REGIONAL COMMUNITIES AND CYCLING:

THE CASE OF THE MURRAY TO THE MOUNTAINS RAIL TRAIL, VICTORIA, AUSTRALIA

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EXECUTIVE SUMMARY

Rail Trails provide safe access to many areas in regional Australia, with few traffic or challenging gradient issues. However, they require significant support from government at all levels to establish and maintain. Many trails have been funded during the development stage, but without ongoing maintenance, the standard of these trails will deteriorate. La Trobe University undertook an economic study of three Victorian rail trails in 2003 in order to ascertain the economic inputs into the communities the trails pass through. The study was conducted shortly after the 2003 Victorian bushfires, which will have affected the results, with fewer people using the trails at that time.

In an effort to understand the long-term benefits and issues of Rail Trails and study a trail during a peak time, a further study using a similar methodology, was undertaken in Easter 2006. The results are even stronger than the original survey, suggesting that not only have the trails increased in popularity, but that cyclists are spending more money in the local communities surrounding the trails.

The findings from this research will have relevance for those proposing or managing Rail Trails in Australia.

Acknowledgments

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INTRODUCTION

Rail Trails are multi-user trails developed along defunct rail lines in regional Australia. Initially intended for use by walkers, horse riders and cyclists, cycling has become the dominant activity on many trails, with walkers using them for shorter journeys and horse riders being rarer users, tending to use them as access points to more challenging country.

One of the appeals of the trails for cyclists in particular is that they provide safe access to many areas in regional Australia, with limited vehicular traffic problems (apart from some of the old level rail crossings) or challenging gradients. As trains could not travel up steep gradients, such trails were designed within strict gradient guidelines.

However, they require significant support from government at all levels to establish and maintain, particularly for recreational cycling. Such an activity requires the trails to be hardened to facilitate the use of general road bicycles (as opposed to mountain bikes). Many trails have been funded by public interests during the development stage, but without ongoing maintenance, the standard of these trails will deteriorate.

In 2003, La Trobe University undertook an economic study of three Victorian rail trails in order to ascertain the economic inputs into the communities the trails pass through. Victoria has the most developed rail trails in Australia, with 21 of the 47 major rail trails in Australia, accounting for more than half of the total rail trail length with some 600km of trails (Rail Trails Australia, 2006). Rail Trails Australia defines a major rail trail as being over 4km in length and generally suitable for bike riding.

The study was conducted over the Easter school holiday period, shortly after the 2003 Victorian bushfires, which will have affected the results, with fewer people using the trails at that time. However, it was still found that these trails provided significant economic inputs into the communities through which cyclists passed (Beeton, 2003a, b, c).

In an effort to understand the long-term benefits, growth and issues of Rail Trails and study a well-developed trail during a peak user time, a further study taking the same methodological approach was undertaken in Easter 2006 on the Murray to the Mountains Rail Trail.

After briefly reviewing the publicly available research on Rail Trails and cycle tourism, the study region is described, followed by the methodological approach. The results of the study are then presented, in terms of trail usage and economic input, comparing the economic findings with the 2003 study.

A Review of Current Literature on Rail Trail Research

After undertaking an extensive review of the literature on cycling trails around the world in 2003, Beeton found that there was extremely limited data on the economic contribution of such trails to local communities. A summary of those findings is presented in Table 1, including the 2003 study.

Table 1 Economic Contribution of Cycling Trails around the World

Country	Study	Average per Day in Aust $*
USA	*National Park Service (NPS):*	
	Iowa	14.12
	Florida	16.90
	California (urban)	6.09
	Ohio-Kentucky-Indiana Regional Council:	
	Miami	20.76
	Maine Report:	
	Self-guided	84.33
	Tours	176.32
EUROPE	*England National Study:*	
	Day trips	22.13
	Overnight Trips	358.98
	UK Cycle Paths Survey:	
	Day Trips	17.90
	Holiday makers	60.33
	Switzerland Cycling Routes:	
	Day Trips	32.71
	Holiday makers	136.48
NEW ZEALAND	No quantifiable studies available	
AUSTRALIA	*Consultant's Estimate:*	
	Victoria	$40.69
2003 Study:	**East Gippsland Rail Trail**	**$343.84**
	Murray to Mountains Rail Trail	**$202.74**
	Warburton Rail Trail	**$206.40**
	Victorian Average	**$276.49**

* Australian dollar value calculated on international exchange rates at August 9, 2003

Source: Beeton, 2003b

Surprisingly, three years later there remains limited (if any) studies in the public domain relating to economic inputs and tourism demand, requiring groups interested in developing Rail Trails to undertake their own research, which is usually not practical or possible. Many studies address the health benefits of cycling in general, but tend to ignore other aspects, particularly from an Australian perspective.

