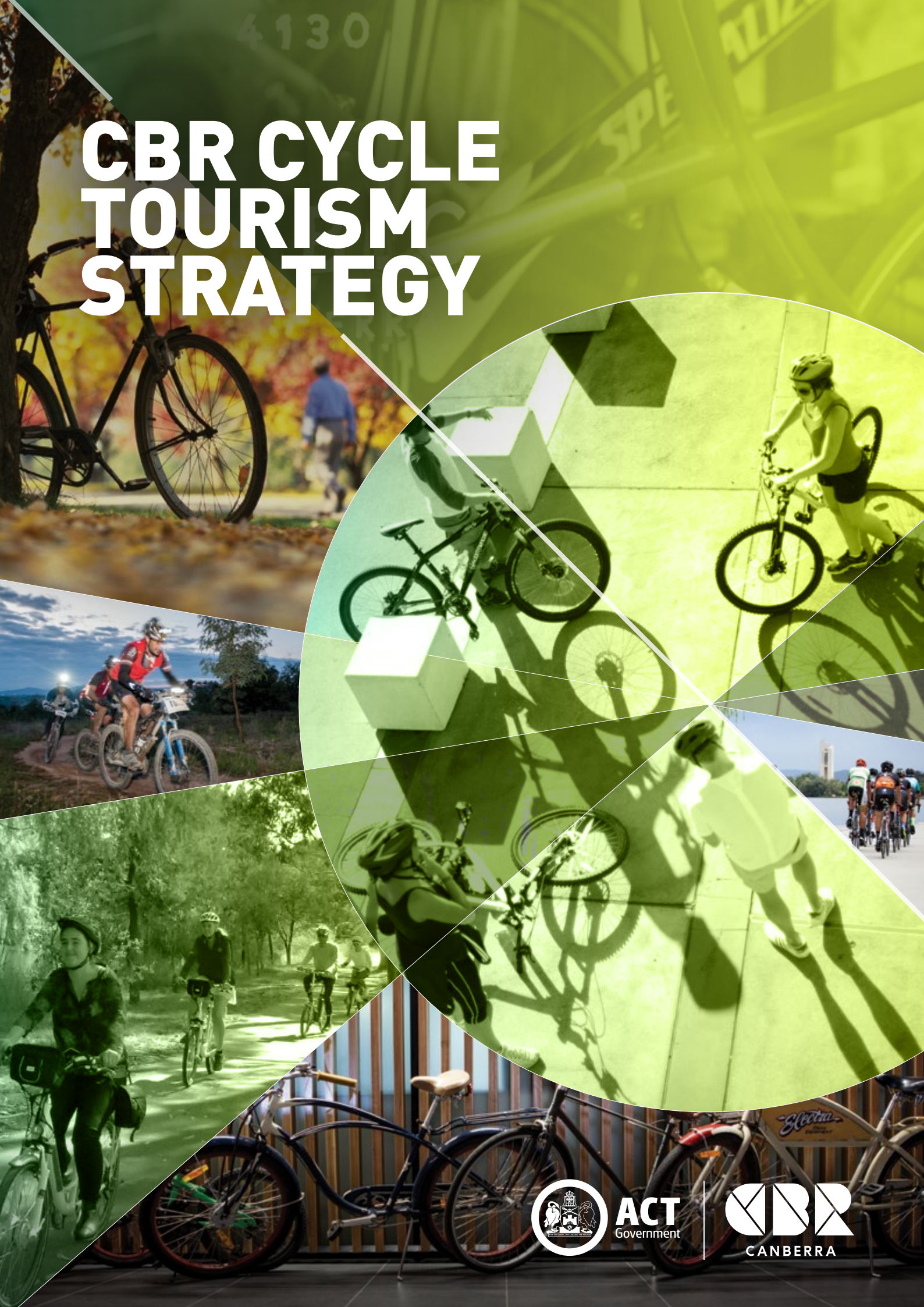


CBR CYCLE TOURISM STRATEGY



ACT
Government





The CBR Cycle Tourism Strategy was prepared for VisitCanberra and the consideration of the ACT Government. It was co-funded through the destination visitor survey program managed by Tourism Research Australia and the ACT Government.

Acknowledgements

We wish to acknowledge the traditional custodians of the land for which the CBR Cycle Tourism Strategy was prepared, the Ngunnawal people. We wish to acknowledge and respect their continuing culture and the contribution they make to the life of this city and this region. We would also like to acknowledge and respect other Aboriginal and Torres Strait Islander people who have been or may in the future be involved in the implementation of the strategy, including the Ngambri people.

For further information about DMS, please visit
www.destinationmarketingstore.com.au

For further information about Arup Australia, please visit
www.arup.com/offices/australia



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INTRODUCTION

Message from the ACT Chief Minister

Globally cycling continues to experience strong growth both as an increasingly popular mode of transport as well as a way to enjoy leisure time and holidays. It appeals to a wide range of people, from the young to the young at heart and the novice to the expert.

In Australia, more than 1.9 million adults cycle with more than 60% of children cycling on a regular basis¹.

The Australian Capital Territory (ACT) and region are well placed to provide high quality cycling experiences and become a cycling destination of choice within Australia.

The ACT's visitor economy goes from strength to strength, with the latest figures showing strong growth in overnight trips and expenditure. It is estimated that if we can increase visitation by just 1.1% a year through cycle tourism, the cumulative economic benefit is likely to exceed \$400 million by 2030.

At the heart of our nation thrives a vibrant place that values sustainability and promotes liveability and well-being.

It embraces its urban culture while celebrating nature and heritage on its doorstep. Canberra and its region offer such exciting diversity, all within close proximity. A place best enjoyed by bike by people from all walks of life and levels of cycling experience.

This strategy outlines how we can work together over the next 10 years to put Canberra firmly on the cycle tourism map and build on our active travel network.



Andrew Barr MLA
ACT Chief Minister
June 2018

THIS STRATEGY
OUTLINES HOW WE
CAN WORK TOGETHER
OVER THE NEXT 10 YEARS
TO PUT CANBERRA
FIRMLY ON THE CYCLE
TOURISM MAP AND
BUILD ON OUR ACTIVE
TRAVEL NETWORK.

1. See: National Cycling Strategy —
www.austroads.com.au/road-operations/bicycles/national-cycling-strategy

About this strategy

This strategy aims to provide a roadmap to assist the ACT Government and key stakeholders, including the private sector, achieve the long-term ambition that Canberra and the region will be recognised as Australia's cycling destination of choice.

The strategy provides insights to enable stakeholders to make informed decisions regarding the optimisation of cycle tourism opportunities. It is intended that the strategy provide a framework that will inform and support an integrated approach to developing, managing and promoting cycle tourism in the Canberra region to interstate and international visitors.

This is a longer term strategy, which identifies and prioritises those projects that have the greatest propensity to grow the visitor economy and the profile of Canberra as a cycle tourism destination. It provides an evidence base on which government and the private sector can make decisions about future investments or consider reshaping existing commitments.

An economic benefit assessment was undertaken as part of the strategy's development to estimate the contribution that cycle tourism would deliver to the ACT's economy. A number of Australian and international case studies of high-profile cycling destinations were also considered.

