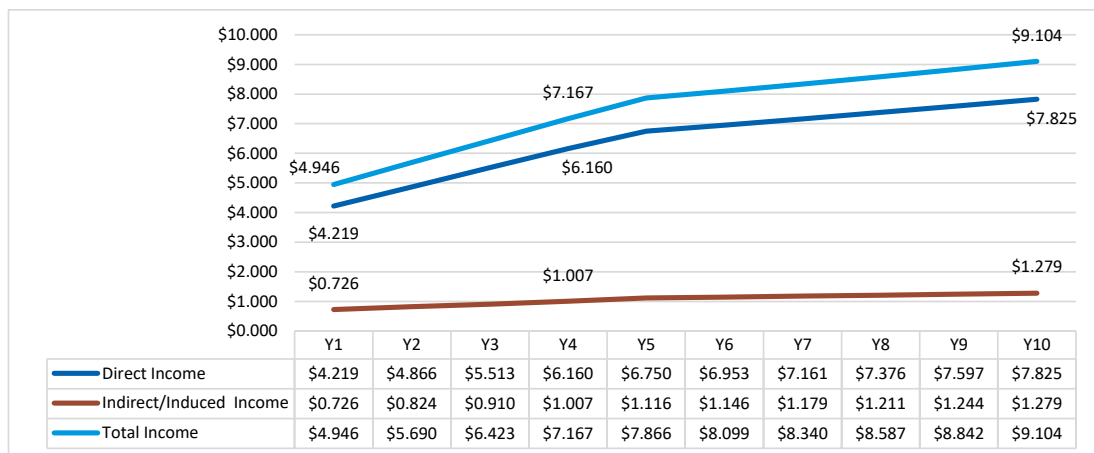
Source: MCA modelling & estimates, May 2020

Regional Income Impacts

The increase in regional income generated annually by the operation of the trails and visitor/user spending (including bike packers) totals \$4.946 million in year 1, increasing to \$9.104 million in year 10.⁵⁰

The increase in regional income (direct and indirect/induced) generated by day visitors/users (including locals and regional users) is \$0.860 million in year 1 and \$1.579 million in year 10. Overnight users/visitors boost total regional income by \$3.245 million in year 1 and \$5.868 million in year 10. The chart below provides this across the years of operation.

Figure 31. Increase in Regional Income Generated by all Trail Users – Years 1-10 (\$million 2020 prices)

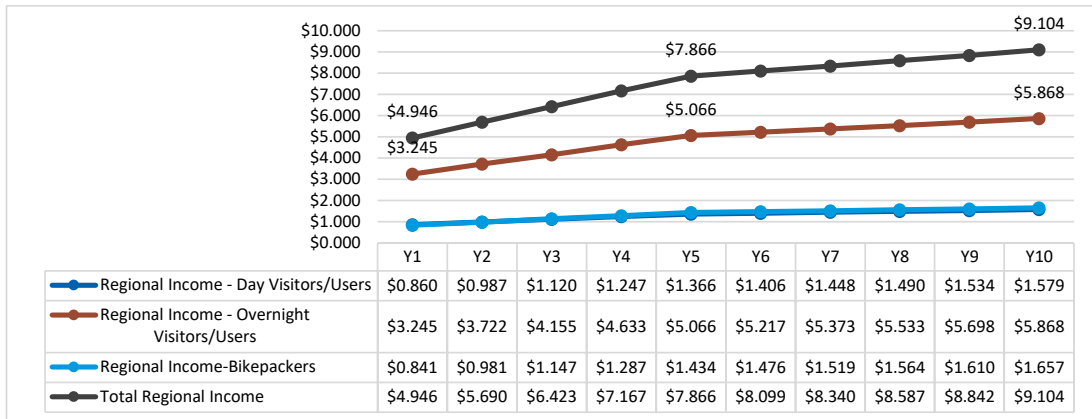


Source: MCA modelling & estimates, May 2020

The following chart shows the increase in regional income across all user types.

⁵⁰ Regional income is the total net income generated from the activity and covers wages and salaries of employees and profits of businesses within the region. It includes income generated directly within the business and indirect income, which is generated in other regional businesses (wages and profits) from the multiplier impacts of employee spending on the region. In the modelling of income generated income tax and GST on spending, are both treated as leakages from the region.

