Potential for Mountain Biking in North Eastern Tasmania

Market Demand and Economic Assessment

March 2013 Prepared for: Northern Tasmania Development
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1 Introduction

This report provides an assessment of the proposed North East Tasmania mountain bike trail network. It provides recommendations on how to best deliver the project as well as its likely social and economic impacts.

This report had built on a number of earlier pieces of work that identified the opportunity for mountain biking in the region. This included: Mountain Biking in Tasmania: A Summary of Current Trends and Future Opportunities (2005), Mountain Bike Tourism Market Profile for Tasmania (2008), Tasmania Mountain Bike Plan (2009), and the recent Mountain Bike Tourism Potential in North Tasmania (2011).

In particular the report considers three trails identified for construction by Northern Development Tasmania. This includes (1) Hollybank, (2) Blue Tier and (3) Cascade Forest trails. It assesses how these trails complement the existing trails in the region to form a comprehensive trail network that will raise the profile of the region as a mountain biking destination.

The social and economic impacts from developing the trail network are also estimated in the report. The impact during both the period of construction and period of operation of the trail network is outlined in the report.
2 Mountain Bike Tourism

Mountain bike tourism is a relatively small but growing niche tourism market. The market is dominated by active mountain bikers that are motivated to travel to destinations primarily or solely because of the trails and the riding experience. However, the market also includes a much larger segment of mountain bikers and casual off road riders who will ride while on holiday in a destination, although bike riding is not their primary reason for the holiday.

2.1 What’s going on?

Over the last decade there have been a huge number of mountain bike specific trails built in Europe, North America, New Zealand and Australia. During this process of trail development, communities and local governments have started to realise the economic and social values of the trails to the community.

Mountain bike tourism is now well recognised as a niche tourism product in Canada and New Zealand. As a result communities and local stakeholders are strategically thinking about how they too can foster mountain bike tourism opportunities in their region.

A look at what is going on in the most established mountain bike communities like Whistler (in Canada), Rotorua (in New Zealand) and networks like the 7Stanes (in Scotland), as well as home-grown examples like Melrose in SA can provide valuable lessons for developing mountain bike riding in Northern Tasmania.

2.2 Iconic and Emerging Mountain Bike Destinations

The collection of iconic and emerging mountain bike destinations presented in the appendix are proof that if you get things right there are significant benefits to be gained from developing mountain bike trails. These benefits include local community engagement and enjoyment, increased participation in recreational activity, the ability to attract a dedicated mountain bike market, business opportunities and economic benefits for the local areas as well as the broader regional and State economies.

The appendix contains an overview table of the several iconic and emerging mountain bike destinations in the world including good Australian examples. Whistler (Canada), Mt Buller (VIC), Melrose (SA), and Rotorua (NZ) are also examined further in the appendix as individual case studies.

2.3 Critical Areas to Consider

- **Trail design** – it is widely accepted and understood that trails need to be designed sustainably. The International Mountain Bike Association (IMBA) Trail Standards are a widely accepted means of achieving sustainable design. Trails must also be designed and constructed primarily for mountain bike use. This means paying careful attention to aspects of design such as the trail gradient (a 5% average trail grade will appeal to a broad range of users). Trails designed for mountain biking can also make good walking tracks (the reverse is not true). This is an important area to consider at the planning and design stage because appealing to a wider range of users (mountain bikers and walkers) often equals more funding opportunities and community support.
  - **Mt Buller, VIC** – designed and built by Glen Jacobs and the World Trail team. Mt Buller provides a mix of cross country and downhill trails that appeal to a broad user range, accessible right from the village. They also have a new trail called
Copperhead, which they believe is a new type of trail called a “flow down”. It can be ridden on a downhill or cross-country (XC) bike. It is generally suitable for a beginner downhill rider or intermediate XC rider, however riders of all levels can enjoy different features.

- **W2K Track, Taupo** – designed and built by mountain bikers for bikers. W2K is a shared use track that now attracts 50% of its use from walkers. Off camber corners and other trail design features limit bike speed on downhill sections, provide a challenge for riders and keep walkers happy too. [www.biketaupo.org.nz](http://www.biketaupo.org.nz)

- **Gallup, New Mexico** - Developing trails for tourism. Most of the trails that have been developed in Gallup are not technical and are very user-friendly. Adventure Gallup & Beyond believes that the majority of visiting bikers are not up to the challenge of technical trails and that by focusing on developing beginner and intermediate trails they can broaden their market and appeal to more people. This approach has created fewer barriers to entry and has made it easier to get the support of other community and State Government partners.

- **IMBA Epics & Ride Centers** – Mt Buller have recently been awarded epic ride status for one of their trails under construction and Taupo, NZ are investigating becoming an IMBA Ride Center. The benefits of becoming IMBA approved are not well documented, but the association certainly has a large membership (over 30,000 individuals in North America plus an Australian affiliate) of bikers many of whom are willing to travel. [www.imba.com/epics](http://www.imba.com/epics)

- **Access** – trails that are easily accessible receive higher use. Networks located close to large urban areas receive high repeat levels of use with regulars riding up 2-3 times per week. However, riders will also travel considerable distances to ride great trails.
  - **Stromlo Forest Park, ACT** – located only 12km from downtown Canberra is easily accessible to ACT riders. Vehicle monitoring has recorded up to 1,000 vehicles per week entering the park. Its location near a major city and airport also makes it an ideal venue for major events like the World Championships, held there in 2009.
  - **Whistler, Canada** – the willingness of mountain bike riders to travel for great trails and infrastructure is evident at Whistler Bike Park. Approximately 63% of riders in the park are from outside Canada and 80% are motivated to travel to Whistler for riding. Seattle is the closest non-Canadian large urban area, which is approximately 4 hours drive south across the border.
  - **7Stanes, Scotland** – seven different mountain bike sites located in the South Scotland area. 80% of visitors to 7Stanes are from outside of the region South Scotland. Ease of access to these sites is partially responsible for this high percentage of visitors coming from further afield.

- **Supporting Infrastructure & Business Opportunities** – the trail provides the hardware for riders, but the “software” is critical to complete the experience and ensure its success. Supporting infrastructure (e.g. signage, maps, transport, toilets) and businesses bring the trail experience to life. While these things tend to happen
organically around trails, a structured and coordinated approach can yield better results more quickly.

- **Shuttle Service, Rotorua** – South Star Shuttles has a concession to operate a shuttle service in the Whakarewarewa Forest. They provide a user paid (single trip, 6 trip or season tickets available) scheduled service for riders using a forestry access road to a high point in the park. The service is used extensively by downhill riders. It is also used by XC riders accessing different trails in the forest. South Star accommodates over 20,000 rider trips per annum. [www.southstaradventures.com](http://www.southstaradventures.com)

- **New Zealand Cycle Trails Commissionable Product** – the Ministry for Economic Development has put together a manual of businesses involved with the New Zealand Cycle Trails. The manual is designed for tour wholesalers and it highlights all the commissionable product associated with the trails (e.g. accommodation, guides, rentals, etc...) [www.nzcycletrail.com](http://www.nzcycletrail.com)

- **Storage and Transport** - these two factors can be potential barriers to the Destination MTB market. Airlines willingness to carry bikes and a clear bike policy, rental car companies providing bike racks ([www.britz.co.nz/britz-bikes](http://www.britz.co.nz/britz-bikes)) and accommodation providers offering secure storage facilities for bikes ([www.whistler.com/bike_accommodation](http://www.whistler.com/bike_accommodation) - see appendix) and bike wash down areas are all important to the Destination MTB market who generally travel with their own bike.

- **7Stanes, Scotland** – Initially the focus for the 7stanes network was on trail building and infrastructure development. But in the last five years they have shifted to widening the market base, attracting new groups into the sport and making it more accessible to more people. The development of family-oriented mountain bike products is growing, as mountain biking parents look for vacation experiences that give them the ability to get their children involved. Playgrounds located near trailheads to cater to family groups have led to an increase in visitation from this market.

- **The Visitor Experience** - while the trail is the critical component for the Destination MTB market, other supporting infrastructure and services complete the experience. An IMBA example of what mountain bikers are looking for is included in the appendix.

- **Bike Friendly Accommodation** - Destinations such as Italy and Scotland have bike specific programmes with well established accommodation consortiums like Italy Bike Hotels ([www.italybikehotels.it/en/](http://www.italybikehotels.it/en/)) and Visit Scotland’s Cyclists Welcome program (see appendix for details on the operator criteria). Both promote accommodations offering a range of bike-specific amenities, packages and customized tours.

- **Management and Maintenance** – Ongoing trail management and maintenance provides a much greater challenge than obtaining funding and finding volunteers to build a new trail.
o **Melrose, SA** - the development of the mountain bike industry in Melrose has been led by a local bike shop, Over the Edge Sports. The bike shop is now wanting to step back a bit and engage the local community in assisting with trail maintenance. They have found it relatively easy to get people involved in building new trails, but the task of maintaining the existing ones, is not as glamorous and harder to find resources for.

o **Bike Taupo, NZ** – Bike Taupo started as a volunteer trail building entity. They faced similar issues to Melrose and other communities with regards to maintaining trails and finding the resources to do this. The group took a quantum leap forward when they enlisted a paid trail builder to maintain the network of 70km). This legitimised the organisation and as a result they attracted further sponsorship and support from local businesses and the local government to fulfil the trail maintenance role.

o **Rotorua, NZ** – the costs of building and maintaining the Whakarewarewa Forest trails are informally shared by: the Rotorua Mountain Bike Club (Inc) through volunteer efforts, charitable trust funding to pay contract part-time trail-builders, the Department of Corrections who organizes Periodic Detention (PD) work crews and Rotorua District Council.