The *CBR Cycle Tourism Strategy* project has been co-funded through the destination visitor survey program managed by Tourism Research Australia and the ACT Government. It has been informed by rigorous economic analysis and a comprehensive research review.

Extensive stakeholder consultation was undertaken to inform and help shape the strategy. This involved site visits across the ACT and region as well as workshops, small group meetings and teleconferences. Many reports and data sets were also provided by various stakeholders.

The planning and management of the public transport system, including urban cycle ways, will significantly enhance Canberra's point of difference in cycle tourism market. These investments and strategic planning initiatives will also deliver significant benefits to the communities and businesses of the ACT, over and above the economic assessment projections provided as part of the strategy.





AMBITION, GOALS AND STRATEGIC THEMES

Ambition:	To establish Canberra and the region as Australia's cycling destination of choice
Goals:	<ul style="list-style-type: none"> • create a positive and collaborative culture for cycling • strengthen the perception of the ACT and region as Australia's cycling destination of choice • increased visitation to the ACT and the region, contributing to the diversification of the ACT economy • enhance the sustainability and liveability of the ACT and the region for local communities
Strategic themes:	<ul style="list-style-type: none"> • <i>Inclusiveness and accessibility</i> — ensuring the destination is attractive to a wide audience and different target markets • <i>Diversity</i> — delivering cycling options to suit a wide range of experience levels and interests • <i>Proximity</i> — integrating the cycling experience within the broader visitor experience of the ACT and the surrounding region • <i>Marketing</i> — building awareness of the cycling experiences offered by the ACT and the surrounding region

Ambition:
 TO ESTABLISH
 CANBERRA &
 THE REGION AS
 AUSTRALIA'S
 CYCLING
 DESTINATION OF
 CHOICE.



THE MARKET FOR CYCLE TOURISM

Cycling is a highly-segmented market in relation to cycle tourism. There is also strong growth in the commuter market for cycling, which is relevant to the broader cycling culture within Canberra and the region.

For the purpose of this strategy, the key markets have been aggregated into the following three core areas.

- **Leisure** or recreation market, including cycling and non-cycling markets and covering urban cycle ways, nature-based and rail trails and scenic routes among other experiences;
- **Special interest** or niche markets, including mountain biking, BMX and road cycling as well as the range or types of experiences within each of these interest areas – for example, the segmented market for mountain biking, including cross country, technical trails as well as gravity/downhill and 'enduro' trails; and
- **Elite sports** market including the potential for Canberra to become a national hub of cycling excellence.

In addition, there are a range of other events and experiences that provide opportunities for participants and accompanying family and friends to experience what Canberra has to offer.

Size and demand for these markets

It is difficult to accurately size or estimate the future demand for cycle tourism. However, there is a continuing growth of interest in cycling in Australia and globally, which underpin the conservative but robust economic modelling undertaken as part of the strategy development.

The leisure and special interest mountain biking markets are the largest markets that would facilitate earliest and sustainable growth opportunities for the ACT and region.

Figure 1 illustrates the projected net increase in visitation resulting from a more proactive approach to encouraging leisure and special interest cycle tourism opportunities.

A key challenge with regard to cycle tourism and the size of the markets is the lack of existing, consistent data on the number of participants. This is more complex given participation rates by the local community for either leisure or commuting and the role of events. However, the *National Cycling Strategy 2011-2016* recognises that over 1.9 million people now cycle in Australia with 60 % of children cycling regularly².

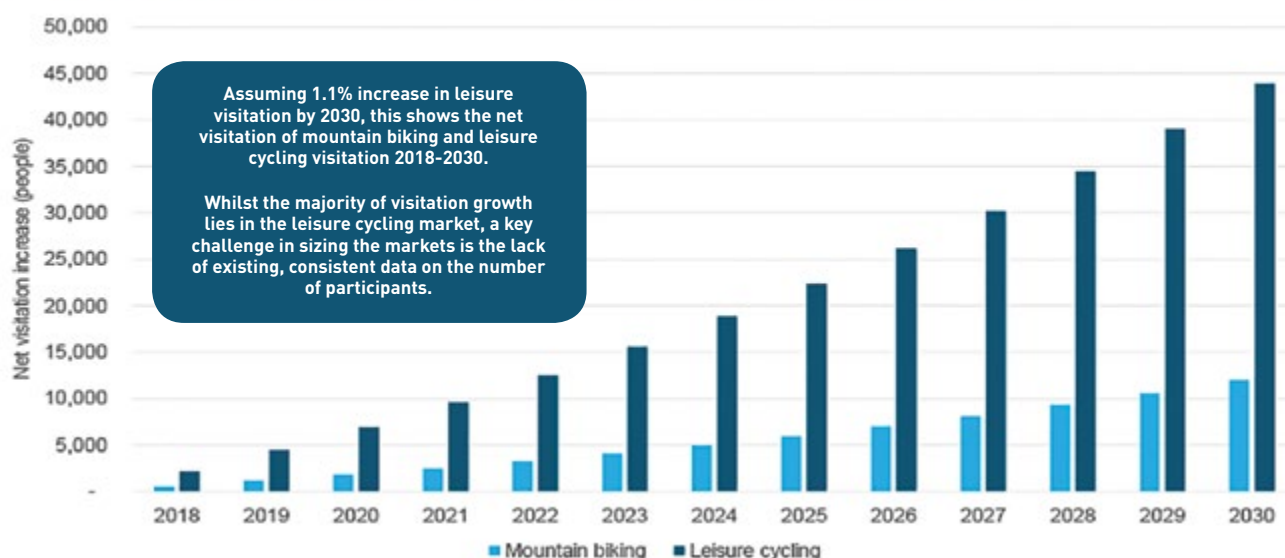
A comprehensive study³ published in December 2016 forecast the compound annual growth rate between 2016 and 2024 of the global bicycle market at around 4 %. Factors such as healthier lifestyles, commitment to environmental sustainability and mobility were key drivers underpinning the projected growth.

However, the report also found that the lack of cycling trails and infrastructure networks for commuter cycling were major impediments to growth. Importantly, the report found that the high participation rate of women is an important driver of growth as is the increasing adoption of e-bikes for 'recreational, commuting and trekking purposes.'

E-bikes have experienced significant technological improvements, which makes them more accessible and enhanced their attractiveness to a broader audience. Asia Pacific is anticipated to be the region that achieves the largest growth while e-bikes will be the leading segment of the market.

Figure 1: potential visitation growth from mountain biking and leisure cycling

Assuming 1.1% increase in leisure visitation by 2030, this shows the net visitation of mountain biking and leisure cycling visitation 2018-2030



2. See: National Cycling Strategy – www.austroads.com.au/road-operations/bicycles/national-cycling-strategy

3. *Global Market Study on Bicycles*, Persistent Market Research, December 2016. See: www.persistencemarketresearch.com/market-research/bicycle-market.asp



CYCLE TOURISM BENEFITS

Australia's domestic visitor economy continues to set new records with the latest figures for 2017 revealing strong growth in overnight trips, nights and expenditure.