Figure 32. Increase in Regional Income by User Type (\$million 2020 prices)



Source: MCA modelling & estimates, May 2020

Trail Benefits and Costs

The benefits and costs are analysed for a 10-year period.

Trail Costs

The estimated construction cost of the trail project (Gippsland sections) is \$40.755 million, and the 10-year maintenance costs are \$12.226 million (assumed to be \$1.222 million per year over 10 years) for a total 10-year cost of \$52.981 million as shown in the table below.

Table 14. Total Costs of the Gippsland Trail – 10 Year (constant \$2020 prices)

Summary	Trail Development Gippsland Sections <\$ 2020Prices>	Trail Development All Sections <\$ 2020Prices>
Construction Cost		
Trail Construction (Gippsland Sections)	\$40,755,000	\$52,655,000
Maintenance Costs		
Annual Maintenance Cost (3%) ⁵¹	\$1,222,650	\$1,579,650
Total Maintenance (10 Years)	\$12,226,500	\$15,796,500
Total Costs 10 Years		
Total Construction / Maintenance	\$52,981,500	\$68,451,500

Source: MCA modelling & estimates, May 2020

Measuring Benefits – 10 Years

The measured benefits of the trail comprise the increase in regional income generated, the health and benefits, and a notional value to users of the trails.

Increase in Regional Income

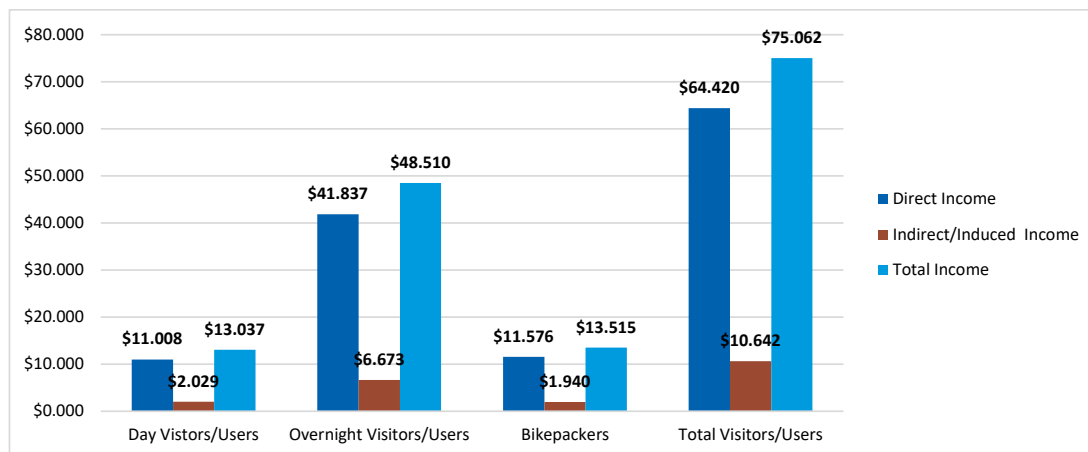
The increase in regional income generated by trail users spending over a 10-year period totals \$75.062 million (in constant \$2020 prices). The table and chart below provide details.

Table 15. Regional Income Generated by Gippsland Trail Users – 10 Year Period (\$million constant \$220 prices)

Increase in Regional Income -10 Years	Day Visitors \$	Overnight Visitors \$	Bike Packers \$	Total Regional Income \$
Direct Income	\$11.008	\$41.837	\$11.576	\$64.420
Indirect/Induced Income	\$2.029	\$6.673	\$1.940	\$10.642
Total Regional Income	\$13.037	\$48.510	\$13.515	\$75.062

Source: MCA modelling & estimates, May 2020

⁵¹ Annual maintenance costs are estimated at 3% of construction cost.

Figure 33. Regional Income Generated by Gippsland Trails – Total 10 Years (\$million constant prices \$2020)

Source: MCA modelling & estimates, May 2020

Health Benefits

A report by Marsden Jacobs Associates indicates that exercise of cycling/active walking in Victorian Parks has net healthcare benefits (in terms of avoided health costs) of \$15 per hour in terms of a reduction in lifetime health costs (adjusted for injury).⁵² For this analysis we have used a conservative figure of \$10 per hour and an average time on trails of 3 hours.

Healthcare benefits are measured as the net (adjusted for injury) avoided costs to the national healthcare system (private costs and government costs) attributable to nature-based outdoor activity.