- **Community Engagement** – the long term success of trails is closely linked to the degree of community engagement. Demonstrating the value of trails is important to convince non-riders of the benefits. Community support needs to extend beyond the dedicated trail builders to include the business sector and other community members/groups. In New Zealand Rotary and Lions groups have often been involved in and supported trail development.

- **Whistler, Canada** - The Whistler bike experience is a partnership between Whistler-Blackcomb (the resort and Whistler Bike Park), local government (the Resort Municipality of Whistler), Tourism Whistler, other local businesses and the community (Whistler Off Road Cycling Association, SORCA). Each entity knows their respective roles and responsibilities. The local community clearly value mountain bike tourism and is aware of the social and economic benefits.
  
  www.whistler.ca

- **Makara Bike Park, NZ** – located in the Wellington suburb of Karori, this community led trails and restoration project engaged both mountain bikers and others with a conservation focus. The Makara Peak Supporters Group made a commitment to plant one native tree for every metre of track built. This resulted in a total of 26,000 native seedlings being planted for 25km of single track. The park, the first mountain bike park of its kind in New Zealand, attracts over 70,000 user visits per annum.

- **Marketing and Promotion** – a coordinated and ongoing marketing presence is needed to build awareness and promote the opportunity. This should be a collaboration between Tourism Tasmania, local government, regional tourism organisations and the private sector.

  - **Visit Ruapehu, NZ** – is a regional tourism marketing organisation that has embraced mountain biking and features it prominently on its website www.visitruapehu.co.nz. Visit Ruapehu has taken a lead and worked with operators to develop packages and marketing collateral, and promoted their
trails to over 300 invited travel buyers from 30 markets at TRENZ in May 2012. TRENZ is an annual tourism industry event in New Zealand www.trenz.co.nz.

- **Bike Parks BC, Canada** – a consortium of six of BC’s top lift-accessed bike parks. The group elected to develop print ads for the 2007 campaign to raise awareness and understanding for their product and to dispel some of the misperceptions in the marketplace (e.g. that all mountain biking is extreme). The key messages were: the product is lift-accessed mountain biking, it is accessible to everyone (e.g. women and older adults) and the resorts also offer many other amenities. The photos chosen for the ads are a reflection of these above goals. The photos below portray the rider firmly on the ground as opposed to catching some big air, the chairlifts and a group of women enjoying themselves. www.bikeparksbc.com

- **Events** – events can be an excellent vehicle and catalyst for raising the profile of a mountain bike destination. These range from community based festivals to races and national or international championship events.
  - **Melrose Fat Tyre Festival, SA** – the festival is about fun and the social aspect of biking as opposed to racing. The Melrose event is for families and their target market is riders over 30 years old who generally have more time and money to spend than many of the racers. The event is modelled on the hugely successful Fruita Fat Tyre Festival that has been running for 17 years.
  - **Crankworx, Whistler** – this event grew from humble beginnings to a huge 10 day festival of music and riding. It is a travel motivator for mountain bikers and in 2006 brought 55,000 unique visitors to Whistler, of which 23,000 travelled there solely to attend the event.
  - **Adventure Gallup & Beyond, New Mexico** - is the land manager for City/County/private areas at several trail and outdoor recreation venues in Gallup and McKinley County. AGB promote and utilize these venues as an economic driver. AGB seeks to encourage events, which utilize these trail networks.
  - **Wildside, Tasmania** – is a well-established mountain bike event based over four days that attracts over half of its competitors from outside Tasmania. Events like the Wildside and Blue Dragon are currently driving the majority of Destination MTB visits to North Tasmania.
3 Size and Scope of the Mountain Bike Market

To determine the size and scope of the mountain biking market, it is important to know what’s currently going on with mountain bike tourism and recreation in Tasmania and elsewhere. Without trying to duplicate the work already done in previous Tasmanian mountain bike studies\(^1\), this section provides the basis for determining the potential of the new trail developments proposed (see Section 4).

The following figure illustrates the size of the existing market for mountain bike tourism in Tasmania, which includes both current visitors and Tasmanians participating in mountain biking (e.g. recreation).

- It is important to note that mountain biking is a niche segment, and a subset of cycling. Within the mountain bike market segment riders are generally categorised by either the genre of riding (e.g. cross country, downhill, all mountain – these are not mutually exclusive) and/or their ability (e.g. beginner or advanced).

The existing market equates to approximately 2,300 mountain bikers that ride while visiting Northern Tasmania and 20,000 resident Tasmanians who mountain bike for recreation.

Size and Scope of EXISTING Tasmania Markets for Biking

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\(^1\) Mountain Bike Tourism Potential in Northern Tasmania (2011), Tasmania Mountain Bike Plan (2010), the Mountain Bike Tourism Market Profile for Tasmania (2008) and other site specific reports in Tasmania.
3.1 Tasmania Tourism

Tasmania received 874,400 visitors in YE Sept 2012 according to the Tasmania Visitor Survey (TVS).

Attractions for visitors to the North include the City of Launceston, Tamar Valley Wine Route and Barnbougle Dunes links golf course.

Data from Tourism Tasmania’s TVS provides a picture of what activities visitors participate in while in Tasmania including: “ride a bicycle or mountain bike”.

- In 2011/12 approximately 26,000 visitors to Tasmania rode a bicycle or mountain bike during their trip. This is the highest participation over the last four years and considerable increase from the previous year (TVS, 2012).
- This figure is similar to the number of visitors participating in overnight bushwalks (26,700) in Tasmania, but considerably less than the number who participated in bushwalks of 2 to 4 hours (149,000) or over 4 hours but not overnight (75,300) (TVS, 2012).

This provides an overall sense of the current size of the visitor cycling market for Tasmania of which mountain biking is a key subset.

3.2 Northern Tasmania Tourism

Data from Tourism Tasmania’s Tasmania Visitor Survey (TVS) can also be segmented to provide a profile of visitor numbers to destinations in Northern Tasmania. The following table provides visitor numbers based on ‘places visited on this trip’ in the North from the TVS:

<table>
<thead>
<tr>
<th>Northern Tasmania Destination</th>
<th>Total Visitors 2011/12 (TVS)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Deloraine</td>
<td>149,700</td>
</tr>
<tr>
<td>Scottsdale</td>
<td>91,300</td>
</tr>
<tr>
<td>Derby</td>
<td>52,900</td>
</tr>
<tr>
<td><strong>Total Northern</strong></td>
<td><strong>280,500</strong></td>
</tr>
</tbody>
</table>

Note: Launceston & Tamar Valley received approximately 461,100 visitors in 2011/12 and Hobart City 639,400.

- Based on these figures from the TVS approximately 32% of visitors to Tasmania visit the North and 10.4% visit Scottsdale.
3.3 Tasmania Market (Intrastate & local)

The Intrastate market for biking can be identified through participation in exercise, recreation and sport data\(^2\). Tasmanians participation in cycling\(^3\) totals 44,400 persons over the aged of 15 years, which equates to 11.1% of the population. This participation rate is slightly lower than the Australian rate of 11.9%.

3.3.1 Tasmanian Mountain Bike Market

Determining the number of mountain bikers in Tasmania can be estimated reasonably accurately from a number of sources, namely:

- An Australian Bureau of Statistics survey in 2000 estimated there were 15,300 mountain bikers in Tasmania. This equates to approximately 3.5% of the population. The majority (55%) where located in Hobart, 22% in the North and 23% elsewhere.
- Based on similar (3.5%) participation rates there would be an estimated 17,800 mountain bikers in Tasmania today.
- Based on the strong sales of mountain bikes over the last decade and the increased number of mountain bike specific trails being build, it is reasonable to assume that the number of mountain bikers in the State would be in the range of 20,000 to 25,000 as stated in Mountain Bike Tourism Potential in Northern Tasmania Report (2011).

3.4 The Market Potential

Mountain biking is a good fit with Tasmania’s brand as a nature (and heritage) based destination, well recognised internationally for its walking product. There are several factors that point towards significant potential for mountain bike tourism. Not only are participation rates increasing in Australia and other countries, but better access to more trails is helping further expand and grow the market.

Others factors include:

**Australia**

- There are an estimated 2,081,200 cycling participants in Australia over the age of 15 years (ERASS, 2011).
- Cycling participation in Australia has experienced 45% growth over the last 10 years (ERASS, 2011).
- Participation is also strong in Australia’s key tourism markets such as New Zealand, where cycling participation is 22.7%\(^4\) and mountain biking is a key sector with over 202,000 mountain bikers in New Zealand.

**International**

- Mountain bikes remain one of the largest segments of the bike sales market, although not all are ridden off road. Mountain bikes represent the second largest single specialty bike category (22%) in the US\(^5\).

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\(^2\) Participation in Exercise, Recreation and Sport Survey 2010 Annual Report, Standing Committee on Recreation and Sport 2011.

\(^3\) Cycling includes bmx, mountain biking and cycling, but excludes triathlon.

\(^4\) Active NZ Survey, Sport, Recreation and Physical Activity among NZ Adults (2007/08), SPARC.