In the year ending December 2017, there were 96 million overnight trips (up 7%), 347 million visitor nights (up 6%) and \$63.7 billion in overnight expenditure (up 7%)⁴.

The domestic tourism results highlight the trend for more Australians to holiday or undertake short-breaks in Australia. A significant positive change relates to the purpose for travel being to visit friends and relatives, which has increased by 8%.

Cycling tourism developed for the leisure market would contribute to an increase in the length of stay and spend – importantly, this will contribute to a shift from the perception of Canberra as a short-stay destination to offering longer-duration holidays.

An increase in community cycling events will increase visitor numbers, length of stay and spend. It will be an important contribution to creating a more positive cycling culture within Canberra and the region and will strengthen the attractiveness of events for domestic and international visitors.

Support for attracting a new major events or growing an existing event will generate an increase in revenue to the ACT region.

Creating cycling hubs and connecting infrastructure is critical to increase spend and length of stay as well as provide appeal to the broader visitor market.

Ongoing development of special interest or niche cycling markets, for example mountain biking or road cycling, supports the diversity of offering and would attract more visitors, increase the average length of stay and provide more opportunities for higher-yield markets.

There are also clear benefits for the community and businesses of the ACT region, including but not limited to creating opportunities for new jobs within the visitor economy, preventive health outcomes, and enhanced recreational opportunities and social connectivity, as well as environmental benefits such as reducing car use and contributing towards the ACT's net zero emissions target.

Economic assessment

A high-level economic analysis of the potential market for cycle tourism in the ACT and region recognised that increased cycling visitation supports ACT businesses in the accommodation and retail sectors and helps to contribute to a sustainable active transport culture, among many other benefits.

The economic analysis demonstrates that the greatest opportunity for growing cycle tourism to the ACT economy lies in the leisure cycling market. While it represents a conservative estimate, based on an overall growth of only 1.1% in visitation, the cumulative economic contribution of cycle tourism by 2030 is likely to exceed \$400 million.

Figure 2: potential annual growth in visitation and economic contribution



4. Tourism Research Australia, National Visitor Survey, year ending December 2017.

The key findings of the economic analysis are:



VISITOR DURATION OF STAY

By 2030 visitor stay in the ACT could be extended to participate in recreational and trail cycling. The impact of staying an extra day could be more than \$60 million per year by 2030.



VISITOR SPENDING FOR NEW TRAIL EVENTS

An extra two community cycling events could generate around \$2 million per year by 2030 based on current event participation numbers.



INCREASED ACT GDP FROM NEW JOBS

Job impacts of a cycling culture in the ACT could range from jobs in retail and accommodation in the order of around \$3.6 million per year by 2030.



MAJOR EVENTS

A major cycling event such as the National Road Championships with 1000 competitors and 5000 spectators can generate \$9.1 million in expenditure.

The economic analysis also looked at a range of other locations known for their cycle tourism:

- A detailed 2015 evaluation of New Zealand's Cycling Trails program⁵ found that it delivered a **1:3.55 cost to benefit ratio**, generating \$37.4 million in economic benefits. This demonstrates the significant opportunity cycle tourism presents to economic development. However, it has taken time for the reputation of the destination to build and to realise these significant economic returns on the initial investment. Additional benefits include a wide range of social and environmental outcomes achieved, estimated to be worth \$12 million in 2016.
- The Adelaide Down Under example from South Australia demonstrates that there is economic value and return on investment (ROI) in developing an annual major event as opposed to only considering attracting one off major events (noting that one off major events can also contribute significantly to raising the profile of the destination).

5. See: www.nzta.govt.nz/walking-cycling-and-public-transport/cycling/benefits-of-investing-in-cycling/



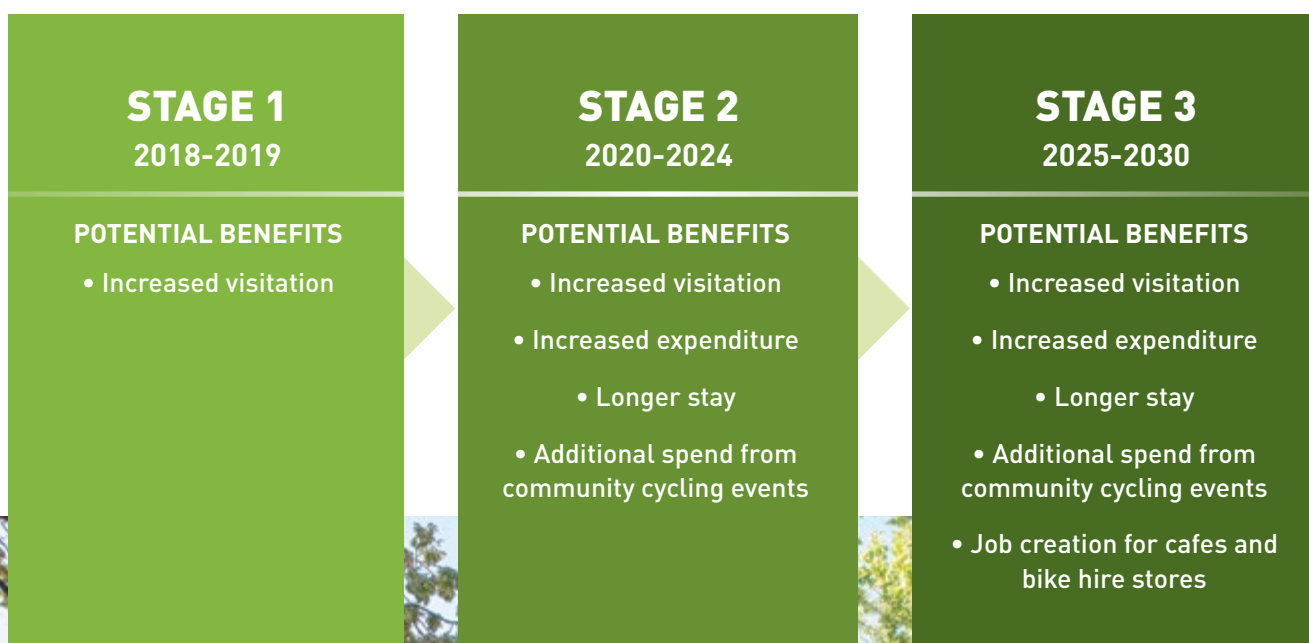
Realising the benefits

The strategy adopts a long-term perspective, with implementation staged over the next decade or so. There are **three stages for realising the potential benefits of cycle tourism** which have been linked to the strategy's action plan (figure 3 below).

The staging of the implementation of the strategy aims to leverage the existing strengths of the ACT in the region, consumer insights and relevant trends in cycle tourism to:

- address both supply and demand forces relating to cycle tourism
- identify opportunities to enhance the perception of the destination has bike friendly; and
- attract more people and accelerate the contribution of cycle tourism to the ACT's economy.

Figure 3: the three stages in the strategy action plan



THE OPPORTUNITY FOR THE ACT AND SURROUNDING REGION

There are few other destinations in Australia that are able to offer the range of cycling opportunities or visitor experiences that the ACT and region provide within easy access. As a result, this point of difference underpins the strategy's positioning framework.