For the analysis of the trails, we have assumed an average cycle period of 4 hours per day and the health benefits are calculated for Gippsland region and other regional users.

This indirect health benefit is estimated at \$28.107 million over the 10-year period as shown in the table below.

Table 16. Estimated Health Benefits – Local and Regional Users (\$million Constant Prices \$2020)

Health Benefits (Local –& other Regional Users)	Year 1	Year 2	Year 3	Year 4	Year 5	Year 6	Year 7	Year 8	Year 9	Year 10	Total 10 Years
Health Benefits (estimate)	\$1.854	\$2.133	\$2.412	\$2.691	\$2.940	\$3.028	\$3.119	\$3.213	\$3.309	\$3.408	\$28.107

Source: MCA modelling & estimates, May 2020

Consumer Surplus

There are no charges for the use of the trail. However, a valuation can be placed on the experience based on a shadow price or notional charge (what a person may be willing to pay). For the Gippsland Trails we have assumed it to be \$25 per ride. This benefit measure totals \$39.818 million over 10 years for all domestic trail users.

⁵² Victoria's Nature-Based Outdoor Economy- Key Estimates and Recommendations, Marsden Jacobs Associates, January 2016 P10 & 21.

Table 17. Estimated Consumer Value – Domestic Gippsland Trail Users (\$ million Constant \$2020 prices)

Consumer Value	YR 1	YR2	YR 3	YR 4	YR5	YR6	YR7	YR8	YR9	YR10	Total
Consumer value (estimate)	\$2.627	\$3.022	\$3.417	\$3.812	\$4.165	\$4.290	\$4.419	\$4.551	\$4.688	\$4.828	\$39.818

Source: MCA modelling & estimates, May 2020

Benefit Costs Analysis

Gippsland Trail Sections

The following table and chart show the benefits and costs of the operations of the trails over a 10-year period. The benefits are measured by:

- the increase in regional income generated by trail users over a 10-year period
- the estimated health benefits
- the user value.

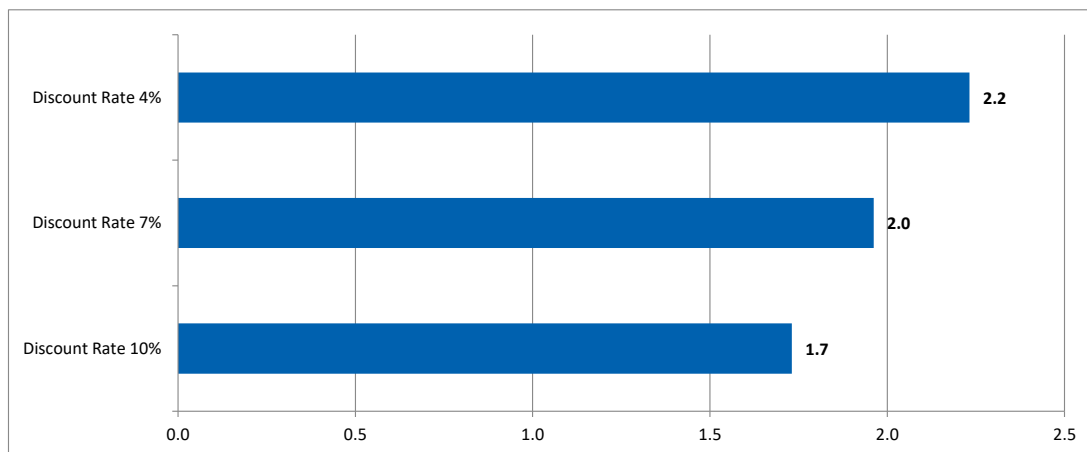
The costs include construction costs, asset maintenance costs and depreciation. For the comparison, the present value of the benefits is calculated using 3 discount rates (4%, 7% and 10%).