\(^5\) National Bicycle Dealers Association, 2010
• Over 3.6 million North Americans were motivated to take a trip in the last two years to go cycling. The overall North American mountain bike motivated travel market is 1.25 million\(^6\).
• British Columbia, Canada attracted 258,000 mountain bikers who were motivated to visit the province in order to go mountain biking\(^7\).
• Strong economic data on the benefits of trails and mountain bike tourism is more readily available from communities and agencies:
  
  o Mountain bike related expenditure from the Whakarewarewa Forest, Rotorua was NZ$8.5 million in 2009\(^8\).
  
  o Trail systems on public lands in North Vancouver, Squamish and Whistler, are estimated to have collectively generated C$10.3 million in spending from riders that live outside of the host community over the period from June 4 to September 17, 2006\(^9\).

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\(^6\) National Bicycle Dealers Association, 2010  
\(^7\) Tourism BC Visitor Survey Analysis, 2008  
\(^8\) Recreational Use and Economic Impact of Whakarewarewa Forest: 2009 Update. Rotorua District Council/APR 2009  
\(^9\) Sea to Sky Mountain Biking Economic Impact Study, MBTA 2006
4 Proposed Northern Tasmania Trail Development Projects

Three trail development projects have been identified in northern Tasmania. The details of each trail development is outlined in the table below and includes a mixture of stacked loop tracks and point to point rides. Point to point rides are those that start and finish in a different location. The locations of these potential trails are included on the map on the following page.

**Trail details for developments**

<table>
<thead>
<tr>
<th>Trail Location</th>
<th>Approx Total Trail Length (km’s)</th>
<th>Trail outline</th>
</tr>
</thead>
<tbody>
<tr>
<td>Hollybank/Mt Arthur</td>
<td>18</td>
<td>Skills park with a combination of loop trail and point to point trail cross country. Green beginner trails through to intermediate blue that has black trail features off these.</td>
</tr>
<tr>
<td>Cascade Forest</td>
<td>35*</td>
<td>Combination of single track loop trail and point to point with downhill options interlinking into an all ready ‘informal’ network of forestry and fire trails. Small amount of green trail that moves into blue with some black options off the main trail.</td>
</tr>
<tr>
<td>Blue Tier</td>
<td>40</td>
<td>Green loop trail at the top of the trail, leading into blue point to point trails that interconnect at varying points along the trail.</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>93km</strong></td>
<td></td>
</tr>
</tbody>
</table>

*approximate only

A Master Plan for the Hollybank trail has been completed as well as a Concept Plan for the Blue Tier trail. Both were completed by Dirt Art. Detailed planning for the Cascade Forest Trail is continuing. These three trails are described in greater detail in the following section of the report.
Location of the three trail development Proposals (NTD, 2013)
4.1 Hollybank

Hollybank Forest Reserve was first identified as a potential mountain biking trail in 2007. The reserve includes both native and exotic forests and is a popular destination for family outings with activities such as treetops adventure and Segway tours. The Hollybank Trail Master Plan and Trail Construction Plan (Dirt Art, 2012) identified Hollybank as best positioned to be the gateway for the North East Mountain Bike Trail Network.

The Hollybank facility has potential to be a hybrid experience, combining approximately 19km of trails with ‘bike park’ elements including a skills park and the opportunity to engage in the true ‘iconic wild ride’ experience that underpins the overall vision for the proposed trail network. This combination offers a diverse network of trails catering for all rider skill levels and demographics.

The proposed trail network also includes a ‘pocket park’ area, which will incorporate a pump track and skills development trail/area which will be a significant attraction particularly to local riders, and will, more importantly, provide avenues for safe skill progression for all riders.

The diversity of the Hollybank proposal means that it suited to all rider skill levels. Whilst much of the network is well suited to intermediate riding, ensuring safe progressions for beginners is important given the proximity of important source markets in Launceston – both local community and tourists. Hollybank will be seen as a gateway facility to the other proposed North East Tasmania mountain bike developments.

The Trail Master Plan suggests that the proposed Ginger Ridge Trail in the foothills of Mount Arthur will provide the real ‘hook’ and point-of-interest for riders by providing a true ‘adventure riding experience’ with a sustained climb and descent. The descent for this loop may also be shuttled via a quality, 2WD gravel road, adding significant appeal for all mountain and gravity-focussed riders.

The pump track is expected to also significantly boost the appeal of the site for local riders, who have no access to authorised facilities of this style in the Launceston area.

There is a strong market for the Hollybank site that includes the range of riders from beginner to advanced and local riders as well as tourists. A stronger market share will be encouraged if:

- Hollybank is differentiated from other trails through the mix of tracks and facilities as well as reflecting the natural attributes of the site in trail design as a point-of-difference over other trails.
- Positioning Hollybank as a gateway to the proposed trail network across North East Tasmania
- Developing as an appealing gateway
- Providing some elements of an ‘adventure riding experience’

A map of the proposed facility is provided below.
4.2 Blue Tier

The Blue Tier Mountain Bike trail system proposal includes 40km of intermediate and advanced mountain bike through the myrtle and eucalypt forests of the forest reserve. The Blue Tier trails involve a significant elevation change, offering a sustained climb and descent, which may also be shuttle accessed via a public 2WD-suitable gravel road.

The concept plan developed by Dirt Art for the trail system proposes smaller loop options at two points up the mountain, offering potential for riders to ride either the upper or lower mountain independently.

The Concept Plan proposes a vehicle shuttle access to the upper trail head which would prove highly popular with some riders, particularly those with a gravity/all mountain preference. Those wishing to ride uphill would not need to use the shuttle access.

The concept plan (Dirt Art, 2012) suggests Blue Tier is best targeted to intermediate-advanced rider skill levels, though with a focus on intermediate riding. To ensure attraction to the broader market, it is important to ensure that there are adequate trails suited to the intermediate level riders.

Given the existing mountain bike experiences in Launceston cater predominantly for intermediate riders it is vital to give these riders as well as advanced riders a reason to travel to Blue Tier.
Targeting a mix of intermediate and advanced trails is the best approach to achieving reasonable market share because

- Advanced and intermediate riders are more likely to travel further to access a trail
- The condition of the trail can be variable, with riders having sufficient skill to ride the trail in most conditions
- There are already trails that cater for the beginner market in closer proximity to Launceston
- Beginner riders may favour other locations for riding that are closer to other services and attractions
- Advanced and intermediate riders are likely to ride for longer than beginners and will use more of the track.

The Blue Tier trails will attract the true ‘destination mountain biker’, though the appeal will also be very high for local riders looking for an ‘adventure riding’ experience.

A map of the proposed trail is below.
4.3 Important Areas for Trail Development

Developing the right trails and experiences is critical to attracting the intended target markets. The following bullet points provide some guidance on the proposed trail developments.

4.3.1 Trail Type and Grade

The type of trail and grade should be designed for the intended market. The easier the trail, logically the broader the market and the more people that will be able to ride. The market will consist of both ‘destination mountain bikers’ and also people that mountain bike while visiting Tasmania (not the primary purpose of their visit).

The majority of the trails developed should be aimed at the beginner-intermediate end of the spectrum. Generally the most popular and well used trails in a network are the easily accessible beginner and intermediate trails. The inclusion of more technical alternative lines/routes that veer off the main easier route and rejoin can enhance the trails appeal to more advanced riders.

4.3.2 A Phased Approach

It makes sense to phase the development of the three trail projects for the following reasons:

- Availability of funding
- Resources and expertise to build the trails
- Allows time to engage with communities and highlight business opportunities
- Ability to learn lessons from the completed trail projects
- Target and grow markets

4.3.3 Support Infrastructure

A high quality trail system designed to encourage destination mountain bike riders should also be supported by appropriate infrastructure that makes it easy to enjoy the trails. The infrastructure should include information sources for pre-trip planning, website, trail guides on apps, trail maps, signage and information shelters, and a variety of additional bike friendly conveniences.

Locating trailheads near towns or existing tourism/forestry infrastructure is important to maximising their potential.

- Hollybank – the opportunity to link into the existing tourism product and infrastructure at Hollybank will improve the trail experience e.g. locating the trailhead near Hollybank Treetops Adventure. This location appears to be the best suited for beginner trail experiences given the easy access from Launceston and other activities (e.g Treetops walk and ziplines).
- Blue Tier – this area is gaining exposure from the Blue Dragon MTB Challenge and editorial in the Australian Mountain Biker. Having the trailheads located as close to existing infrastructure in Derby or near the Weldborough Hotel will benefit the experience in this more remote location.
- Cascade Forest – It is proposed that the Cascades Forest trail will be approximately 35km of trails designed to suit the intermediate rider. The trails will be single track with a combination of loops, downhill and point to point. Its location near Derby will
make use of the ‘informal’ riding trails that are the forestry and fire trails. As well as this it is in proximity to the Blue Tier trail network that holds the Blue Dragon event every year and already crosses over to some of these ‘informal’ trails for some of the event.

4.3.4 Marketing & branding

The mountain bike trails will need to be promoted as a network of tracks and mountain bike experiences (e.g. 7Stanes - seven mountain biking trail centres spanning the south of Scotland). The three trail developments will need a consistency in design and construction, the experience, signage, maps, whilst also emphasising the unique attributes that make each trail and area unique.

It is also important to integrate the existing mountain biking trails (e.g. Kate Reed and Trevallyn) and North East Rail Trail as part of the overall product offering for the north region. Some of these have already been allocated funding for trail development.

It is recommended that initially the marketing should be focused on improving consumer perceptions of North East Tasmania as a mountain bike destination. Marketing activities will increase the awareness of the new trails, and promoting the trails as a complete network under one brand is likely to provide more effective results.