Krizek (2006) provides a concise summary of the available literature on cycling, yet only cites reports and papers from the US and Europe, some of which are over ten years old. He found that there are six basic themes in the research: mobility (transport), health; safety; decreased externalities and congestion, livability, fiscal. The fiscal discussion is brief, indicating the limited number of such studies, with very few focusing on the economic benefits to host communities. There is no mention of tourism or its economic benefits.

This ongoing study is one attempt to address this issue by concentrating not only on an overall economic contribution, but also on the host communities through which the Rail Trails travel.

The Study Region: Murray to the Mountains Rail Trail (MTM)

Recognising the need to provide potential visitors to North East Victoria with a significant tourist attraction, in 1997 the shires of Alpine and Indigo along with the Rural City of Wangaratta, proposed to convert the historic path of the disused railways between the three townships of Wangaratta, Bright and Beechworth into a Rail Trail, with the railhead at Wangarratta providing the hub of the network. They argued that "The rail trail would establish a nationally significant tourism product, link existing tourist attractions and preserve magnificent historical structures along the route" (Rail Trails Australia, 2006).

The Murray to the Mountains Rail Trail(MTM) now links the townships of Wangaratta, Beechworth, Myrtleford, Porepunkah and Bright, each with their own heritage tourist attractions, as well providing an introduction to the nearby High Country.

Figure 1. Murray to the Mountains Rail Trail

Source: Rail Trails Australia, 2006

Following historical railway lines, the Murray to the Mountains Rail Trail provides 98km of sealed bitumen track well suited to cycling, horse riding and walking.

Funding and Maintenance of the Trail

The trail has been supported by the state and federal governments, primarily with development funds; however the ongoing maintenance and upgrading costs of the surrounding environment are generally supported by the three local government councils that the trail passes through.

METHODOLOGICAL APPROACH

The MTM Rail Trail was one of three trails used in the previous 2003 study, where it was found that it was a significant trail that attracted visitors as well as local use, presenting some strong results. Through the work of the MTM management committee, the Councils have worked cooperatively to develop and promote the trail, and numerous businesses have taken advantage of the opportunities presented. By studying this trail, which is well developed and considered to be successful from a tourism perspective, an example of the effects of 'best practice' tourism and recreation development can be presented.

The trail has also been successful in linking a number of small, historic towns into a contiguous tourism experience which, it is believed, has contributed significantly to the tourism development of the region in a manner that works with the local, host communities.

A self-completion questionnaire was designed, based loosely on the 2003 survey. Additional questions drill down into levels of satisfaction and travel patterns on the trail.

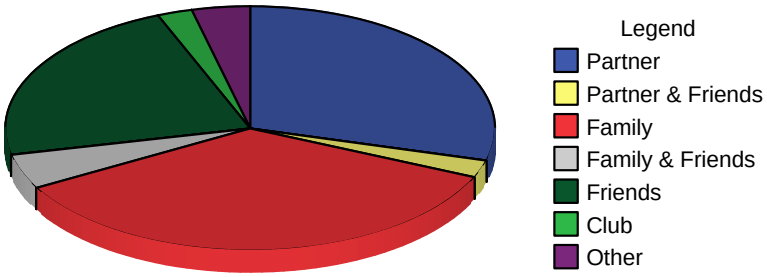
Sample Description

According to data gathered by the Murray to the Mountains Rail Trail Management Committee, there were over 8,328 people estimated to be on the Rail Trail on the Saturday to Monday of the Easter 2006 period. A total of 140 individuals were surveyed, however as recreational cycling is often undertaken in groups, they actually represented 625 people. This brings the survey size to approximately 7.5 percent of the total estimated riders on the trail.