The positioning framework aims to find the emotional territory that provides a point of difference from competitor destinations and helps to achieve greater cut-through in a highly-competitive market place. In addition to the insights that contributed to shaping the Ambition, including sustainability, liveability and well-being, it is based on the following key concepts:

- **Diversity and proximity** – reflecting the destination's unique positioning:
 - Diversity of cycling options from urban cycle ways and road cycling through to off-road cycling and bike parks, touring and scenic routes and special interest trails; and
 - Proximity to national attractions, arts and culture, events, food and beverage and nature – reinforcing VisitCanberra's Experience Pillars⁶ and providing a uniquely Australian experience.
- **Accessibility** – including ease of access as well as enabling access for disabled or older visitors;
- **Connectivity** – between cycling opportunities as well as to nature and Aboriginal culture, including opportunities for viewing iconic Australian wildlife and visiting Aboriginal cultural sites of significance; and
- **Broader regional context** – including rail trails and touring routes.

The positioning framework is:

At the heart of our nation thrives a vibrant place that values sustainability and promotes liveability and well being. It embraces its urban culture while celebrating nature and heritage on its doorstep. Canberra and its region offer such exciting diversity, all so close to each other. A place best enjoyed by bike by all generations, from the young to young at heart.

This positioning provides a broad framework that is:

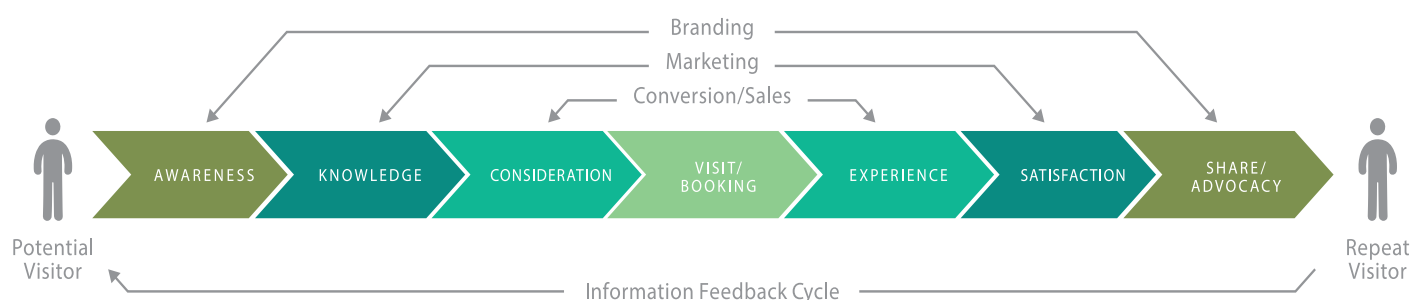
- Aspirational;
- Invitational;
- Based on consumer insights and resonates with the target markets; and
- Leverages the unique destination positioning.

It provides the context and an emotional reason to choose your destination over any other.

The strategy and its action plan has been designed around the key elements of the 'customer journey' (Figure 4) and the influence they play in building awareness of the destination through to conversion of interest to an actual visit and ultimately advocacy for the destination.

6. VisitCanberra's Experience Pillars are: Outdoors and Nature; Family Fun; Art and Culture; and Food and Wine.

Figure 4: the customer journey





FRAMEWORK AND STRATEGIES

Guiding principles

The strategy has adopted five guiding principles to ensure it is relevant, robust and implementable. These principles are:

- **Inclusive** – the strategy aims to create a cycling destination that has broad appeal and a diverse range of cycling options for people of different capacities and interests
- **Sustainable** – the priorities and actions identified within the strategy need to be financially, socially and environmentally sustainable to enable the achievement of the ambition in the longer term
- **Collaborative** – the success of the strategy relies on the public and private sectors working together. Cooperation between the sectors will also contribute to building a more positive culture for cycling within Canberra and the region
- **Best practice** – ensuring any activities, including the development of infrastructure, undertaken within the strategy stands the test of time and provides a consistent and high quality experience to increase the appeal of the destination
- **Customer focused** – planning and management adopts a customer focus, whether it is for the local community or visitors to the ACT in the region. Understanding visitor or customer journey as well as the motivations, expectations and barriers to travel will underpin the implementation of the strategy and the design of any initiatives.

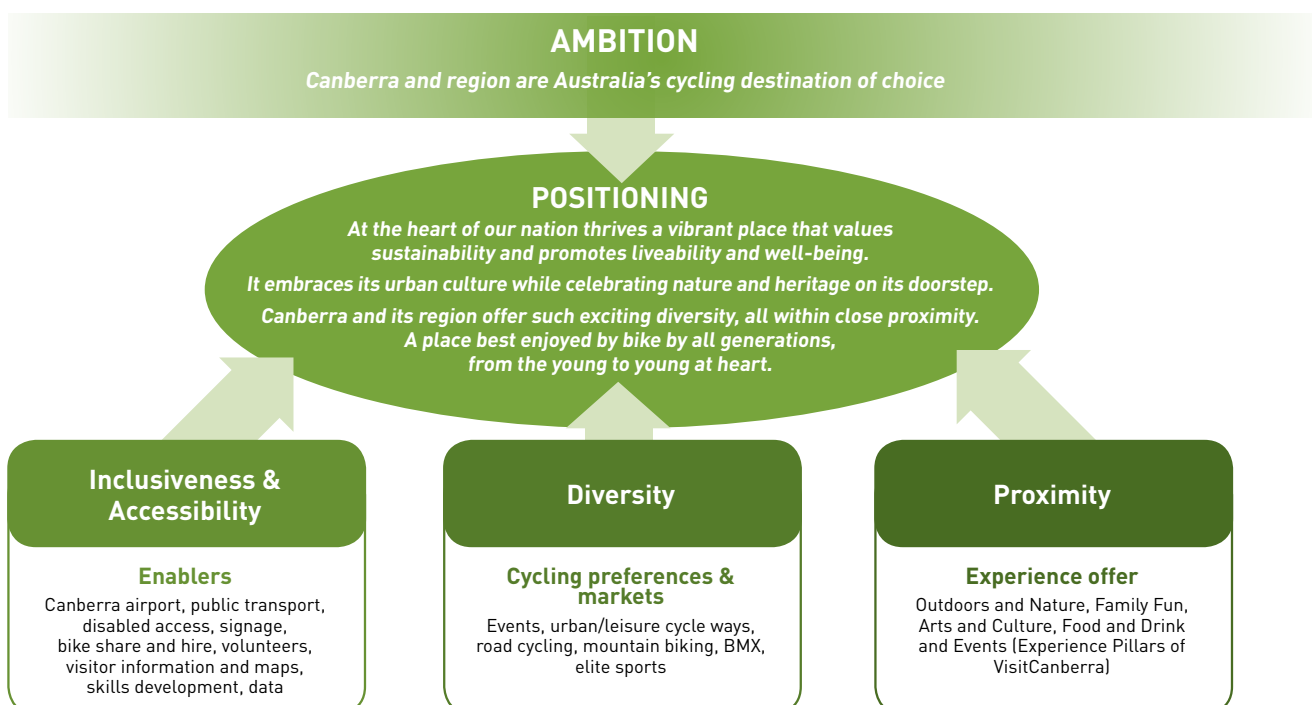
Experience framework

The Experience Framework (Figure 5) is based on three core propositions:

- I. **Inclusiveness and accessibility** which are essentially the enablers that ensure the destination is attractive to a wide audience and different target markets;
- II. **Diversity** which focuses on cycling preferences and markets. It recognises that there are cycling options to suit a wide range of experience levels, from novice to elite sport, or interests, from leisure through to events and special interest cycling markets; and
- III. **Proximity** which connects the broader experiences offered by the ACT and region to cycling opportunities.