Table 18. Benefits and Costs Analysis – Gippsland Trails Sections – 10 Year Period (Constant \$2020 Prices)

Trails Development: 10 Year Operations Period (Gippsland Trails Sections Only)	Discount Rate 4%	Discount Rate 7%	Discount Rate 10%
Costs (10 Years)			
Construction Costs (\$) (2020 prices)	\$40,755,000	\$40,755,000	\$40,755,000
Costs - Asset Maintenance (3% per year- 10 years)	\$12,226,000	\$12,226,000	\$12,226,000
Total Capital Costs	\$52,981,500	\$52,981,500	\$52,981,500
Benefits to Region (10 Years) -			
Regional Benefits (increase in regional income generated)	\$75,062,433	\$75,062,433	\$75,062,433
Indirect Benefits (health benefits – local & other regional users only)	\$28,107,125	\$28,107,125	\$28,107,125
Direct Benefits - User Value (shadow user price)	\$39,818,427	\$39,818,427	\$39,818,427
Total Benefits (2020 Prices)	\$142,987,985	\$142,987,985	\$142,987,985
Total Benefits (\$) Present Value	\$118,262,158	\$103,929,348	\$91,721,382
Net Present Value (\$)	\$66,280,658	\$51,947,848	\$38,739,882
NPV/ Costs	1.2	1.0	0.7
Benefit Cost Ratio (BCR)	2.2	2.0	1.7
<Total Benefits: Present Value/Total Capital Costs>			

Source: MCA modelling & estimates, May 2020

The chart below compares Benefit Cost Ratios (BCR) for the 3 discount rates. For a trail project a 7% discount rate is appropriate, and the project yields a positive BCR of 2.0. The present value of total benefits (\$103.929 million) generated by the investment are 2 times the total costs of the project (\$52.891 million) over a 10-year period.

Figure 34. Benefit Cost Ratio (BCR) – Gippsland Trails Development (Gippsland Sections)

Source: MCA modelling & estimates, JUNE 2020

All Trails Sections

The following table and chart show the benefits and costs of the operations of the trails over a 10-year period. The benefits are measured by:

- the increase in regional income generated by trail users over a 10-year period
- the estimated health benefits
- the user value.

The costs are for all trails sections and include construction costs, asset maintenance costs and depreciation. For the comparison, the present value of the benefits is calculated using 3 discount rates (4%, 7% and 10%).

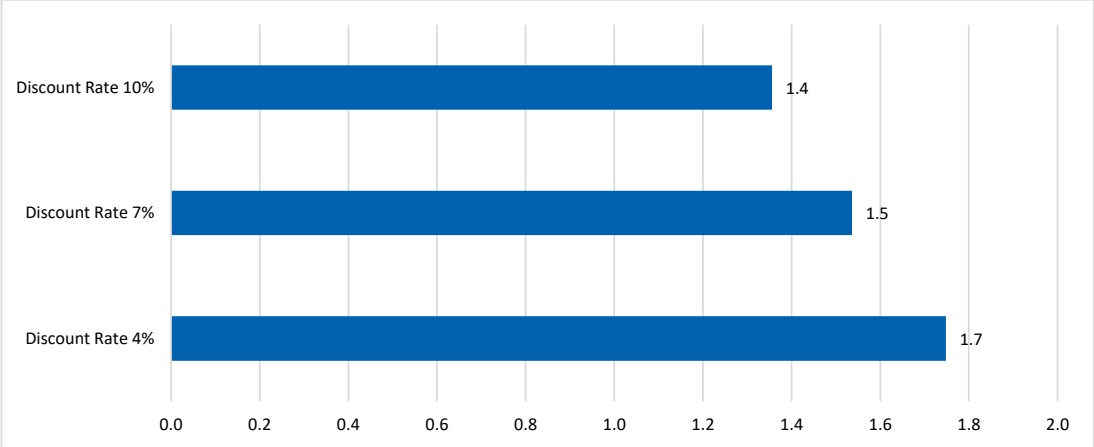
Table 19. Benefits and Costs Analysis – All Trail Sections – 10 Year Period (Constant Prices \$2020)

Trails Development: 10 Year Operations Period (All Trails Sections Only)	Discount Rate 4%	Discount Rate 7%	Discount Rate 10%
Costs (10 Years)			
Construction Costs (\$) (2020 prices)	\$52,655,000	\$52,655,000	\$52,655,000
Costs - Asset Maintenance (3% per year- 10 years)	\$15,796,500	\$15,796,500	\$15,796,500
Total Capital Costs	\$68,451,500	\$68,451,500	\$68,451,500
Benefits to Region (10 Years) -			
Regional Benefits (increase in regional income generated)	\$75,062,433	\$75,062,433	\$75,062,433
Indirect Benefits (health benefits – local & other regional users only)	\$28,107,125	\$28,107,125	\$28,107,125
Direct Benefits - User Value (shadow user price)	\$39,818,427	\$39,818,427	\$39,818,427
Total Benefits (2020 Prices)	\$142,987,985	\$142,987,985	\$142,987,985
Total Benefits (\$) Present Value	\$118,262,158	\$103,929,348	\$91,721,382
Net Present Value (\$)	\$49,810,658	\$35,477,848	\$23,269,882
NPV/ Costs	0.7	0.5	0.3
Benefit Cost Ratio (BCR) <Total Benefits: Present Value/Total Capital Costs>	1.7	1.5	1.3