The questionnaires were distributed by members of the Alpine Cycle Club and Wangaratta Bicycle Users' Group under the supervision of MTM management.

Of the 625 cyclists, there was a dominance of men, with 396 male and 239 female participants. As noted above, they all traveled in groups, segmented into the pie chart in Figure 2 below. The primary traveling groups consisted of a partner or family, which may reflect the particular nature of the Easter holiday period, falling as it does in school holidays, but also friends in general rated highly. Due to the developed nature of the trail and proximity to the towns, the MTM Rail Trail is also conducive to groups of missed ability, such as families.

Figure 2. Travel Groups



Ages ranged from small children (1 year old) to some in their 70s. The breakdown of age groups and gender is illustrated in Table 2. With 11 percent of participants being under ten years old, this reflects the strong family oriented nature of this activity, particularly during holiday times such as Easter.

Table 2. Age and Gender of Cyclists on the Trail

Age Group	No. Male	No. Female	Total	% of Total Cyclists
01-10	37	23	60	**11.17**
11-20	51	43	94	**17.5**
21-30	4	11	15	**2.79**
31-40	46	61	107	**19.93**
41-50	71	51	122	**22.72**
51-60	68	43	111	**20.67**
61-70	18	7	25	**4.66**
70+	3	0	3	**0.56**
Total*	**298**	**239**	**537**	**100**

*these totals do not match the total traveling group numbers due to missing responses

Most respondents were employed, with the main employment status of the cyclists being 'professional' (defined as doctor, lawyer etc.), with just under half in this category.

The majority of visitors came from Melbourne, followed by rural Victoria, Sydney, rural NSW, Canberra and Adelaide. Table 3 illustrates the geographic breakdown of the market.

Table 3 Origin of Visitors

Place	Percentage	
Victoria	85	
Melbourne		61
Regional Vic		24
New South Wales	12	
Sydney		8
Regional NSW		4
ACT (Canberra)	2	
South Australia (Adelaide)	2	

Limitations

In order to capture a reasonable sample, this study was conducted during the Easter holiday break. However, as this is an extremely popular time for visitation to the North Eastern region of Victoria, and is the last major break before winter, the results may not be consistent with other times of the year. Nevertheless, we are confident that the findings are sound and comparable to the 2003 study that was undertaken at a similar time.

A further limitation is the sole focus on cyclists on the Rail Trail – the trails were originally developed as multi-use trails for walkers and horse riders as well as cyclists. That said, the primary users amongst visitors are cyclists, and focus here is on that activity.

Finally, there are always issues regarding the self-reporting nature of self-completion questionnaires. This is particularly the case in relation to economic data – people are often vague and at times resistant towards accurately reporting expenditure. For example, one respondent simply replied “lots” in response to the expenditure questions. Due to time and financial issues of data collection, self-completion questionnaires were deemed as the most appropriate approach, but the results should be used with caution – according to some anecdotal evidence, they could be even higher.

RESULTS OF THE STUDY

Just under half (46%) of the sample were visiting the Rail Trail for the first time. The activity of cycling itself rated highly as the main reason for the trip, at 59 percent, while other reasons cited include the opportunity to take a holiday and visit friends and relatives, as shown in Table 4. This is also supported in Table 5 where participants responded to their reasons for visiting the overall region and in Table 10, where they nominated the most enjoyable part of their experience.

Table 4. Other reasons for visiting the trail

Holiday	15
Easter break	9
Visit friends & relatives	11
Relax	2
Ideal surface of path	1

As this was an unprompted, open question, these reasons were top-of-mind for those who responded. Even though only one person mentioned the rail surface, this is of interest. Such reasons can be used in promotional material to encourage those not primarily focused on cycling to participate. Closely related to this question was a further one relating to their reasons for visiting the overall region of North East Victoria. In many ways, this question was used to triangulate the responses to the previous one regarding cycling on the MTM Rail Trail as the motivator to visit.