An important consideration is that the *CBR Cycle Tourism Strategy* is not just about cycling as a mode of transport linking experiences together. It is about how the cycling experience is integrated with the broader experience offer of Canberra and the region. This distinction means that cycling becomes a cross-cutting theme and influences the way that marketing and promotion of the region reinforces seeing and experiencing Canberra and the region by bike as a core proposition.

Figure 5: Experience Framework



Enablers

Core Proposition	Key Enablers
<p>Inclusiveness and accessibility</p> <p>Inclusiveness and accessibility are essentially the enablers that ensure the destination is attractive to a wide audience and different target markets.</p>	<ul style="list-style-type: none"> • Public transport and access gateways, including transport planning • Disabled access and infrastructure • 'Along the way' and 'end of trip' facilities • Visitor information, including itineraries, maps and navigational signage • Bike share and bike hire • Bike Stop program and expansion • Safety and skills development programs • Community involvement and engagement • Governance framework that involves the public and private sectors as well as strengthening inter-government cooperation • Sustainability guidelines for trail design, construction and maintenance • Data gathering and analysis to inform key decisions, including for trail and experience development
<p>Diversity — Cycling preferences and markets</p> <p>In order for the ACT and region to achieve its Ambition of becoming a cycling destination of choice, it is necessary to deliver cycling options to suit a wide range of experience levels, from novice to elite sport, or interests, from leisure through to events and special interest cycling markets (i.e. mountain biking, BMX and road cycling).</p>	<ul style="list-style-type: none"> • Analysis of the experience offer in relation to the aggregated markets, including identification of signature experiences and potential new trails that would appeal to the cycling target markets. • Prioritisation of programs and activities based on: <ul style="list-style-type: none"> - Competitive advantage and emerging or significant trends in the visitor economy - Opportunities to leverage existing infrastructure and assets - Potential for economic contribution - Timing based on the greatest opportunity to increase participation rates • Attracting and supporting major events as well as community-based events to enhance the appeal and perception of Canberra as bike-friendly • Robust and credible approach to experience development, including detailed business planning, and feasibility assessment on a case-by-case basis • Development of a detailed implementation plan to support sustainable planning and management of a quality trails network • Ongoing development and management of the cycling experience offer, including upgrades and completion of links in the cycle way network
<p>Proximity — Delivering on Canberra's Experience Pillars</p> <p>The region offers unparalleled access to Australia's national institutions, quality food and wine, arts and culture and the great outdoors. A clear competitive advantage for the ACT and region is the ability to connect its broader experience offer through cycling opportunities and reinforcing how to see and experience Canberra by bike.</p>	<ul style="list-style-type: none"> • Involvement of key institutions and attractions to support experience development and improve infrastructure and facilities e.g. Bike Stop program • Involvement of the business sector is critical, including the accommodation and hospitality sector • Promoting the opportunities to cycle between accommodation properties, hospitality hubs, dining precincts and event venues or exhibitions as part of the broader experience offer of Canberra. This would strongly appeal to the leisure and short break markets • Integration of cycling as part of the core experience offering of the ACT and region



MARKETING AND VISITOR SERVICES

Cycling is a core experience proposition that would differentiate the Canberra experience from other Australian urban destinations. However, in the context of the unique destination positioning of diversity and proximity, it does mean these experiences and the ACT are positioned as more accessible than other destinations.

Raising the profile of cycling and demonstrating how the other experiences pillars may be accessed or experienced by bike, would underpin the unique destination positioning. In marketing terms, cycling can 'ground truth' and provide evidence that the promise of the destination is believable and achievable.

As a result, the **development of a five-year marketing plan for cycle tourism** in the ACT and region is required. It would incorporate tactical initiatives and enable the cycling experience to be integrated with the broader experience offer of Canberra and the region, becoming a cross-cutting theme and reinforcing seeing and experiencing Canberra and the region by bike as a core proposition.

There is a need to be clear and focused on communication with target markets. This relates to all target audiences, whether it is the leisure market with an interest in the broader experience offer or special interest markets that

desire to know more about the diversity and quality of the cycling experiences they will find in your destination. In essence, efforts should be directed to providing the right content for the right market through the right channels.

Marketing the ACT and region as a cycling destination will also be enhanced through collaboration, for example cooperative (co-op) marketing campaigns that involve national institutions, attractions, accommodation and access gateways like Canberra airport. The current co-op destination marketing campaigns could be expanded to enhance the promotion of the ACT and region as a cycling destination of choice to both domestic and international markets.

In addition, there is significant opportunity to improve visitor information and services, which would contribute to the perception of the ACT and region as bike-friendly as well as encouraging higher conversion of interest during the booking process.

A key initiative in the early stages of implementation of the strategy, will be to create and curate content that profiles the existing cycling experience offer for both domestic and international markets. Content could incorporate cycle trails, tours and itineraries; activities such as 'learn to ride' programs; downloadable maps; cycle events; and opportunities for promoting the broader visitor offerings of the ACT. Content would be accessible online (i.e. via a dedicated section on visitcanberra.com.au) and used as the 'call to action' on all cycle tourism marketing activities.

DEMONSTRATING
HOW THE EXPERIENCE
PILLARS MAY BE
ACCESSED OR
EXPERIENCED BY BIKE
WOULD UNDERPIN THE
UNIQUE DESTINATION
POSITIONING.



IMPLEMENTATION AND ACTION PLAN

An *action plan* has been developed to implement the strategy focusing on the enabling actions, marketing tactics and activities required in the immediate, medium and longer term. The action plan covers a range of functions including marketing, visitor services, experience development, industry development, planning, policy and infrastructure. The action plan will be regularly reviewed and updated to ensure its currency and relevancy.

Ongoing stakeholder consultation will be critical to the success of the implementation of the strategy. It is essential that the planning for the development of new experiences or implementation of other initiatives involve effective and

appropriate consultation with key stakeholders, including Traditional Owners, specifically the United Ngunnawal Elders Council within the ACT or the relevant Local Aboriginal Land Council in surrounding areas within NSW.

A good governance model that includes leadership, shared ownership, specialists support for marketing, data gathering and evaluation will be an important feature of the implementation of the strategy. Finding models that promote strong collaboration within government and between the public and private sectors will be a key focus of the early stages of implementation.