It is recommended that a brand strategy be developed for the trail network. A brand is more than just a logo and tag line and includes how consumers perceive the region and what they think of it. A unique brand for the network of mountain bike trails will give weight to marketing activities that promote the mountain bike experiences. It will also assist consumers better understand the extent of the trail network and its offering.

All marketing activities should be undertaken in a coordinated approach through collaboration of all marketing and promotional organisations applicable to the region. This includes local councils, Tourism Northern Tasmanian and Tourism Tasmania at a state level. The mountain bike experiences of the region need to be reflected consistently in marketing communications about the region. They also need to specifically target relevant markets to be most cost-effective.

Mountain bike riders are a demographic that is known to be tech-savvy and communicate via Facebook, Twitter and smart phone. This will be the best way of getting information out about the network. Incorporating the mountain bike planning and marketing into the Destination Management Plan that is about to be commenced by NTT will be critical.

Further detail on the proposed marketing approach is provided in section five of the report.

4.3.5 Trail Maintenance and Ownership

Links to nearby communities and towns are critical for the ongoing maintenance and ownership of trails. Locals that see the value of trails and the opportunities they can bring to a region will be strong advocates and volunteers. However, having paid trail maintenance crews is important to maintaining a high quality product.

Forestry Tasmania’s will remain the land managers of all the proposed sites. The local councils will be responsible for funding the maintenance of the trails for five years post
construction of the trails. This will ensure the quality of the trails is maintained. The three Councils of Launceston, Dorset and Break O’Day are likely to form an agreement to maintain the trails through shared resources. This will increase efficiency of the maintenance program.

4.4 Commercial Opportunities

Development of the North East Tasmania mountain bike trail network and growth in visitor numbers through effective marketing could present a number of commercial opportunities. These are outlined below.

4.4.1 Mountain bike hire

Mountain bikes are an expensive commodity. Many people will prefer to try mountain bike riding before they invest in a bike. Visitors to the area unaware of the trail network may also wish to hire bikes. A mountain bike hire service combined with spare parts and repairs is likely to become a viable business over time. A service that allows for consumers to hire at one location and ride to and return at another location would be useful.

4.4.2 Instruction and Guided Mountain Bike Tours

New riders and visitors may well seek either a guided mountain bike experience or instruction in downhill or single track techniques. A guided mountain bike tour could be modelled on the structure of similar operations such as those at Melrose in South Australia. These involve a guide escorting up to six riders on a designated section of track. Instruction or ‘rider clinics’ could also be provided with an operator providing skills training for beginner to intermediate riders. This could include riding etiquette, bike handling, safety, use of brakes, and manoeuvring the bike in difficult conditions.

There are existing bike hire and tour companies in the region that may provide these services for visitors. Otherwise, new businesses may be attracted to the region.

4.4.3 Rider and Bike Shuttle Service

Many of the proposed rides are point to point trails requiring transport to connect riders with/from their vehicles at the end or start of the ride. There is an opportunity for a shuttle service to ferry riders and their bikes either from or to their accommodation, or to operate between the trail heads. It is likely that a guiding business or local bus service could undertake this service.

4.4.4 Sponsorship

Sponsors could be sought to provide resources for the maintenance of the trail or hosting of events. The values of the potential sponsor would need to align with the brand and values of the North East mountain bike trail network.

4.4.5 Events

There is an opportunity to host mountain bike events on the trail network. Tasmania already has two well-established events that include the Blue Dragon Mountain Bike Challenge. The Blue Dragon is a two-day event in the Blue Tier area. The four-day Wildside MTB 200km from Cradle Mountain to Strahan on the West Coast is a very popular event that attracts a significant number of interstate bikers. A mountain bike event can improve
awareness of the trail network as well as generate revenue through sponsorship and through entry fees or participants. Approach to Marketing

The recommended approach to marketing mountain bike experiences in Northern Tasmania is included in this section of the report. It includes the market positioning which is the platform on which marketing will be undertaken. The approach outlines the target markets, key messages and tools that would be used to effectively reach and influence visitation by the target markets.

Our approach builds on the market analysis work contained within the Mountain Bike Tourism Market Profile for Tasmania (2008), Tasmania Mountain Bike Plan (2009), and the recent Mountain Bike Tourism Potential in North Tasmania (2011).

Approach to Marketing Overview

4.5 Positioning

The positioning provides the framework for all marketing activity. The mountain bike trails will provide world class infrastructure specifically designed for mountain bikers by some of Australia’s premier trail builders. The trails will be located in the iconic landscape of Northern Tasmania and close to vibrant rural towns.

The finished trail developments will put Northern Tasmania on the map as one of the ‘must ride’ mountain bike destinations in Australia, along with other established destinations like Forrest, Melrose, Mount Stromlo, the You Yangs and Mt Buller.

Northern Tasmania Development Vision: To develop world-class mountain biking experiences in northern Tasmania to attract local, national and international riders and adventure seekers. Sustainable trails will enhance the liveability and appeal of the region by showcasing the natural environment and heritage of the area. The construction of trails in
The north east will be the first phase of ongoing investments in mountain biking infrastructure across the region.

The concept of mountain bike experiences within Tasmania’s iconic landscapes is a great fit within the Tourism Tasmania brand and its three core appeals of:

- Nature
- Cultural heritage
- Food & wine

The new mountain bike trails will strengthen Tasmania’s position as an outdoor destination and complement the established Great Walk experiences such as the Overland Track, Bay of Fires and Mara Island (www.greatwalkstasmania.com).

Strong links to a MTB Tasmania website and mountain bike specific content and pages on the Discover Tasmania website will be critical.

4.6 Key Messages

The marketing messages for the MTB trails project will be based on the overall positioning and can be aimed at the target market segments.

- The destination mountain biker is looking for amazing trails in scenic landscapes. The quality of the trail experience is the main consideration; and
- Those that bike on holiday are more focused on other aspects of the destination like the landscape, people and culture (i.e. mountain biking is not the primary travel motivator).

The main messages should be focused on the following three aspects of the trail experience:

**The Trails** – sustainable world-class trails designed and built by Australia’s leading mountain bike experts specifically for mountain biking with a high standard of facilities. The trail experience offers a strong sense of nature and remoteness, whilst being accessible.

**Landscapes** – the landscape is distinctively Tasmania and the three trail development locations offer quality environments that include mountains, alpine plateaus and forestry reserves with expansive views and very different ecological environments offering riders a unique experience.

**The People & Communities** - the three trail networks are easily accessible from the communities of Derby, Weldborough, and Scottsdale and give mountain bikers the opportunity to meet and interact with locals and explore the communities. Northern Tasmania has established accommodation providers and tour operators that specialise in providing quality services to mountain bikers.

How the messages will be communicated eg via imagery and text is covered in section 7.5.

4.7 Marketing Objectives

The role of coordinating the marketing initiatives for mountain bike experiences in northern Tasmania would logically sit with Northern Tasmania Tourism, or potentially an independent trust focused solely on the trails. This entity would have strong partnerships with the local governments, Forestry Tasmania, NTD and operators in the MTB industry.
The opportunity to partner with and/or receive sponsorship from bike manufacturers and other businesses associated with the industry should also be considered.

Strong links and a coordinated approach to mountain bike promotion throughout the State of Tasmania in partnership with Tourism Tasmania are also very important. The marketing objectives of the organisation responsible for the promotion of the mountain biking experiences should include:

- Develop awareness of North East Tasmania as a mountain bike holiday destination
- Increase visitation to the region by mountain bikers and their families

To achieve the marketing objectives the organisation should develop a three year marketing strategy. This would outline the specific strategies and resources that would be undertaken to achieve the objectives. The organisation would also need to monitor the implementation of the strategies against targets. An outline of the marketing strategy is provided in section five of the report.

4.8 Target Markets

As outlined in Section 5.1 there are two distinct visitor markets that include more niche ‘destination mountain bikers’ and the much larger ‘mountain bike while on holiday’ market. The markets can also be assessed geographically: intrastate, interstate and international.

**Destination Mountain Bikers**

These riders are typically male, 30-50 years old, well-educated and from high-income brackets\(^\text{10}\). This market largely mirrors the existing MTB event market in the North.

Destination Mountain Bikers have intermediate to more advanced riding skills and regularly travel to mountain bike and would likely have visited other Australia or international MTB destinations.

These riders seek high quality trails with good supporting infrastructure in scenic/natural locations.

**Mountain bike riding while on Holiday**

This segment may include experienced mountain bikers but are generally categorised as beginner to intermediate. They view mountain biking as a secondary motivation for their visit, will likely hire bikes, may place less emphasis on the trail and more on the setting and nearby attractions and amenities.

In terms of a profile they are more closely associated with existing Tasmania market segments such as the adventure seekers.

The target markets for each particular trail can also be categorised by the experience level of the rider. Whilst the network as a whole will target all levels of mountain bike riders, different communication and strategies are required to reach beginner riders compared to advanced riders.

Each of the trails is different. Some are more suited to beginners and others to intermediate-advanced riders. These differences need to be clearly communicated to

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\(^{10}\) Mountain Bike Tourism Potential in North Tasmania (2011), Six Dot Consulting
consumers so that they can choose the most suitable mountain biking experience. There also needs to be consideration for the local community and Tasmanian versus interstate markets.

The table below provides a recommendation on the skill level each trail should (or currently is) targeting.