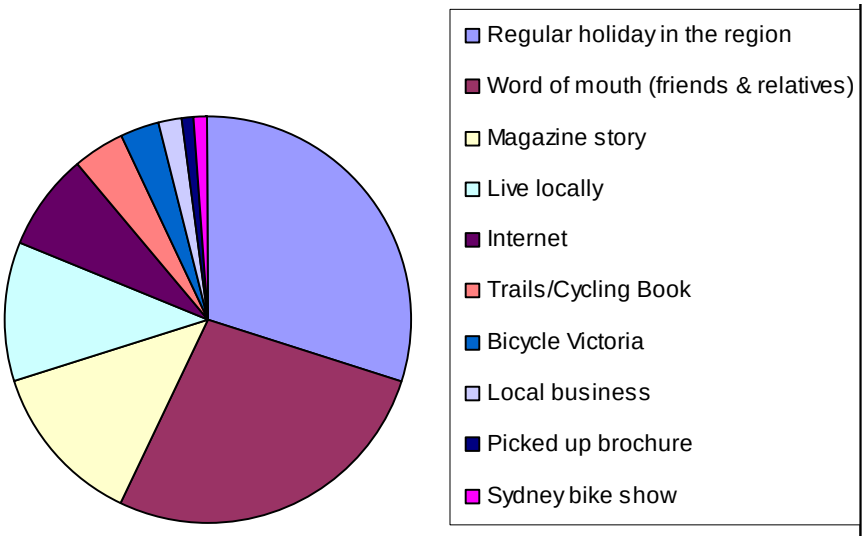
Table 5. Reasons for Choosing to Visit North East Victoria

Reason	Percentage
Location & ease of getting there	11
Range of accommodation	6
Variety of activities	13
All of the above	40
Other	29

The ‘other’ reasons for visiting the region were predominantly to visit friends and relatives and the existence of the Rail Trail itself, which is important but not surprising as those surveyed were using the trail.

Respondents were asked how they found out about the trail. The highest response was that they regularly holiday in the area and so are aware of the trail (30 percent), followed closely by word of mouth (27 percent), as illustrated in Figure 3.

Figure 3. Finding out about the trail



Cycling and Trail Usage

The proportion of time spent cycling varied from half days up to 30 for one group (Table 6). However, the majority spent two to three days traveling, with an average of two days. As the Easter break is generally four days, the opportunity for visitors to cycle for longer periods and/or undertake additional activities is higher than other times of the year.

Table 6. Time Spent Cycling

Length	No.
1 hour	1
½ day	5
1 day	32
2 days	34
3 days	30
4 days	9
5 days	2
6 days	1
7 days	2
10 days	1
30 days	1
Avge = 2 days	

Related to the time that is spent cycling is the distance that people are prepared to cycle on the trail. Table 7 shows the distance that the respondents want to travel during their stay. There was a very strong response to cycling either the entire trail or as much as possible, once again reinforcing the importance of the trail to users.

Table 7. Desired Sections of and Cycling Distance on Trail

Sections of Trail	Percentage	Distance	Percentage
The entire trail	21	5-20 km	12
Only the easy sections	17	20-30 km	15
Those with farm gate sales/food & wine	4	30-80 km	28
As much as we can	58	80+ km	45

Start and finish points for the trail are outlined in Table 8. A total of 51 respondents (36%) completed round trips, returning to the point of origin, which for many was also their accommodation base. The predominance of Wangaratta, Beechworth and Bright for this type of journey may be due to the presence of accommodation, services and access to these towns. No people started or finished in Ovens, but some used it as an overnight stop-over on the trail.

Table 8. Start and Finish Points (number)