ACTION PLAN

The action plan has been developed to guide the implementation of key recommendations identified through the strategy and in consideration of the following information, outlined below as the 'key to table.'

Key to table:

Priority: Allocates a timeframe to commence (but not necessarily complete) the action:

- H** High priority based on availability of resources — within the next 12 to 24 months
- M** Medium priority based on availability of resources — within 2 to 3 years
- L** Lower-order priority based on availability of resources — 3 to 5+ years
- O** Ongoing action — initiative commenced and to be continued

Category: Describes the primary and potentially secondary function the action would achieve or require:

- **Marketing** — this relates to positioning and marketing actions
- **Visitor Services** — this includes all customer channels for information and promotion of cycle tourism across the region
- **Experience Development** — this relates to all opportunities to revitalise existing or create new visitor experiences
- **Industry** — this includes capacity building, industry networks and partnerships as well as research and data analysis
- **Planning** — this includes strategic land-use planning, feasibility assessments and master planning
- **Policy** — this relates to ACT Government policy settings
- **Infrastructure** — relates to both the strategic planning for and ongoing maintenance of key cycling infrastructure, including transport and supporting facilities.



Outcome timeframe: Links directly to the strategy's economic analysis and reflects the estimated timing to achieve the outcome that would result from the specific action.

- **Stage 1: Immediate** (2018-19) — the project outcome will be a direct result of the action
- **Stage 2: Medium-term** (2020-24) — the action will result in the project outcome over the medium term. However, other actions or resources may also be required to achieve the outcome
- **Stage 3: Longer-term** (2025-30) — the action is the first step towards the project outcome. However, other actions or resources will be required to achieve the outcome.

Goal: Identifies the strategy's goal to which the action will contribute. These are:

- A** Create a positive and collaborative culture for cycling;
- B** Strengthen the perception and build awareness of the ACT and region as Australia's cycling destination of choice;
- C** Increase visitation to the ACT and region and contribute to the ACT's visitor economy; and
- D** Enhance the sustainability and liveability of the ACT and region for local communities.

The action plan involves three tables:

1. ACTION PLAN

This is the main table, which includes references to Tables 2 and 3

2. ENABLING ACTIONS

This table outlines specific actions relating to enabling activities

3. MARKETING TACTICS AND ACTIVITIES

This table outlines specific marketing tactics and activities.

THE ACTION PLAN
WILL BE REGULARLY
REVIEWED AND
UPDATED TO ENSURE
ITS CURRENCY AND
RELEVANCY



Table 1: Action plan

1. ENABLERS

Ref	Priority	Action	Category	Outcome timeframe	Lead agency	Goal
1.1	H	Expand the membership and role of the existing Active Travel Advisory Group chaired by the Active Travel Office within Transport Canberra and City Services (TCCS) to enable effective coordination, facilitation and delivery of actions	Policy & Planning	Stage 1	Active Travel Office (TCCS)	A & D
1.2	H	Review the membership of the existing Active Travel Advisory Group to ensure appropriate representation from peak cycling groups, industry and community	Industry, Policy & Planning	Stage 1	Active Travel Office (TCCS)	A & D
1.3	H	Investigate the feasibility of establishing a Cycle Trails Manager and Unit within the Environment, Planning and Sustainable Development Directorate (EPSDD) to enable a more coordinated approach to cycling across the ACT and region	Policy, Planning, Industry & Infrastructure	Stage 1	ACT Parks and Conservation Service (EPSDD)	A, C & D

The following enabling actions link to Action 1.3, forming the basis of the ongoing work program of the Cycle Trails Manager/Unit

1.4	H	Review, prioritise and stage implementation of key enabling actions identified in Action Plan Table 2	Various	Stage 1 - 3	Active Travel Office	All
1.5	M	Consider opportunities for investment as well as raising revenue or other funding sources to enable the development, management, maintenance and promotion of the trail network (urban and regional) and delivering on supply	Industry, Policy, Planning & Infrastructure	Stage 1 - 2	Active Travel Office, ACT Parks and Conservation Service	C & D
1.6	O	Develop a <i>Community Involvement Strategy</i> or policy to encourage and support community participation in cycling	Policy & Planning	Stage 1	Active Travel Office	A & D
1.7	M	Develop guidelines for sustainable cycling trail design, construction and maintenance	Policy, Planning & Infrastructure	Stage 1	Active Travel Office, ACT Parks and Conservation Service	A & D
1.8	M	Identify opportunities to undertake more detailed research and data analysis	Industry	Stage 2	Active Travel Office, VisitCanberra (CMTEDD)	A & C

2. DELIVERING ON SUPPLY

Ref	Priority	Action	Category	Outcome timeframe	Lead agency	Goal
2.1	H – O	Leverage implementation of the Stromlo Forest Park Master Plan and proposed upgrades to the urban cycleway network to support delivery of a whole of Government Hub & Spoke model, specifically Stromlo Forest Park and Urban Precincts as two primary hubs which are connected via the urban cycle way 'spokes' — links to Actions 2.3 and 2.6	Experience Development	Stage 2	Venues Canberra (CMTEDD), Active Travel Office	All
2.2	H – O	Investigate opportunities to leverage and expand the existing Women on Bikes program (<i>Ride Sally Ride</i>) in a way that appeals to the leisure and special interest markets and provides a clear point of difference for the ACT	Experience Development & Marketing	Stage 2	Active Travel Office, Events ACT	A, B & C
2.3	M – H	Coordinate a national attractions trail (i.e. Canberra's Diamond) that leverages the Parliamentary Triangle and enabling actions (Table 2)	Experience Development	Stage 2	Active Travel Office, VisitCanberra	B & C
2.4	M	Investigate the feasibility of creating a 'themed cycling experience' to enhance the key trails for road cycling and mountain biking along the Molonglo Corridor – links to Action 2.7	Experience Development	Stage 2 - 3	Active Travel Office, ACT Parks and Conservation Service	All
2.5	H	Host product development workshops and bike-friendly seminars to build industry capacity and create new cycling offers	Industry, Marketing & Experience Development	Stage 1 - 2	Active Travel Office, VisitCanberra	B & C
2.6	H – O	Review and commence staged implementation of the Stromlo Forest Park Master Plan, including reinforcing its core offer of mountain biking and creating a key hub with revenue opportunities	Experience Development & Planning	Stage 2 - 3	Venues Canberra	A, C & D