Source: MCA modelling & estimates, May 2020

The chart below compares Benefit Cost Ratios (BCR) for the 3 discount rates. For a trail project a 7% discount rate is appropriate, and the project yields a positive BCR of 1.5. The present value of total benefits (\$103.929 million) generated by the investment are 1.5 times the total costs of the project (\$68.451 million) over a 10-year period.

Figure 35. Benefit Cost Ratio (BCR) Gippsland Trail Development (All Sections)



Source: MCA modelling & estimates, May 2020

10. Governance and Ongoing Management

Governance

Ongoing collaboration, effective decision making and working together to continue to develop and promote a Gippsland Trail, and more broadly some of the proposed Gippsland wide signature trails that are currently in planning and feasibility stages, is critical to their success. Management of the Gippsland Trail includes the complexities of balancing demands of 6 local government areas (6 Councils of Gippsland), and a number of different incorporated associations that may be managing a section of trail, in addition to raising revenue for the trail's maintenance and ongoing management.

In addition, other State Government and regional agencies and organisations have a direct interest in the management and governance of the trail. These include:

- **Department of Environment Land Water and Planning (DELWP)** – manager of Crown Land including the establishment and governance of committees of management
- **Victrack** – manager of active and non-active rail easements including the leasing of the easements to Council's for rail trail development
- **Sport and Recreation Victoria** – have an active interest in pursuing better recreation and active living outcomes for the community across Gippsland and Victoria
- **Destination Gippsland** – the Regional Tourism Board responsible for promoting Gippsland as well as strategy supporting product and industry development
- **Parks Victoria** – manages much of Victoria's reserve system including elements of the Gippsland Trail where it is proposed to go on existing roads through the Lakes National Park
- **Gunaikurnai Land and Waters Aboriginal Corporation (GLaWAC)** – represents traditional owners and implements the native title settlement of the prescribed area which includes jointly managing 10 Parks and Reserves.

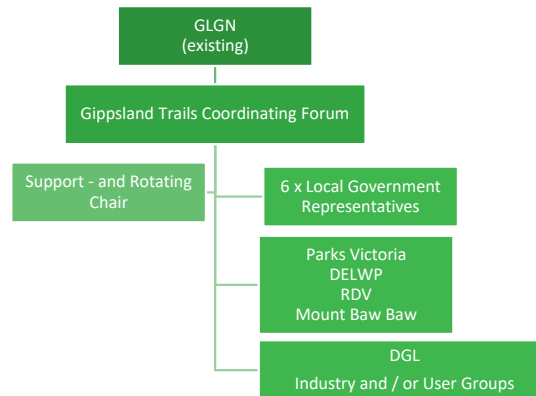
In addition to the Gippsland Trail, there are proposals in development (feasibility and business case stage) for the G7 and the Gippsland Epic Adventure Ride. These trails also require effective multi-agency governance arrangements to be put in place. Aligning the governance needs of all three trails can potentially avoid duplication and provide scale and resources.

As described in the Gippsland Tracks and Trails Feasibility Study, a proposed new group aligned to the existing Gippsland Local Government Network (GLGN) is proposed with a charter to collaborate and develop the general (all user) trails-based visitor economy in a systematic and planned way.

The role of the group is not to direct manage trails, but to provide advice on the strategic planning of the network in alignment with the principles and directions of the Gippsland Tracks and Trails Study (TRC 2019).

The following figure provides the recommended model for coordination.