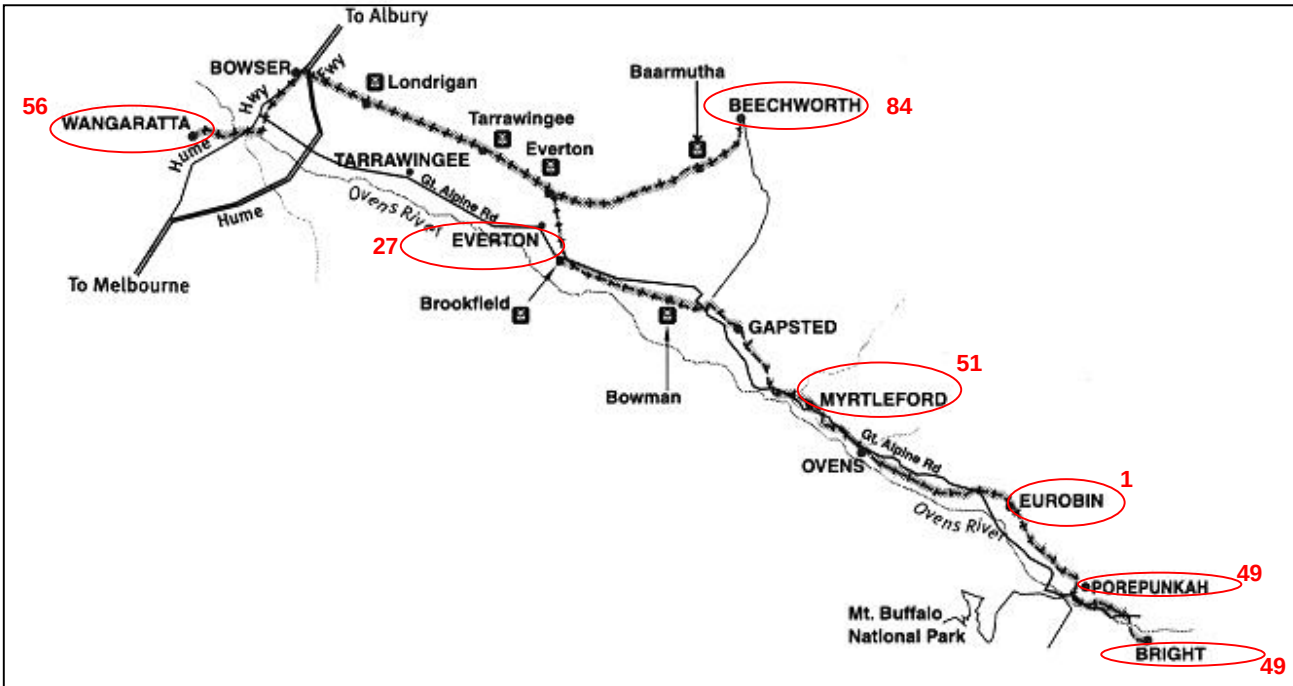
Town	Total	Wangaratta	Beechworth	Everton	Myrtleford	Ovens	Eurobin	Poreppunkah	Bright
Wangaratta	23	7	5	3	3				5
Beechworth	34	9	15	6	1				3
Everton	9	2	2	3	1				1
Myrtleford	14		2		6				6
Ovens	5			1					4
Eurobin									
Porepunkah	19		1	2	1			1	14
Bright	28	1	1	1	3		1	2	19
Off Trail	8								

As the trail passes through the towns listed above, daytime stopovers were primarily in those towns, plus some picnics on the trail (particularly on Good Friday). Specific businesses that were nominated by respondents as stopover points include:

- Bright Berry Farm
- Gapstead Winery
- Boyntons Winery
- Milawa Cheese Factory
- Vine Hotel
- Beechworth Bakery

Apart from Milawa, all are close to, if not directly on, the trail, emphasizing the advantage of proximity to the trail for these businesses. Figure 4 shows the total number of overnight stops along the trail. As noted earlier, the dominance of Wangaratta and Beechworth may reflect the existence of 'cycle friendly' accommodation close to the trail, but can also be due to the range of other attractions/activities in those towns. Beechworth is recognised as a strong historical town and has taken advantage of its status through its promotional activities.

Figure 4. Total Overnight Stops on the Trail for Cycling Groups (number)



Adapted from: http://www.tourisminternet.com.au/bwrail.htm

Table 9 breaks down these figures into each night of the Easter period, peaking on Friday, Saturday and Sunday nights.

Table 9. Overnight Stops for Cycling Groups (number)

Town	Thursday	Friday	Saturday	Sunday	Monday	Total
Wangaratta	11	15	13	14	3	**56**
Beechworth	9	27	27	20	1	**84**
Everton	1	6	6	4	10	**27**
Myrtleford	5	14	14	15	3	**51**
Ovens	0	0	0	0	0	**0**
Eurobin	0	0	0	1	0	**1**
Porepunkah	10	12	12	9	6	**49**
Bright	3	11	14	15	6	**49**
Off Trail: local region	1	8	8	8	6	**31**
Off Trail: other	4	2	5	3	3	**17**
Total	**44**	**95**	**99**	**89**	**38**	**365**

The Experience

Respondents were asked to identify what they found to be the 'best parts' of their experience from a selection of the trail itself, the food and wine, safety, the scenery, the towns along the trail or a combination of them all. Not surprisingly, the highest response was for the combination (42 percent) as presented in Table 10, which supports the general belief that the entire environment of the Rail Trail is appealing.