2. DELIVERING ON SUPPLY *continued*

Ref	Priority	Action	Category	Outcome timeframe	Lead agency	Goal
2.7	H – O	Identify and prioritise the development of new trails or enhancements to the existing trail network (urban cycle ways and mountain bike trails) — links to Action 1.1	Planning, Infrastructure & Experience Development	Stage 2 - 3	Active Travel Office, ACT Parks and Conservation Service	A, C & D
2.8	M – L	Showcase opportunities and enhanced promotion of BMX events and skills development	Marketing & Visitor Services	Stage 2	Active Canberra (CMTEDD)	A, B & C
2.9	H	Enhance promotion of road cycling events and road riding routes	Marketing & Visitor Services	Stage 1 - 2	VisitCanberra	A, B & C
2.10	H	Promote opportunities for investment by the private sector in facilities, including profiling successful case studies from the global cycling market — links to Action 1.5	Industry, Planning & Experience Development	Stage 2 - 3	ACT Parks and Conservation Service	A, B & C
2.11	M	Identify opportunities to attract and support road and mountain bike cycling events in line with the <i>2025 Major Events Strategy for the ACT</i>	Marketing, Experience Development & Industry	Stage 2	Events ACT (CMTEDD), VisitCanberra	A, B & C
2.12	L	Investigate the potential to create a national cycling hub of excellence in the ACT and region	Industry, Planning & Infrastructure	Stage 3	Active Canberra, AIS	A & B
2.13	H	Coordinate Government resources to more effectively support market entry of small businesses and development of new experiences from concept stage through to attracting investment and implementation	Industry, Planning & Infrastructure	Stage 1	VisitCanberra	All



3. GROWING DEMAND

Ref	Priority	Action	Category	Outcome timeframe	Lead agency	Goal
3.1	H	Integrate cycling as part of the core experience offering of the ACT and region, including creation/curation of content that profiles the existing cycling experience offer – see <i>High Priority Initiative</i> in Table 3 below	Marketing & Visitor Services	Stage 1	VisitCanberra	A, B & C
3.2	H	Develop a five-year Marketing Plan for Cycle Tourism in the ACT and region that considers the marketing tactics and actions identified in Action Plan 3	Marketing	Stage 1	VisitCanberra	B & C
3.3	H	Investigate opportunities to undertake a baseline review and evaluation of current perception, awareness and visitation by markets interested in cycling	Marketing	Stage 1	VisitCanberra	B & C
3.4	M	Review the customer journey to identify opportunities and gaps regarding conversion of interest to purchase and advocacy, including to enhance the customer experience in digital and online environment	Visitor Services & Marketing	Stage 1 - 2	VisitCanberra	B
3.5	H	Enhance the information available through the Canberra and Region Visitors Centre	Visitor Services	Stage 1	VisitCanberra	B & C



Table 2: Enabling actions

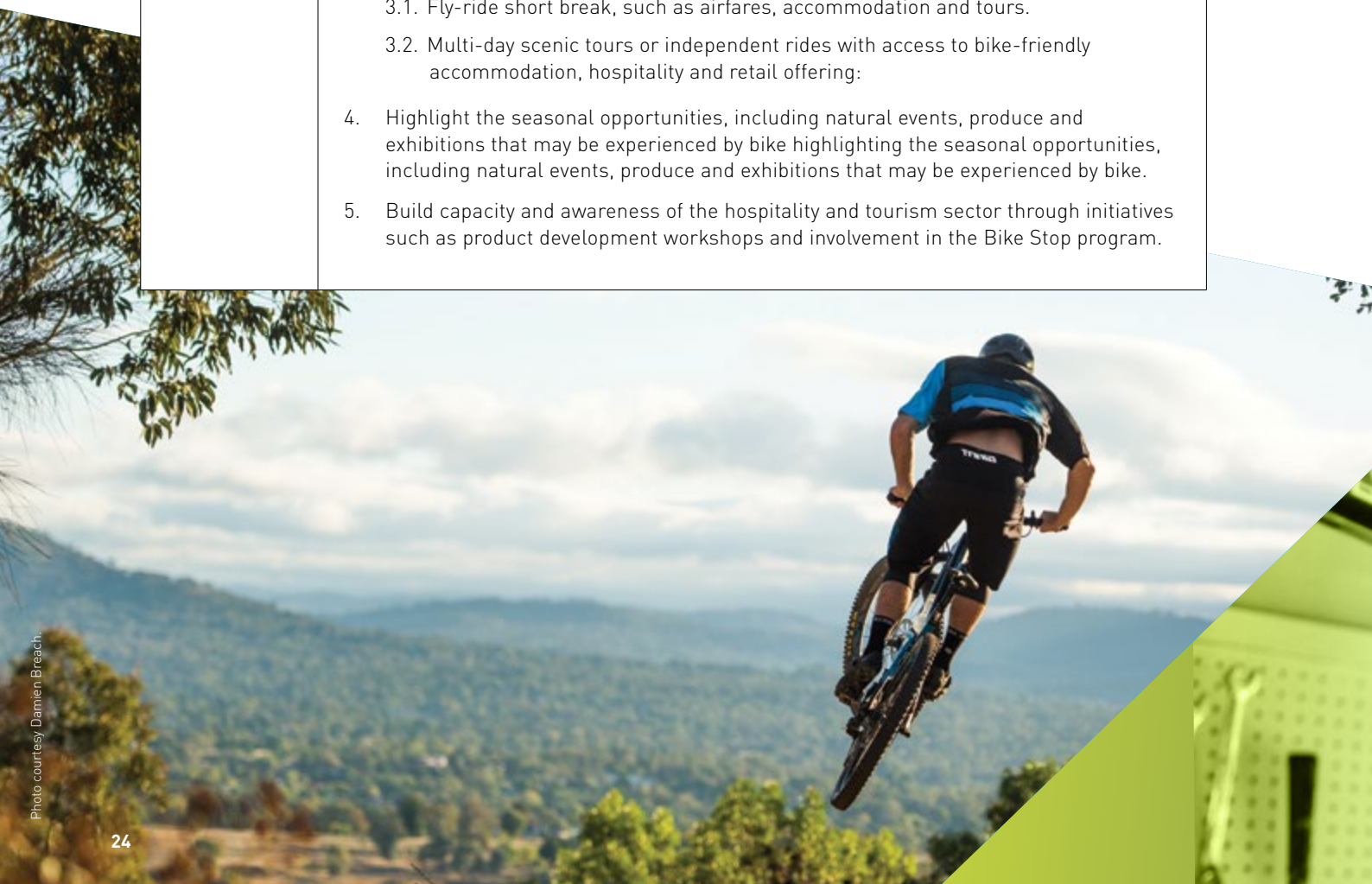
Enablers	Key actions
Public transport and access gateways	<ol style="list-style-type: none"> 1. Identify best methods and facilities required to support cycling, such as bike transportation between key hubs, bike parking and recharging stations for e-bikes. 2. Investigate the feasibility of providing and promoting bike hire and cycling facilities at Canberra Airport to enable fly-ride packages, especially for the short break market.
Disabled access and infrastructure	<ol style="list-style-type: none"> 1. Identify opportunities to enhance and promote the urban cycle way to more proactively encourage disabled access to cycling. This could include providing supporting infrastructure and facilities that enable people with disabilities to cycle between key sights and institution.
<p>'Along the way' and 'end of trip' facilities, including:</p> <ul style="list-style-type: none"> • Bike Stop initiative • Involvement of national institutions and attractions <p>See also Action 2.3</p>	<ol style="list-style-type: none"> 1. Investigate opportunities to expand the Active Travel Office's Bike Stop initiative across the ACT and region, including in surrounding local government areas such as Queanbeyan-Palerang Regional Council (QPRC), wineries and galleries, etc. 2. Encourage national institutions and attractions to develop bike-friendly facilities, including bike storage, tyre pumps and recharge facilities for e-bikes as well as services such as change rooms and lockers for helmets or providing use of wheel chairs for cyclists with a disability. 3. Integrate the national institutions and attractions in the Bike Stop program as a priority. 4. Extend the Bike Stop program to include bike-friendly accommodation and hospitality service providers.
<p>Visitor information and signage, including maps</p> <p>See also Action 3.5</p>	<ol style="list-style-type: none"> 1. Consider ways to improve information, maps and signage, which are critical to encourage increased cycling participation rates within the community as well as lifting the perception of Canberra and the region as a bike-friendly destination. This is a high priority and should be developed with insights resulting from Action 3.5. 2. Develop an agreed system and design for trail signage as a high priority. This would need to involve collaboration between land managers, including the National Capital Authority (NCA) and QPRC. 3. Consider integration of Google map trail identifiers in online mapping to enable visitors to plot the trail they want to do matched to their preferred experiences.
Bike share and bike hire	<ol style="list-style-type: none"> 1. Enable the strategic implementation of bike share by the Active Travel Office and bike hire businesses, based on identified objectives and clear criteria that match the needs of the ACT and region (both for visitors and communities). 2. Identify and implement facilities to support bike share and bike hire, such as bike parking, tyre pumps and recharging stations for e-bikes.