<table>
<thead>
<tr>
<th>Trail</th>
<th>Primary Target Market</th>
<th>Secondary Target Market</th>
</tr>
</thead>
<tbody>
<tr>
<td>Blue Tier</td>
<td>Intermediate</td>
<td>Advanced</td>
</tr>
<tr>
<td>Hollybank</td>
<td>Intermediate</td>
<td>Beginner</td>
</tr>
<tr>
<td>Cascade Forest</td>
<td>Intermediate</td>
<td>Advanced</td>
</tr>
<tr>
<td>Kate Reed</td>
<td>Beginner</td>
<td></td>
</tr>
<tr>
<td>Trevallyn</td>
<td>Beginner</td>
<td></td>
</tr>
</tbody>
</table>

### 4.9 Marketing and Advertising Tools

All marketing activity will be in line with the overarching brand for the Northern Tasmanian mountain bike trails. A range of tools will be employed to promote the destination and the trails in particular. These tools, particularly those that are internet enabled will be able to capitalise on Northern Tasmania's involvement as one of the 'pilot areas' for the Australian Government's National Broadband Network.

There would be subtle changes and differences for each of the two target markets in terms of the messages through each of these marketing and advertising tools.

**Website**

Having a high quality and media rich website that illustrates the mountain biking opportunities and trail networks in Northern Tasmania is critical. The website will be an important source of information for potential mountain bike visitors who are well educated and internet savvy.

The website will need to use rich media tools (video, blogs, photos and interactive maps) to capture the imagination of bikers and entice them to ride Northern Tasmania’s trails. The website should also provide information that makes trip planning easy. This includes accommodation and transport links as well as competitive packages.

Links to and from the website from other biking, visitor destinations, and Tasmania visitor attraction sites are also an important part of its function.

At the State level there needs to be a prominent landing page for mountain biking on Discover Tasmania that presents the biking opportunities in the state including the North.

- **The 7 Stanes** website that promotes the 7 trail networks in south Scotland is also an excellent example of a comprehensive and well designed website that provides mountain bikers with all the information to make an informed decision about travelling.
to Scotland to mountain bike [www.7stanesmountainbiking.com](http://www.7stanesmountainbiking.com). There are also links to the 7 Stanes website from Visit Scotland, which has a mountain biking page, although it is somewhat buried: [http://www.visitscotland.com/see-do/activities/mountain-biking/](http://www.visitscotland.com/see-do/activities/mountain-biking/)

- **Bike Buller** is a good example of a website that provides all the necessary information for potential MTB visitors: trail maps, bike shuttle information, accommodation, YouTube videos of new trails, images, trail reports, clinics, bike rentals, Ben’s Bike Buller Blog and links through to their Facebook page.


The website should also be integrated with other websites such as mountain biking associations (e.g. International Mountain Bicycling Association Australia) and clubs and linked to interstate clubs. This includes for event information on club calendars.

**Social Media**

In addition to a website dedicated to Northern Tasmania mountain biking, social media tools like Facebook and YouTube provide a way to personalize the Northern Tasmania mountain biking experience and help spread the message in a relaxed and conversational way. This allows user generated content, which is arguably more credible to consumers. A Facebook page should also be created to complement the website and communicate with the market more directly.

Other social media channels that connect mountain bike riders include online forums such as MTB Dirt Mountain Bike Social Networking site. These are networks where riders go to learn and share stories of their mountain biking experiences.
However, social media requires resources (time) and a consistent and ongoing effort to yield results.

The role of mobile marketing is also an important area to consider with the website and social media as travellers begin to access more and more information via mobile web and smart phone applications. As social media and mobile communications continue to converge, the use of smart phones continues to grow.

**Public Relations and Editorial**

The trail network has potential to generate considerable publicity. This could be achieved through traditional media such as newspapers, television and radio as well as digital media. Editorial, as opposed to advertising, has a much stronger and longer lasting impact as it uses third-party opinion to tell the story or sell the experience. Getting editorial content involves supplying press releases, imagery, offering media familiar trips and building stories around famous people riding the trails.

Appealing to the destination mountain bikers through quality feature articles in niche magazines can carry a lot of weight. These include: Australian Mountain Bike, Mountain Biking Australian, Australian Geographic and potentially New Zealand magazines like Spoke, New Zealand Mountain Biker and Wilderness. The media kits for these magazines generally provide good profiles of their readerships, which can assist in selecting the one(s) to focus on.

Events like the Blue Dragon have achieved good editorial coverage in the past, such as the three-page article in the April 2010 issue of Australian Mountain Bike.

Newspaper editorials in prime geographic markets such as Melbourne (The Age), Hobart (The Mercury) and Sydney (Morning Herald) will have a broader market reach including the bike while on holiday market.

Editorial often reaches a much broader audience than the target market. For this reason it could have a significant influence on enhancing the profile and awareness of the region as a tourism destination across the broader market.

**Advertising**

Paid advertising in traditional print media such as magazines and newspapers as well as regional TV and online will support other marketing initiatives mentioned in this section.

**Cooperative MTB Advertising Campaigns** - establish a programme to enable collaboration between the private sector (tourism operators) and the local government/RTO and or NTD with 50/50 funding available. Cooperative advertising programmes can also help facilitate collaboration within the region and packaging of MTB experience for bikers.

- **Internet** – paid placements on key websites that are suited to the target markets, some of the more popular global ones for mountain bikers include: pinkbike.com, mtbr.com, bikeradar.com, sickliness.com, nsmb.com and singletrack.com. These are regularly read by Australian and New Zealand riders and include content from Australasia.

- **Print** – paid placements in key publications that are suited to the target markets, see the magazines and newspapers as detailed in Public Relations and Editorial above.

- **Regional TV** – this should be considered for the Melbourne market if there is a good MTB target market and TV audience match.
Events

Events are a great medium for building awareness and targeting the destination mountain biker.

Developing new events that can showcase the new trail networks to mountain bikers will be an effective means of reaching new audiences and complementing the existing and well established MTB events. Events also provide people with a strong call-to-action for visitation and can be an effective promotion tool.

Collateral

Traditional collateral in the form of brochures will still be an important component of a marketing plan and complement the advertising and editorial forms. Brochures would be distributed through visitor centres, at trade and consumer shows and at other key visitor sites in Tasmania. A professional digital image library and digital video footage would also be required for use in all marketing activities including supplying to the media.

Partnerships

There are significant opportunities to form partnerships with other organisations to co-promote the NEMTB and its activities. This could include the Parks and Wildlife Service or an industry partner such as mountain bike manufacturer. Partnerships enable resources to stretch further an often provide access to new promotional channels. They can be an effective component of the marketing strategy if leveraged effectively.

Travel trade

Although travel trade are unlikely to be the key focus (especially initially), it is important to have for example: familiarisation trips\(^\text{11}\) and presentations to Tasmania information centre staff and Tourism Tasmania staff, specialised MTB tour operators, and attending relevant (e.g. bike or outdoor) trade shows and events. For example, AusBike Expo (www.ausbike.com.au) in Melbourne.

Research and Monitoring

Research and monitoring are key components of a good marketing plan. The online tracking and monitoring is generally easily handled through free tools like Google analytics. Primary research should also be undertaken on an ongoing basis to better understand the MTB markets, this could include having MTB specific questions in established surveys such as the Tasmania Visitor Survey (TVS) or regular surveying at the individual trails.

\(^{11}\) A free (or low cost) trip for travel agents or information centre staff, provided by an operator as a means of increasing awareness for their service.
5 Delivery strategy

This section of the report provides recommendations on actions, responsibilities and delivery partners to develop the North East Tasmania mountain bike trail network. Delivering the project will require coordination of three major elements:

1) planning and development
2) marketing and promotion
3) stakeholder engagement.

The interactivity of these three elements is included in the overall strategy.

<table>
<thead>
<tr>
<th>Planning and development</th>
<th>Marketing</th>
<th>Stakeholder engagement</th>
</tr>
</thead>
<tbody>
<tr>
<td>Hollybank trail complete</td>
<td>Blue Tier trail complete</td>
<td>Cascade Forest trail complete</td>
</tr>
</tbody>
</table>

The proposed project timeline demonstrates the required actions to develop the mountain bike trail network. It shows that a staged approach to development is proposed. It also shows that planning and stakeholder engagement processes are ongoing and required throughout the project but especially in the initial planning stages of the development.

Marketing and promotion of the development should be gradual with activities increasing as development is completed.

5.1 Planning and development

Implementation of the North East Tasmania mountain bike trail network can be broken into two stages: (1) planning and construction, and (2) operation.

5.1.1 Planning and Construction

New trails will be developed at Blue Tier, Hollybank and Cascade Forest. Some existing trails may also need to be improved. Works to existing trails are more straightforward than construction of new sections of track, as they may not trigger requirements for planning permits and other approvals.

The construction of new sections of trail is a more complicated process. The general process for construction of these new sections of trail is:
1. Define the exact route – this step would be undertaken by trail designers through extensive on ground investigations.
2. Conduct flora and fauna surveys and cultural heritage surveys of the exact route – this step would be undertaken by consultants experienced in these fields and would identify any areas with significant environmental or cultural heritage values that should be avoided by the proposed trail. This may lead to sections of the proposed route being changed.
3. Seek relevant approvals – this would be undertaken by the proponents of the project and would require consultation with Forestry Tasmania and other relevant authorities;
4. Commence construction works.

It may make sense to phase the development of the two trail projects for the following reasons:

- Availability of funding
- Resources and expertise to build the trails
- Allows time to engage with communities and highlight business opportunities
- Ability to learn lessons from the completed trail projects

The recommended timeline for the phased construction of the development is outlined in the table below. A conservative estimate of construction time has been included based that work on the trails may be limited by weather and conditions.