Table 10. The Best Part of the Experience

	Percentage
The trail	31
Food and wine	4
Safety	3
Scenery	17
Towns along the trail	3
A combination of the above	42

Accommodation

A broad range of accommodation was used, with a strong emphasis on caravan parks and camping (Table 11), along with other self-catering options (house/apartment/cabin). In many ways, this reflects the family orientation of the holiday, where many are on a limited budget. In addition, being in the Australia autumn season, Easter is one of the last opportunities for camping and outdoor activities in Victoria due to the impending winter period. Also, autumn in the North East is stunning with a spectacular range of autumnal colours from non-native trees planted by the early settlers.

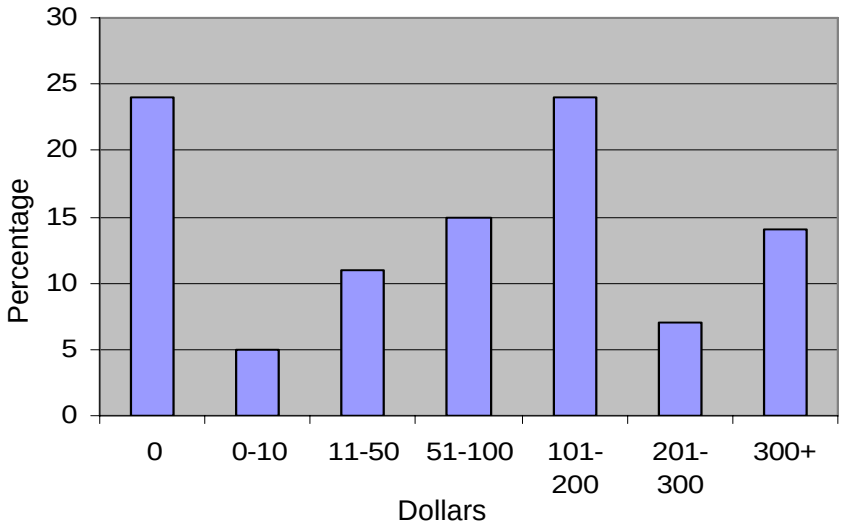
Table 11. Type of Accommodation

	Thursday	Friday	Saturday	Sunday	Monday	Total
Hotel/Motel	14	13	7	7	0	41
B&B/Guest House	3	3	9	4	1	20
Caravan Park	18	26	28	25	13	110
Camping	13	20	22	19	9	83
Backpackers	1	1	2	1	0	5
House/Apartment/Cabin	1	6	8	4	4	23
Own Home	9	9	10	11	6	45
Family/Friends	3	7	8	10	4	32
Other	1	1	2	3	0	7

Economic Input

Expenditure on food and beverages ranged from zero up to $1,000. The range of expenditure for each traveling party on food and beverage is outlined in the graph below. Just under a quarter did not spend on food and beverage, assuming that they brought supplies with them from outside the region. The high level of respondents staying in self-catering accommodation (including camping and caravan parks as well as houses and cabins) as shown in Table 11 above may contribute to this as they may have brought their supplies with them.