Enablers	Key actions
Skills development programs	<ol style="list-style-type: none"> 1. Promote skills development and learn to ride programs as part of the broader cycling experience offer. 2. Continue to support leadership and cycle guide training and accreditation programs, in particular for mountain bike ride leaders.
Inter-agency and inter-government cooperation	<ol style="list-style-type: none"> 1. Actively encourage greater collaboration between ACT directorates and with the NSW Government to integrate cycling infrastructure and facilities as part of major public infrastructure projects.
Community involvement and engagement	<ol style="list-style-type: none"> 1. Develop a Community Involvement Strategy – links to Action 1.6.
Data gathering and analysis	<ol style="list-style-type: none"> 1. Consider Implementing the objective of the <i>National Cycling Strategy 2011 – 2016</i> (NCS) relating to monitoring and evaluation, including gathering better data on participation rates and seeking insights into the motivation for and barriers to cycling in the ACT and region. <ol style="list-style-type: none"> 1.1. There are a number of key areas for further research or more detailed data collection and analysis that would assist the ACT Government in planning for and promoting the ACT and region as a cycling destination of choice 2. Expand the Active Travel Office's 'bike barometer' initiative to other locations and support data gathering through programs such as Pedal Power ACT's <i>Town-Centre Cordon Counts</i>.
Event planning and support	<ol style="list-style-type: none"> 1. In line with the <i>2025 Major Event Strategy for the ACT</i>, investigate opportunities to reduce 'red tape' and costs relating to hosting and delivering events (event regulation). <ol style="list-style-type: none"> 1.1. Promote to industry and peak cycling groups initiatives already introduced by the Justice and Community Safety Directorate (JACS). 2. Provide ways to improve event management i.e. planning for road closures and other essential services.
Cyclist safety	<ol style="list-style-type: none"> 1. Integrate key messages relating to cyclist safety and promote a positive cycling culture by leveraging the JACS Share the Road campaign.



Table 3: Marketing tactics and activities

Aggregate market	Key actions
<p>High priority initiative: Enhanced promotion of the existing cycling opportunities in Canberra and the ACT</p>	<ol style="list-style-type: none"> 1. As a high priority initiative in the early stages of implementation of the strategy, create and curate content that profiles the existing cycling experience offer for both domestic and international markets. Content could incorporate cycle trails, tours and itineraries, activities such as 'learn to ride' programs, downloadable maps, cycle events and opportunities for cross promoting the destination's other points of interest. Content would be accessible online (i.e. on the VisitCanberra website) and used as the 'call to action' for all cycle tourism marketing activities.
<p>Leisure market</p>	<ol style="list-style-type: none"> 1. Position/promote key precincts and cycling hubs to demonstrate the personality of these places and how they can be accessed by bike (including online mapping). 2. Undertake PR activity including the use of influencers, particularly targeting women in the leisure market as well as traditional media channels. 3. Promote packages (including through co-op marketing activities) that bundle elements that would deliver on: <ol style="list-style-type: none"> 3.1. Fly-ride short break, such as airfares, accommodation and tours. 3.2. Multi-day scenic tours or independent rides with access to bike-friendly accommodation, hospitality and retail offering: 4. Highlight the seasonal opportunities, including natural events, produce and exhibitions that may be experienced by bike highlighting the seasonal opportunities, including natural events, produce and exhibitions that may be experienced by bike. 5. Build capacity and awareness of the hospitality and tourism sector through initiatives such as product development workshops and involvement in the Bike Stop program.



Aggregate market	Key actions
Special interest and niche markets	<ol style="list-style-type: none"> 1. Create and curate inspirational content accessible to view and share on popular digital platforms for the special interest market, including events and enhancements to the trail network (e.g. featuring both existing trails and new trails). 2. Undertake targeted PR activity utilising influencers (e.g. mountain biking or road cycling bloggers) and local ambassadors (e.g. cycling champions from the ACT) as well as providing content for relevant forums and third-part websites. 3. Initiate co-op marketing activities with key land managers (e.g. ACT Parks and Conservation Service) and institutions such as the National Arboretum Canberra, particularly as they expand or enhance their cycling offer. 4. Promote packages that bundle elements that would support visitation for: <ol style="list-style-type: none"> 4.1. Special interest events. 4.2. Special interest short breaks for groups of friends.
Elite sports market	<ol style="list-style-type: none"> 1. Identify and promote local ambassadors who are cycling champions or elite athletes. 2. Investigate co-op marketing activities with organisations responsible for delivering elite cycling events, including the AIS.
Events	<ol style="list-style-type: none"> 1. Identify opportunities to leverage, expand and promote key cycling events, including potential new events such as a Women and Girls' Cycling Festival – identify one signature community-based event that leverages new or existing initiatives of the ACT Government. 2. Create and curate inspirational content accessible to view and share on popular digital platforms that promote and increase awareness of the ACT and region's cycling event program. 3. Investigate opportunities to include information in event promotional materials about accessing bikes to experience existing signature events, such as Floriade or blockbuster exhibitions – including cycle way linkages between the events and/or exhibitions with hospitality and dining precincts and bike-friendly accommodation. 4. Identify opportunities and develop proposals in collaboration with event organisers, Active Canberra, Venues Canberra and Events ACT to attract to Canberra high profile cycling events – to be developed in line with the <i>2025 Major Events Strategy for the ACT</i>.
International	<ol style="list-style-type: none"> 1. Work with industry to develop/promote export ready cycling experiences, tours and packages. 2. Investigate partnerships and co-op marketing activities with Canberra Airport, airlines, accommodation and national institutions that promote the cycle tourism experience offer.



WE GRATEFULLY
ACKNOWLEDGE THE
EXTENSIVE INPUT,
FEEDBACK AND SUPPORT
PROVIDED BY KEY
STAKEHOLDERS IN THE
PREPARATION OF
THE STRATEGY.

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