<table>
<thead>
<tr>
<th>Action</th>
<th>Timing</th>
</tr>
</thead>
<tbody>
<tr>
<td>Hollybank approvals completed</td>
<td>August 2013</td>
</tr>
<tr>
<td>Hollybank construction</td>
<td>Sept – Dec 2013</td>
</tr>
<tr>
<td>• stage one</td>
<td>July – Dec 2014</td>
</tr>
<tr>
<td>• stage two</td>
<td></td>
</tr>
<tr>
<td>Blue Tier approvals completed</td>
<td>Sept 2013</td>
</tr>
<tr>
<td>Blue Tier construction</td>
<td>Dec 2013 – Nov 2015</td>
</tr>
<tr>
<td>Cascade Forest concept and master plan</td>
<td>August 2013</td>
</tr>
<tr>
<td>Cascade Forest approvals</td>
<td>Oct 2013</td>
</tr>
<tr>
<td>Cascade Forest construction</td>
<td>Jan 2014 – Dec 2015</td>
</tr>
</tbody>
</table>

These timings include a contingency for a 3 months shut down in the construction of Blue Tier and Cascade Forest due to weather.

5.1.2 Operation

Forestry Tasmania’s will remain the land managers of all the proposed sites. The local councils will be responsible for funding the maintenance of the trails for five years post construction of the trails. This will ensure the quality of the trails is maintained. The three Councils of Launceston, Dorset and Break O’Day are likely to form an agreement to maintain the trails through shared resources. This will increase efficiency of the maintenance program.
5.2 Marketing and promotion

The marketing tools and strategies available for the promotion of the trail network were outlined in section four of the report. In particular it described the niche channels available to effectively target special interest mountain bike riders. It is recommended that the marketing and promotional strategy for the trail network is developed to effectively target this special interest group. However, other activities will also be required to change broader consumer perceptions and the profile of North East Tasmania as a mountain bike riding destination.

A recommended outline of the marketing strategy is outlined below.

<table>
<thead>
<tr>
<th>Medium</th>
<th>Planning stage</th>
<th>2013</th>
<th>2014</th>
<th>2015</th>
</tr>
</thead>
<tbody>
<tr>
<td>Website</td>
<td>Establish website</td>
<td>Include detailed consumer information for Hollybank Trail (on completion)</td>
<td>Ensure partners / sponsor organisations are profiled on the website, including bike hire and tour companies.</td>
<td>Include detailed consumer information on Cascade Forest and Blue Tier (on completion)</td>
</tr>
<tr>
<td></td>
<td>Provide clear communication on project plans</td>
<td>Develop UGC (user generated content) to support the experience such as videos etc... (ongoing)</td>
<td>Strengthen links with social media channels through the website.</td>
<td></td>
</tr>
<tr>
<td>Social Media</td>
<td>Develop basic social media channels to communicate information only</td>
<td>Further engage on social media to enable the sharing of stories about Hollybank and mountain bike riding experiences in the region</td>
<td>Continue to engage with interest groups about the project status of the trail network development</td>
<td>Engage with MTB forums to promote the completion of the trail network</td>
</tr>
<tr>
<td>Public relations</td>
<td>Communicate project across the local region</td>
<td>More broadly engage with public to promote the completion of Hollybank and the planning of the other trails.</td>
<td>Ongoing engagement</td>
<td>Communicate completion of the project</td>
</tr>
</tbody>
</table>
### Advertising

| trail network | None | Undertake advertising towards of Hollybank trail to destination mountain bikers as well as local MTB riders. | Maintain some promotion activities for Hollybank | Undertake high intensity advertising for destination mountain bikers in key target market regions following completion of the trail network. |

### Collateral

| trail network | Develop consumer-focused flyers and material to promote Hollybank Distribute in key centres. | Develop further marketing collateral for the trail network. Distribute in key market areas. |  |  |
5.3 Stakeholder engagement

Stakeholder engagement is required throughout the planning, construction and operational phases of the project. The information below provides guidance on stakeholders in the project and approaches to engaging with them.

Engagement needs to be ongoing. It is important to have open and transparent dialogue with stakeholders throughout the project. In particular they need to be aware of the project, its impacts and objectives during the planning stages. During this stage the project design should consider different stakeholder needs and agendas. Overall, stakeholders are an important resource to help make the project a success.

Engagement strategies for stakeholder groups are outlined in the table below.

<table>
<thead>
<tr>
<th>Stakeholder</th>
<th>Activity</th>
<th>Timing</th>
</tr>
</thead>
<tbody>
<tr>
<td>Community</td>
<td>Provide information and details about the project to inform the local communities</td>
<td>2013</td>
</tr>
<tr>
<td></td>
<td>Ensure mechanics are in place to collect and address community concerns or questions relating to the project</td>
<td>2013-2016</td>
</tr>
<tr>
<td></td>
<td>Ensure that up-to-date information on the project is available through the construction phases</td>
<td>2013-2016</td>
</tr>
<tr>
<td>Local mountain bikers</td>
<td>Engage the local mountain bike community to be champions of the project</td>
<td>2013</td>
</tr>
<tr>
<td></td>
<td>Work with the local riders to build awareness of the trail and reviews within social media. For example uploading of videos etc...</td>
<td>2014-2016</td>
</tr>
<tr>
<td>Other MTB destinations in Tas.</td>
<td>Establish links or partnerships with other mountain bike destinations in Tasmania.</td>
<td>2014</td>
</tr>
<tr>
<td></td>
<td>Work with other destinations to promote mountain biking in Tasmania to the interstate market.</td>
<td>2016</td>
</tr>
<tr>
<td>Mountain bike clubs and associations</td>
<td>Engage mountain bike clubs and associations to support and promote the new trails</td>
<td>2014-2016</td>
</tr>
<tr>
<td>Local businesses</td>
<td>Keep local business informed of the project status and opportunities it might bring to the region</td>
<td>2013</td>
</tr>
<tr>
<td></td>
<td>Work with local businesses to identify and develop services for mountain bike visitors. This could include joint funding applications for new businesses or infrastructure.</td>
<td>2014-2016</td>
</tr>
<tr>
<td>Landcare</td>
<td>Engage Landcare groups to be involved in trail maintenance. Develop a volunteer program.</td>
<td>2014-2016</td>
</tr>
<tr>
<td>Tourism Northern Tasmania</td>
<td>Engage their support in the development of the visitor experiences associated with the trail network. Funding may also be available</td>
<td>2013</td>
</tr>
<tr>
<td>Existing tourism operators</td>
<td>Work on collaborative advertising or promotional campaigns to build awareness of the trail network</td>
<td>2014-2016</td>
</tr>
<tr>
<td>----------------------------</td>
<td>--------------------------------------------------------------------------------------------------</td>
<td>-----------</td>
</tr>
<tr>
<td></td>
<td>Work together on visitor monitoring / research on satisfaction of experience and product in NE Tasmania</td>
<td>2016</td>
</tr>
<tr>
<td></td>
<td>Work with existing tourism operators in the region such as Treetop Adventures to develop additional capacity or services for the expected increase in visitation to the region.</td>
<td>2013-2016</td>
</tr>
</tbody>
</table>
6 Development of Growth Scenarios

This section provides a forecast of demand for mountain biking with the completion of the trail network i.e. development of the proposed three trails. A base case growth scenario is also provided. This is a forecast of demand for mountain biking if the three trails were not developed.

Tasmanian visitor data and other regional sources as well as mountain bike tourism and destination data have been used to develop these estimates.

6.1 Base case

The base case provides a forecast of demand for mountain biking if the trail network was not completed i.e. it assumes that no additional trails or facilities are developed for the mountain bike market. The forecast is provided for two market groups:

- **Existing Visitors to North Tasmania** – this market has been calculated based on the Tasmania Visitor Survey (TVS) data.
- **IntraState (MTB)** – this market is based on the number of recreational cyclists in the Tasmanian population.

Note, in estimating the existing (and potential) markets for mountain biking in North Tasmania two types of mountain bike visitor have been identified.

1. **Destination MTB** visitors who are motivated to travel to North Tasmania for mountain biking; and
2. **Visitors who mountain bike while visiting**, but were not motivated to visit by mountain biking.

Based on the information presented in Section 3 it is estimated that 5,776 visitors currently mountain bike ride in Northern Tasmania. Under the ‘base case’ it is assumed that mountain bike participation grows at a rate of 1.5%p.a. in Northern Tasmania (i.e. without trail enhancement or development). Under this assumption there would be 6,217 mountain bike visitors in Northern Tasmania in 2018.