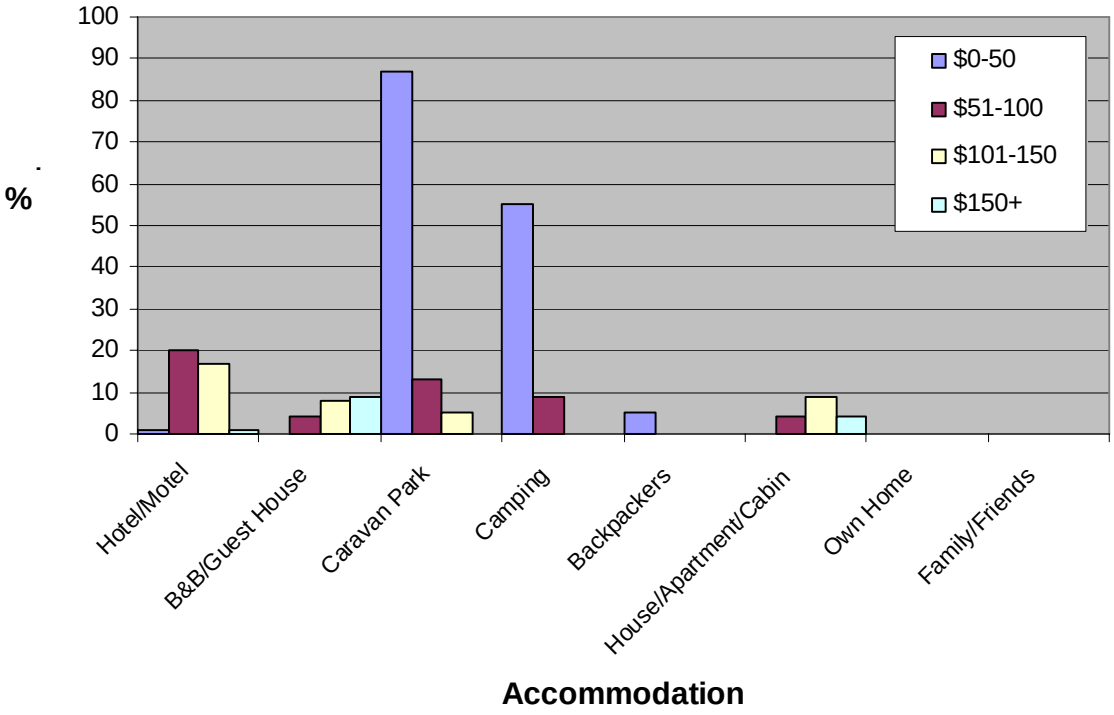
Figure 4. Food and Beverage Expenditure



In addition, 26 respondents spent money on bicycles, with an average expenditure of $54.19, while 72 respondents reported their fuel and transport costs while in the region, averaging $91.28. Taken over the entire sample, this represents 19 and 51 percent of the population respectively.

Accommodation was generally the most consistent cost item, with most parties staying in paid accommodation, as noted previously. Figure 5 outlines the range of expenditure on accommodation.

Figure 5. Overall Accommodation Expenditure



While the reporting was primarily for groups, it has been possible to estimate the average expenditure in the region by these riders, who were spending an average of two days riding on the Trail, as outlined in Table 12. Once averaged out across the entire sample, the transport and cycling costs are lower than those cited earlier.

Table 12. Average Expenditure, per person per day, 2006

	Accommodation	F&B	Trans	Cycling	Other	Total
Average Cost per person per day	27.00	147.00	47.00	10.00	27.00	258.00

However, as noted previously, there are issues of accuracy in terms of self-reporting of expenditure. While a figure per person, per day, is attractive, it is recommended that the range of expenditure per group is a more

reliable figure. That said, the following section continues to use the individual expenditure data in order to provide a comparison with the 2003 survey and present a 'bottom line' figure.

Comparison with 2003 Study

An initial economic analysis of three Victorian Rail Trails undertaken in 2003 found that the Murray to the Mountains Rail Trail contributed significantly to the region, with the direct expenditure of people using the trail summarised below.

Table 13. Average Direct Expenditure per Day, 2003

	Accommodation	F&B	Trans	Cycling	Other	Total
Average Cost per person per day	22.00	60.33	11.77	7.01	11.88	112.99
	27.00	147.00	47.00	10.00	27.00	258.00

Of particular interest to the region is understanding the level of the economic contribution in terms of the multiplier effect, where the money spent in the region 'trickles down' throughout the community. Acknowledging that multipliers are not the same for every region or sector, the Centre for Sustainable Regional Communities at La Trobe University developed a series of regional multipliers that can be applied to the Rail Trail. These have been done by local government area and sector. The relevant multipliers for the Murray to Mountains Rail Trail are:

Table 14. Regional Multipliers

	Wangaratta Shire (Murray to Mountains Rail Trail)
Retail Trade	2.00
Accommodation, Cafes & Restaurants	1.81
Cultural & Recreational Services	1.77

Source: CSRC REMPLAN©

When these Regional Multipliers were included, the contribution to various sectors for 2003 and 2006 can be seen, as in Table 15.