Figure 36. Gippsland Trails Coordinating Forum Model



A governing mechanism is required to effectively manage the trails in a way that provides the trail with the following:

- Consistent marketing and information on the trail and how to visit, use and enjoy it
- Consistent signs and standards applied to each of the sections, noting the intention to have the original name of the existing trail captured and not be lost (i.e. – The Great Southern Rail Trail – Part of the Gippsland Trail)
- Prioritised works and investment across the various sections
- Advocacy for the Gippsland Trail among other trail products within Gippsland (while taking a regional view on prioritisation through the Gippsland Trails Coordinating Forum)
- Seeking ongoing funding
- Liaison with stakeholders and user groups, including Rail Trails Australia and other peak bodies
- Promoting commercial opportunities across the trail including the options for merchandise
- Coordination of outstanding maintenance issues across the network
- Effective liaison across land managers.

Governance Options

The following options are considered.

Single Agency Management

Table 20. Single Agency Governance Considerations and Options

ATTRIBUTES	STRENGTHS	WEAKNESSES
<ul style="list-style-type: none"> One of the existing Councils or agencies manages the entire trail. 	<ul style="list-style-type: none"> Puts all the necessary skills and capability into one agency that can then make decisions to help make the destination succeed. Easier decision-making processes Can coordinate the activity across all the trail components, including setting consistent standards and marketing / information provision Events etc can be essentially organised/allowed permits under one agency, 	<ul style="list-style-type: none"> The mechanism to get to a single agency manager of the various trail elements would be complex but could be achieved under the Local Government Act Different legislation and policy approaches to Crown Land by the managers make this option difficult to implement Potentially lose local community connection to various trail sections
<ul style="list-style-type: none"> A new or special purpose organisation that becomes the single agency manager. 	<ul style="list-style-type: none"> There are many strengths to this model, including the ability for it to set its own constitution and purpose directly related to the destination. The agency or organisation can establish uniform standards and has direct management control of the trail sections therefor ensuring consistent application of visitor services 	<ul style="list-style-type: none"> A single trail manager across the entire trail would help the trail come to life This option would be difficult for the State Government agencies to be a part of, and may be difficult for Councils to let go of their own managed assets – particularly as some are leased through Victrack

MOU or Partnership

Table 21. MOU or Partnership Arrangement Governance Considerations and Options

ATTRIBUTES	STRENGTHS	WEAKNESSES
<ul style="list-style-type: none"> Agencies or Councils responsible for the trail elements develop an MOU or similar to guide the development and operation of the destination. The agreement can be in the form of a non-binding MOU or more formal agreement that may include licensing provisions under various acts and regulations. 	<ul style="list-style-type: none"> Relatively easy to put in place once the Councils and organisations have determined their role and what the function of the MOU is. An agency or Council can take a lead with the agreement of the participating partners on elements such as trail maintenance etc. Marketing and information on the Gippsland Trail is essential and this model can unite the Councils and RTB behind an agreed information and marketing program which should be led by DGL 	<ul style="list-style-type: none"> MOUs are generally non-binding agreements where parties agree to cooperate around a function or objective. The powers of the agencies involved in the trail sections remain with the Councils or agencies – and may result in duplication for things such as event permits or maintenance

Multiple Agency Management

Table 22. Multiple Agency Management Governance Considerations

ATTRIBUTES	STRENGTHS	WEAKNESSES
<ul style="list-style-type: none"> Essentially this is the do nothing and leave the situation as it is option. 	<ul style="list-style-type: none"> This option is relatively easy to pursue as it leaves Councils, agencies, and land managers in the position that they know and understand. 	<ul style="list-style-type: none"> Significant duplication of effort around management of the trail and a potential watering down of the impact of the trail in national and international markets No one single entity is accountable for the performance and development of the trail May lead to disagreements between Councils and partners management based on differing priorities. Does not provide a single point of contact for the community of users to work through development or other issues. May not result in consistent visitor service standards being applied across the trail sections leading to consumer experience or visitors not experiencing what they are expecting.

Recommended Model

The Gippsland Trail varies in its complexity and operational governance needs compared to the G7 and Epic Rides due in part to the underlying land tenure and management arrangements currently in place. The majority of the proposed Gippsland Trail is located on existing rail trails that are generally managed by a Committee of Management (which is most likely to be a Council or Rail Trail Committee), or on leased Victrack land which is managed by a Council. Small sections of the trail are located on land managed directly by VicRoads or Parks Victoria. Another key reason is that the land is generally (except for the Parks Victoria component) not reserved for its conservation values.

