

## Rail Museum and Heritage Rail Feasibility Study and Visitor Snapshot for NSW

Rail Museum and Heritage Rail Feasibility Study	
<b>Project name:</b>	Sector feasibility study
<b>Description:</b>	Carry out feasibility study on the likely viability and sustainability of heritage railway groups according to location.
<b>Purpose:</b>	<p>To develop matrices through which THNSW can consider its support of new heritage rail operations, static rail based museums and combined organisations in NSW.</p> <p>Determine the local demographics and tourism throughput requirements to make a community-led, volunteer-based railway museum viable.</p> <p>To provide THNSW with data to help prioritise resourcing, assistance and inclusion of groups into the sector.</p> <p>To provide THNSW with data to help inform discussions with TfNSW, ASA and start-up groups around viability and sustainability.</p>
<b>Deliverables:</b>	<p>The report will cover:</p> <ul style="list-style-type: none"> <li>i) the size and demographics of a population required to support <ul style="list-style-type: none"> <li>a) A volunteer-led railway museum per day of operation per week and per square metre of precinct/building/grounds</li> <li>b) A volunteer-led heritage railway per kilometre of operation and per item of operating rolling stock;</li> </ul> </li> <li>ii) the average costs of operation – per day to open a building to the public, per year to maintain grounds and buildings, per kilometre to maintain track and associated infrastructure, per item of rolling stock (understanding that a trike costs far less to maintain than a steam locomotive and a carriage less than a locomotive)</li> <li>iii) the tourist traffic required to support operations – what is an appropriate minimum level of public engagement (5,000 per year? 20,000 per year?)</li> <li>iv) the level of government funding required for the shortfall – S2, Destination NSW, local Council – for MPM and capital improvements</li> <li>v) the level of local engagement required (local visits and from visiting friends and relatives) to increase visitation if tourist traffic is not available</li> <li>vi) a map of NSW showing the existing groups and the catchment area required for each of them to continue viability</li> </ul>
<b>Background</b>	<p>Every month there are requests for support and collection items from start-up heritage railway groups, taking a lease on a disused railway building and planning to open a railway museum. This has a real impact on existing groups, who are already struggling for relevance, original and unique stories, volunteer support and tourist engagement. Most recently, the planned opening of a railway museum at Bathurst will impact on Zig Zag Railway, Lithgow State Mine Railway and the Oberon-Tarana Heritage Railway, for example, while the desire to open more railway museums at Wallerawang and Tarana further weakens the stability of the existing, supported groups.</p> <p>This report will help THNSW determine which start-up groups should be supported and inform THNSW how to individually support existing groups, looking at their particular locations, demographics and circumstances.</p>

<b>Objectives</b>	Prioritisation in support for existing sector Measurable indicators for supporting (or otherwise) new-start organisations
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<b>Rail Museum and Heritage Rail Visitor Snapshot</b>	
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<b>Project name:</b>	Sector Visitor Snapshot
<b>Description:</b>	Carry out a snapshot study of rail heritage tourism and visitation in NSW. The snapshot should encompass visitor research, already collected data from cultural institutions and a synthesis of up to date visitor research.
<b>Purpose:</b>	To provide a view of the tourist and local visitor market for rail museums and heritage rail operators.
<b>Deliverables:</b>	<p>A snapshot report which details for both static rail museums and heritage rail operations:</p> <ul style="list-style-type: none"> <li>• The size of the rail heritage market for overseas, interstate and domestic tourists in NSW.</li> <li>• Demographic segmentation of rail heritage visitors and a breakdown of their financial contribution to the sector.</li> <li>• A breakdown of how far local visitors are willing to travel to revisit a rail museum or heritage railway.</li> <li>• An optimal price model for a static rail museum and a heritage rail operation based on visitor perceptions of value.</li> <li>• The various drivers behind visitation to rail museums and heritage railways.</li> <li>• A summary of what elements of the experience visitors place value on and the way they engage.</li> </ul>
<b>Background</b>	THNSW is about to undertake a wide ranging program of Strategic Business Planning for rail museums and heritage rail operators across the state. Visitor and audience research will be an important tool to inform the development of these plans.
<b>Objectives</b>	To give THNSW a comprehensive view of the current rail heritage market as well as some tools to use in Strategic Business Planning with the rail heritage sector in NSW.