"Base Case" forecast of Mountain Bike Markets in Northern Tasmania, 2018

<table>
<thead>
<tr>
<th>Visitor Market</th>
<th>Destination MTB</th>
<th>MTB while visiting</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Existing Visitors</td>
<td>400</td>
<td>2,289</td>
<td>2,689</td>
</tr>
<tr>
<td>IntraState (MTB)</td>
<td>840</td>
<td>2,688</td>
<td>3,528</td>
</tr>
<tr>
<td><strong>Total MTB Visitors</strong></td>
<td><strong>1,240</strong></td>
<td><strong>4,977</strong></td>
<td><strong>6,217</strong></td>
</tr>
</tbody>
</table>

6.2 With project case

The ‘with project case’ provides a forecast of mountain bike visitation to the region assuming the completion of the proposed trail network. The forecast estimates there would be 21,360 mountain bike visitors in Northern Tasmania in 2018. Assumptions used to calculate this forecast are outlined below.
Assumptions:

- The three proposed trails are completed on schedule providing an additional 100km of mountain bike trails in the region
- Well marketed and maintained trails
- Clear signage and easily accessible trails
- Extensive community support for trail networks
- Number of visitors biking while visiting Tasmania doubles over 5 years from 2.5% to 5%
- North Tasmania captures a greater (increases from 39% to 50%) share of Tasmania’s visitors that bike market
- The portion of mountain bikers within the “bike while visiting Tasmania” segment increases from 32% to 40% (TVS)
- Northern Tasmania attracts a greater (increases from 25% to 60%) share of Intrastate mountain bikers outside the region. Approximately 50% are destination MTB visitors and 50% are mountain biking while visiting.

“With project” forecast of mountain bike visitation in Northern Tasmania, 2018

<table>
<thead>
<tr>
<th>Visitor Market</th>
<th>Destination MTB</th>
<th>MTB while visiting</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Existing Visitors</td>
<td>n/a</td>
<td>8,000</td>
<td>8,000</td>
</tr>
<tr>
<td>IntraState (MTB)</td>
<td>4,680</td>
<td>4,680</td>
<td>9,360</td>
</tr>
<tr>
<td>Destination MTB</td>
<td>4,000</td>
<td>n/a</td>
<td>4,000</td>
</tr>
<tr>
<td>Total MTB Visitors</td>
<td>8,680</td>
<td>12,680</td>
<td>21,360</td>
</tr>
</tbody>
</table>
7 An Assessment of Socio Economic Benefits

The development of the trail network will provide economic, environmental and social benefits for Tasmania. This section of the report provides assessment of these impacts. The RDA funding sought will enable the construction of the trail network. Whilst the funding is sought for the development of the Blue Tier project only, the other trail developments may not occur without the funding.

The impact is shown for:

1) During the 30 month construction period of the trail
2) During the operation of the trail in 2018.

Assessment Overview

This assessment determines the impact of increased visitation to Tasmania because of the presence of a mountain bike trail network in North East Tasmania. More specifically it includes the development of three trails by 2016 in the region.

It is important to note that the visitation impact of the trails cannot be calculated from simply the number of visitors who use the trails. That approach is incorrect as it would:

- Assume all users of the trail travelled to Tasmania purely due to the trails. Rather, a number of visitors who participate in mountain biking may have visited the region regardless to whether or not the new trails existed,
- Ignore the broader impact that the trails have on Tasmania such as increased profile,
- Ignore non-mountain bikers who travel to the region as companions to the mountain-bikers using the trails.

Instead the impact of the trail development has been calculated as the total additional visitors that will come to the region because of the presence of the network of trails than would have otherwise been the case (i.e. without the trails). The increase in visitation arises from:

1. New visitors to Tasmania (day and overnight) due to the trails, and
2. Existing visitors who extend the duration of their visit to Tasmania due to the trails

Estimated additional visitation to the region as a result of the trails is provided below for the two scenarios:

<table>
<thead>
<tr>
<th>Visitors</th>
<th>Existing visitors that MTB</th>
<th>Intrastate</th>
<th>New visitors</th>
<th>TOTAL</th>
</tr>
</thead>
<tbody>
<tr>
<td>‘With project case’</td>
<td>8,000</td>
<td>9,360</td>
<td>4,000</td>
<td>21,360</td>
</tr>
<tr>
<td>‘Base case’</td>
<td>2,689</td>
<td>3,528</td>
<td>-</td>
<td>6,217</td>
</tr>
<tr>
<td>Additional visitors due to the project</td>
<td>5,311</td>
<td>5,832</td>
<td>4,000</td>
<td>15,143</td>
</tr>
</tbody>
</table>
7.1 Key assumptions

Assumptions have been undertaken to complete this assessment. The key assumptions used in the calculation of the economic impacts of the trail development are provided below:

- Impacts provided after 2018
- Expenditure provided in real terms
- Visitor expenditure per person of interstate visitors is $1,554 per trip (TVS, 2011/12). Average spend per night is $190 (TVS, 2011/12)
- Visitor expenditure per person of international visitors is $3,331 per trip (TVS, 2011/12). Average spend per night is $94 (TVS, 2011/12)
- Visitor expenditure per person for intrastate visitors is $121 per night and $97 per day (TVS, 2011/12)
- The expenditure habits of the mountain bikers is representative of average expenditure by tourists in the region
- ‘Existing Visitors’ to Tasmania that go mountain biking on the trail stay on average an additional 1.5 days due to the new trail developments
- Every dollar spent by tourists in Tasmania creates a further $0.91 in indirect expenditure (Tourism Research Australia, 2010) i.e. an indirect tourism multiplier of 1.91 has been used.
- Every $1 million of direct tourism expenditure supports 11.4 FTE jobs (Tourism Research Australia, 2010) i.e. an employment multiplier of 11.4 has been applied.
- Intrastate mountain-bikers would have spent $55 on other activities (alternative entertainment) had they not gone mountain biking
- Of the Tasmania people using the trail 80% stay on average 1.5 nights in Northern Tasmania and the other 20% are day visitors only.

7.2 Construction Impacts

The $4.5 million forecast to be spent (excludes $300K marketing budget) to build the new trails over three years will provide a significant economic boost during the period of construction to the region.

It is estimated that 7.2 Full Time Equivalent (FTE) positions would be supported during the period of construction. This is assuming the construction period is 30 months.

The number of jobs during construction has been calculated as one FTE for every $250,000 of Capex in each year.

7.3 Operational Impacts

Tourism expenditure is defined as any expenditure that has occurred as a result of visitation by tourists to the region. It includes both direct and indirect expenditure. Direct expenditure refers to the immediate expenditure made by tourists i.e. the amount visitors spent in the region.

Indirect expenditure refers to the expenditure that occurs from other industries not in direct contact with tourists. An example of indirect expenditure is the expenditure of a hotel on vegetables from a food supplier in order to produce a meal that will be consumed by a tourist. Indirect expenditure considers the ‘knock-on’ effects of visitor expenditure.
The annual addition expenditure in Tasmania as a result of the development of the trail network in 2018 is provided below. It is shown in nominal terms.

**Additional Expenditure Summary, 2018**

<table>
<thead>
<tr>
<th>Expenditure (nominal)</th>
<th>Direct</th>
<th>Indirect</th>
<th>TOTAL</th>
</tr>
</thead>
<tbody>
<tr>
<td>YEAR 2018</td>
<td>$8.2 million</td>
<td>$7.5 million</td>
<td>$15.7 million</td>
</tr>
</tbody>
</table>

It shows that an additional $15.7 million in expenditure would occur across Tasmania in 2018 if the trail network was developed.

The majority of this expenditure ($12 million) is from the forecasted additional 4000 visitors to Tasmania by 2018 that the trail network is forecast to attract.

### 7.3.1 Employment

The project will also support a number of jobs in Tasmania. Jobs are measured as FTE’s and include both direct and indirect jobs supported by the trail developments.

The number of jobs supported by the project is estimated at 94 FTE’s in 2018.

These jobs will be spread across industries that are both directly and indirectly connected with the visitors to the trails.

### 7.3.2 Investment attraction and regional stimulus

Increased visitation and expenditure in the region as a result of the trail network is also likely to attract further investment within North Tasmania. The trails present an opportunity for entrepreneurs to develop products and services to meet the needs of visiting mountain bikers. This could include transport, merchandise, accommodation or provisioning and guiding services.

There are existing operators in the region that will also stand to benefit considerably from the increase in visitation. They are likely to capitalise on this opportunity and provide additional services, products and experiences for the mountain bike riders.

The increased expenditure will also provide significant stimulus to the regional communities of North Tasmania. There will be increased expenditure particularly within the accommodation and food services industry. An increased length of stay for existing markets and the new Destination MTB markets will improve the occupancy rate of accommodation facilities and may also result in investment in new accommodation infrastructure to meet market needs.

### 7.3.3 Social Impacts

The proposed mountain bike trail developments will provide additional impacts to the communities of North Tasmania than those described as economic. The increase in jobs in the region is a particular benefit that will create employment opportunities both in construction and the ongoing trail maintenance and provision of services for mountain bikers.
The project will also result in upskilling of local workers in track design and maintenance. It is envisaged that local workers will be trained during the construction phases of the project in these skills.

Following construction the jobs created from the project will be primarily in the hospitality, accommodation and food and services industries. It is believed the labour for the newly created jobs would be primarily sourced from within the region. There are significant social benefits from employment opportunities for local workers. This includes reducing the commuting time for workers who previously may have been required to travel to larger centres such as Launceston.

The trails will also provide enhanced lifestyle for the existing communities. It is envisaged that the participation rate in mountain biking in the North will increase with the development of mountain bike specific trails. This has the capacity to increase social morale as well as providing health benefits for the local population.

An increased profile for the North as a result of the trail developments may also contribute towards enhancing regional pride within the local communities. Other regional locations in Australia have successfully increased community participation and spirit through similar tourism-related projects. It could be expected that the project will help to mobilise the local community and provide optimism and energy across the local economy and communities.

An increase in visitation and economic activity in the region is likely to also increase investment and development of service and support industries such as in hospitality. This may give local residents more choice and variety of cafés or restaurants.
8 Conclusion

The success of other mountain bike destinations was examined in the case studies presented within the report. They show that if you get things right, mountain biking can bring both social and economic benefits to communities and regions. Given the natural assets of North East Tasmania there is an opportunity to develop a trail network that similarly will bring significant economic and social benefits to its communities.