In the case of the G7 and Epic Adventure Ride, there are unresolved issues that preclude a single agency being able to be established. This is in part a result of the nature of the various organisations managing or likely to be a manager of one or more of the G7 hubs.

Development of this feasibility study has continued to expose the complexities in Victorian legislation around the potential for governance entities to be developed to cater for multi-tenure, multi-agency management of recreation and the trail. This is the case across several business case and trail feasibility studies being undertaken across Victoria. Other examples include the proposed development at Warburton and more recently, but in a lesser way, in Omeo (due to DELWP being the majority manager of the proposed trails and the Shire being willing conceptually to become committee of management for the land in question).

It is understood that a review of the Crown Land Acts is underway within DELWP and the government has asked to consider a discussion paper that may lead to a bill before the conclusion of this term of government. This is welcomed and may prove to provide an answer that is better suited to this proposed development, particularly considering the timeframes for this development and the review of the acts.

While there is no clear model emerging from the consultation for the proposed Epic Trail and G7, which have been subject to a separate feasibility study and business case, an MOU will work for the Gippsland Trail with Councils and agencies managing their own elements. The MOU must however have the buy in of the various partners for the collaborative approach to work and to be effective in developing the 'one trail' concept and enabling effective positioning and marketing of the trail.

Leadership of this committee could be through an existing Council, or through DGL. While DGL is not generally a land manager, the MOU leaves land management accountabilities with Councils and other managers.

In some other areas of enterprise, an Incorporated Association would be one vehicle that could be used to help manage and raise the profile of the Gippsland Trail. However, DELWP and Parks Victoria have indicated that it is a policy not to become members of Incorporated bodies due to the issue of Officer and Director liability and risk transfer.

One existing committee that could potentially form the nucleus of the Gippsland Trail leadership group is the Gippsland Trails Coordinating Forum. The function and structure are outlined above. This committee is recommended to have a clear role in priorities setting across all trails in Gippsland, including MTB trails, multi-use trails such as Rail Trails, and walking trails. To try to add in the oversight and coordination of one entity (the G7) may conflict the Forum from the original purpose of its establishment.

Other Considerations

Trails are growing in popularity and the demand is leading to the potential for growth in supply. This study, and the aligned Baw Baw Epic Ride and the G7 feasibility studies have shown that the trails are feasible and will produce a positive economic outcome. The question of whether the proposed governance entity recommended for this product should have a broader role or could be expanded as other multi tenure multi partner also needs to be considered.

It is recommended that the discussions occur with a specific objective of developing a governance framework within Gippsland that enables the objectives of the local government and land management legislation to be honoured, at the same time as providing for the opportunities these trail developments (Gippsland Trail, Epic Trail and G7 Hub) present. The initial discussions could be led by DGL, or LVA and include:

- Latrobe Valley Authority
- Destination Gippsland
- Parks Victoria
- DELWP
- Southern Alpine Resort Management
- Latrobe City
- Baw Baw Shire Council
- Wellington Shire Council
- East Gippsland Council
- South Gippsland Council
- Bass Coast Council
- Rural Roads Victoria
- GLaWAC.

11. Risk Management

This business case demonstrates the potential benefits the proposed Gippsland Trail could bring to Gippsland. Coupled with understanding the benefits, it is also important the risks of the project are understood.

The table below has been prepared showing some of the higher-level risks and proposed treatments.

Table 23. Risks Evident in Gippsland Trail Development

RISK	RATING	RESPONSE / TREATMENT PROPOSED
Only Part Funding is Received	High / Moderate	<ul style="list-style-type: none"> Develop the trail with the highest priority components first. This could include developing marketing and branding in addition to on ground works. Further funding is applied for in later years of the trail's development. Consideration could be given to ensuring the missing links of the existing off road trails are completed as a first priority, and planning continues to resolve State managed on road riding on the two problematic links on the South Gippsland Highway and Inverloch to Venus Bay Road.
Fire or emergency	High	<ul style="list-style-type: none"> Some of the sections of the Gippsland Trail sit in an environment where fire or winter conditions may interrupt visitors or reduce the amenity of the area. Careful thought to emergency management is important from a visitor safety perspective. Fire may impact the area in several ways including devastating large-scale fires such as in 2003, 2009 and 2006/7. Careful planning in some areas around fire and other emergencies is required. This may include increased prescribed burning and fire breaks. It is noted that these elements cannot eliminate the risk but have been shown to reduce it in many areas. Emergency management planning including risk management should sit within the Council or land manager responsibilities for each of the sections. Response will be determined by the type of land the section also sits within.
Approval for one or more sections is not forthcoming	High	<ul style="list-style-type: none"> Should one or more sections have formalisation or trail development denied (based on further planning for each), the Gippsland Trail concept may be significantly delayed or lose critical mass while the issues are resolved. Further planning on some high priority sections has been outlined in the report, as necessary. This includes the existing on road sections, in addition to the Morwell to Moe public transport options. One of the next phases of this proposal would be further planning to define some of those routes and specify in engineering terms the trail type etc. The principles of avoidance should be implemented where any conservation or cultural heritage implications exist.