Table 15. Total Economic Contribution per person, 2003 and 2006

Average contribution per person per day		Accommodation	F&B	Trans	Cycling	Other	Total
	2003	31.72	109.20	23.31	14.02	23.76	202.74
	2006	48.87	266.07	94.00	20.00	54.00	482.94

While some economists argue that the use of multipliers is simplistic and often over-exaggerated, the work of the CSRC Remplan is conservative, and has been prepared for each local government area and sector and tested

in these environments. As such, this provides a more accurate and realistic estimate of multipliers, which can be applied with some confidence (Beeton, 2003b).

Many tourism advisors recommend focusing on smaller numbers of visitors who spend more than the 'mass' tourist, providing a greater dollar yield per person. This makes financial and economic sense, but there can be social costs if an enterprise (or destination) tries to actively discourage low yield visitors. In addition, the so-called 'high yield' market is limited. If everyone is chasing this particular type of visitor, competition will become fierce. However, often destinations consider their high yield tourist to be the one who stays in the more expensive accommodation, assuming that such expenditure will continue in all areas of their trip. This may not be the case and, as can be seen by the figures above, expenditure on accommodation on the MTM Rail Trail is not high in many cases due to the availability and use of camping grounds and caravan parks. However, these same people are spending significant amounts on food and beverages, and should be considered as a relatively high yield marked for this trail and region.

Employment

According to Access Economics, every $99,000 spent by tourists creates one additional job in Victoria (Access Economics, 2005). The 8,300 Easter visitors alone contribute some $2,141,400 ($258.00 x 8,300) direct expenditure to the region. This represents 21.6 equivalent full-time jobs being generated by the Easter visitation.

RECOMMENDATIONS AND CONCLUSION

This study demonstrates that the initial results in 2003 were conservative, as expected, with a significant growth in overall economic contribution from $203.00 in 2003 to $483.00 per person per trip. This growth has occurred in all sectors, but primarily in the Food and Beverage area, which may be due to the increased services now provided to people traveling on the Trail. It should also be noted that Tourism Victoria undertook an intensive Bushfire Recovery Program in 2003-4, which has assisted in producing such positive growth.

It can be assumed that the economic contribution of this rail trail will continue to grow, as long as the trail is adequately maintained, supported and promoted, providing a significant benefit to the region.

However, the study has gone beyond simply considering economic data to look at trail use, places visited, aspects of most interest and so on.

Promotional Opportunities

The results indicate that the businesses adjacent to trails that have leveraged their position are attracting stop-overs, particularly wineries and food outlets. It is significant to note that Gapstead Winery won the Best Tourism Winery Award at the 2006 Victorian Tourism Awards, underlying its commitment to tourism. Nevertheless, further work needs to be done, not only by these businesses, but also by others who are in the proximity of the Trail.

Visitors responded positively to the provision of self-catering accommodation, particularly when traveling with family groups. Further studies focusing on their accommodation needs will yield promotional and business development opportunities in this area.

Other Benefits of Cycle Tourism

The health and wellbeing of cyclists and the local community is a positive benefit of cycle tourism. In addition, the value of interaction with others cannot be under-estimated, particularly in small rural communities. Such interaction can increase the sense of pride in the local community of their assets, including their human assets.

Value of the Results for Other Trails

While it has been stated that it is not possible to directly transfer these results to other, less developed trails, particularly in terms of tourist visitation, the study illustrates potential of cycle tourism to Rail Trails and their

host communities. Each case is different in terms of its economic leakages (and multiplier) infrastructure, access and the availability of other attractions and activities for visitors.

Conclusion

Rail Trails provide outstanding opportunities for tourism and recreation, and can encourage outdoor activities and exercise due to the relatively gentle nature of the gradients and the attractive places many pass through. The also provide economic opportunities for the local host communities as well as the increased pride ‘showing your place’ to visitors creates.

However they require not only funds to be developed, but significant maintenance support. In addition, local businesses and communities need to proactively develop, manage and promote the Trails to their markets. Successful tourism does not simply happen – it must be planned for and managed for the long term.

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