RISK	RATING	RESPONSE / TREATMENT PROPOSED
The trail concept is put in place, but visitor numbers are significantly below those forecast	Moderate	<ul style="list-style-type: none"> The assumptions are thought to be conservative. The trail manager(s) will need to work hard and partner with Destination Gippsland on promoting the unique attributes of the Gippsland Trail. Events and tour operators may need to play a greater role. Partnerships with outer Melbourne Metro Councils including Casey and Cardinia are vital in ensuring the component of the trail outside Gippsland is also managed to be a part of the Gippsland Trail.
Trail maintenance is not sufficient or effective and the trail experience deteriorates	Moderate	<ul style="list-style-type: none"> Trail maintenance is a critical component of the experience remaining high quality and attracting people to ride the destination. The trail manager(s) will need to take a broader economic benefit into account when considering maintenance expenses. Professional design and construction may limit the annual maintenance costs due to the higher quality trail surface.
Business across Gippsland does not respond to the opportunity	Low to Moderate	<ul style="list-style-type: none"> Services such as bike hire, shuttles/transport (including on water) and rider-friendly accommodation will be important to the success of the Gippsland Trail. Opportunities at smaller towns including those on the 90 Mile Beach and into East Gippsland can be significant but they do require investment.
Competitor pressure	Low	<ul style="list-style-type: none"> Pressure from other new entrants drops the interest in visiting the Gippsland Trail. Marketing of Gippsland needs to carefully position the Gippsland Trail experience as a unique offering.

12. Conclusion

TRC Tourism has assessed the feasibility and economic benefits and costs of the proposed Gippsland Trail. The results are positive and indicate that the trail is feasible and viable to achieve in the form proposed in this report. It is not without some planning issues that need further consideration.

The advantages include continuing to position Gippsland as a centre for trails and cycling capitalising on the advantages Gippsland has including terrain, nature at its finest, villages, climate, and the variation in landscapes.

The issues to be resolved include:

- Developing a marketing strategy for the trail that builds upon the trail as a whole, yet allows for different skills and experiences on different sections (i.e. the Coastal 90 Mile Beach section is more self-reliant and contains on road riding on quieter roads, whereas the Great Southern Rail Trail component provides for easy off road multi use trails)
- Developing further route options for the State managed road options including the two sections described in this report – Inverloch to Venus Bay Road, and a small section of the South Gippsland Highway
- Continuing to work with Latrobe City Council on the route options for off road trails between Morwell and Moe to avoid the public transport option.

The strong economics provide a sound case for progressing with the trail concept. They include the following outcomes:

- Over 170 Full Time Equivalent (FTE) jobs created during construction of the trail and investment of over \$40.7 million in the Gippsland components of the trail
- Over 57 jobs (direct and indirect) created in year 1 of the trail's operation rising to over 124 jobs in year 10 due to growth of the market and visitors
- A Benefit Cost Ratio of 2 based on a 7% discount rate (appropriate for a trail).

Governance of the trail is vital to ensure that each section, while retaining its unique character, fits and grows within a Gippsland Trail context and planning framework.

Business opportunity and community liveability enhancement are both direct outcomes that can be achieved through this investment and it is one the TRC believes will be a success.

APPENDIX A – REFERENCES

Local Government Area Profiles, 2018, Bass Coast LGA, Tourism Research Australia
Local Government Area Profiles, 2018, Baw Baw LGA, Tourism Research Australia
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Victoria's Nature-Based Outdoor Economy- Key Estimates and Recommendations, Marsden Jacobs Associates, January 2016.



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