An assessment of market demand showed that participation in mountain bike riding is increasing in Australia at a significant rate. Mountain bike riding is becoming more popular and appealing to a broader demographic. Tasmania’s profile as a mountain biking destination is increasing and there is further scope for more trails and mountain biking experiences.

The North East Mountain Bike Trail Network proposal includes the construction of three trails at Hollybank, Cascade Forest and Blue Tier. They will complement the existing trails in the region and provide an additional 93km of track for riders. The trails will provide mountain bike experiences for beginner through to advanced riders. They include a range of trail options from point to point trails, loop trails and even a skills park.

The proposed trail network will attract new visitors to Tasmania, as well as value-adding experiences to existing visitors and providing opportunities for Tasmanians to also bike ride in the North East on quality trails.

The forecast total expenditure in Tasmania in 2018 from the development of the trail network is estimated to be $15.7 million. The majority of this additional expenditure will arise from the trail network attracting new visitors to Tasmania (i.e. those that otherwise would not have come). This market segment is described as ‘Destination Mountain Bikers’ and their preferences and behavior are described in detail within the report.

It is also estimated that the increase in expenditure as a result of the development of the trail network will support an additional 94 jobs in Tasmania. This includes employment directly related to the management and operation of the trail as well as indirect employment generated in the hospitality, retail and accommodation sectors.

The creation of local job opportunities, along with increased expenditure in the local region, will have a significant impact on the communities located in proximity to the trail network. It will increase investment in the region and provide optimism for local businesses and industry. It is also likely to increase community pride and community participation of local residents in the region.
9 Recommendations

The following recommendations are a combination of observations from the project and important next steps to consider that will ensure the project’s success.

1. Pursue opportunities for funding support for the project
2. Stage the development of the trails to focus resources
3. Ensure the trail development accessible to a broad mountain bike market (e.g. beginner to intermediate trails)
4. Ensure that the concept proposed translates onto the ground, especially with respect to gradients. Get the right people to design and build the trails.
5. Ensure resources are dedicated to planning, coordinating and facilitating business development and the trail experience. Key areas include:
   - Communicating the business opportunities within the region
   - Developing information packages to help business cater to bikers
   - Focusing initially on expanding the capacity of existing business
   - Providing mentoring services to businesses
   - Assisting with packaging experiences for visitors
6. Prepare a Marketing Strategy and Action Plan. As an interim step a small piece of work could demonstrate how the market will be targeted and what has been successful elsewhere.
10 Appendix

Tasmania Mountain Bike Focus Groups

Iconic & Emerging Trails & Destinations Table

Melrose, South Australia. Case Study

Whistler, Canada. Case Study

Rotorua, New Zealand. Case Study

Mt Buller, Victoria. Case Study

Bike Friendly Initiatives – Whistler Accommodation Listings

IMBA Checklist - What mountain bikers want.

Visit Scotland – Cyclists Welcome Program
10.1 Tasmania Mountain Biker Focus Groups & Interviews

TRC Tourism as part of this project held focus group discussions with local bike riders through clubs to test the proposed four development concepts in the local and intrastate markets. Focus groups were held in Devonport on 24 May 2012 with members and friends of the Cradle Coast MTB Club, in Hobart with a member of the Dirt Devils (Hobart MTB Club) and also with riders at the Coaster MTB Challenge on the North-South Trail in Hobart on 27 May 2012 and in Launceston with local mountain bikers on the 2 June 2012.

The following key themes and messages emerged:

- In general the riders thought the concept sounded great, although there were a small contingent (predominantly downhill riders) that are looking for very technical and challenging trails. Other riders did not mind “mellow” trails, with some technical features.
- Many riders believe a well-built blue trail is very manageable for a beginner/intermediate rider at slower speeds and challenging/rewarding for an advanced/expert rider at higher speeds.
- Good consistent gradients for ascents/climbs was identified as important by most riders. Trails designed as loops were also preferred over point to point rides because of the transportation logistics involved.
- Some bikers thought the trails needed to offer something different to their local trails to motivate them to visit.
- Signage is very important, as it is currently almost non-existent in the North. The available of a good map is also key and could be sold with proceeds going to the trails maintenance (e.g. Rotorua map).
- Most agreed that 10-15km of trail would be enough to motivate them to visit, quality not quantity is the key, “just needs to be done right”. Others said 20-30km, or enough for two different rides in a weekend would be preferable and motivate them for repeat visits.
- In terms of the development, some riders favoured a focus on one central location, rather than four dispersed areas. Some riders thought the trails needed to be close to civilisation and amenities. Good signage and bike friendly accommodation were also mentioned.

Most mountain bikers thought that they would consider North Tasmania trails as an alternative to an interstate (e.g. Mt Buller) mountain bike trip or New Zealand trip. Mountain bikers outside the North thought that they would be likely to visit 1-4 times annually, possibly more if the trails were really good.
## Iconic & Emerging Trails & Destinations Table

<table>
<thead>
<tr>
<th>MTB Destination and/or Trail</th>
<th>The Product</th>
<th>Visitor Market</th>
<th>Economic Impact data</th>
<th>Community Engagement</th>
<th>Business development programme</th>
<th>Maintenance</th>
<th>Events</th>
<th>Other comments</th>
</tr>
</thead>
<tbody>
<tr>
<td>Forrest, VIC</td>
<td>60km single track network design around the town and easily accessible by bike</td>
<td>Local and Domestic</td>
<td>n/a</td>
<td>State Government (DSE) driven following collapse of logging industry with local input</td>
<td>Organic growth of business following trails</td>
<td>TBD</td>
<td>Regular events</td>
<td>Last mill closed in 2003, tourism the new focus with MTB</td>
</tr>
<tr>
<td>Melrose, SA</td>
<td>75km single track network design around the town Trails started through federally funded Green Corps project in 2005</td>
<td>Local and Domestic</td>
<td>n/a</td>
<td>Now driven by local Bike Shop with government support</td>
<td>Development led by local business (Bike Shop)</td>
<td>Bike shop has built a further 20km. supported by Office for Recreation and Sport, Bicycle SA, Southern Flinders Ranges Development Board and Greening Australia</td>
<td>Melrose Fat Tyre Festival 6/18 Hours of Melrose (run by Bike Shop)</td>
<td>Links and expertise from Fruita USA</td>
</tr>
<tr>
<td>You Yangs, VIC</td>
<td>You Yangs Regional Park 50km network of purpose-built tracks</td>
<td>Local and Domestic</td>
<td>n/a</td>
<td>You Yangs MTB Inc</td>
<td>Organic growth of business following trails</td>
<td>You Yangs MTB Inc (YYMI) in conjunction with Parks Victoria and Bicycle Victoria</td>
<td>Regular club events</td>
<td>Fast becoming a Mecca for mountain bikers.</td>
</tr>
<tr>
<td>Mount Stromlo, ACT</td>
<td>Multi-use recreation facility in Stromlo Forest Park</td>
<td>Domestic</td>
<td>over 50,000 riders per year. TDB possibly for events</td>
<td>Trail Support Program to encourage investment</td>
<td>Trail Support Program to encourage investment</td>
<td>Partnership between Canberra businesses, local mountain bike clubs and ACT Government</td>
<td>2009 UCI Mountain Bike World Championships 2010 Solo 24 Hour World Championships</td>
<td>Only 20 minutes from Canberra</td>
</tr>
<tr>
<td>Thredbo/ Jindabyne, NSW</td>
<td>World class lift accessed downhill track A number of cross country trail within National park</td>
<td>Domestic and International</td>
<td>n/a</td>
<td>Resort and local bike shop driven</td>
<td>Initial impetus from Resort with significant follow up by community</td>
<td>Resort and bike shop</td>
<td>Lots of events</td>
<td>Resort model. New 30km shared trail by National Parks</td>
</tr>
<tr>
<td>Mt Buller, VIC</td>
<td>Extensive cross country and mtb specific lift accessed trails Over 44km of stacked loop trails designed and built by Glen Jacobs. Ride from village.</td>
<td>Domestic and International</td>
<td>n/a</td>
<td>Driven by resort owners</td>
<td>Led by resort</td>
<td>Mt Buller and Mt Stirling Alpine Resort Management Board (ARMB) acts in a council-like capacity and contracts builders</td>
<td>Bike Buller MTB Festival and MTBA National Series races</td>
<td>Reports of a 38% increase in summer visitation at the resort</td>
</tr>
</tbody>
</table>

**INTERNATIONAL**

<p>| Whistler, Canada | Extensive 100km + single track network Whistler Bike Park (200km lift accessed trails) IMBA Epics Ride | MTB major travel motivator Large international market 100,000+ mtb visits | Good data CAD22.0m MTB visitor spend | Community driven (WORCA 1,500 members) with Council support | Partnership between Whistler-Blackcomb and local government | WORCA maintain public trails with assistance from local government | Crankworx 8 day festival has played a major role in raising the profile Weekly community rides | Created the lift accessed mtb market Huge variety of experiences |</p>
<table>
<thead>
<tr>
<th>MTB Destination and/or Trail</th>
<th>The Product</th>
<th>Visitor Market</th>
<th>Economic Impact data</th>
<th>Community Engagement</th>
<th>Business development programme</th>
<th>Maintenance</th>
<th>Events</th>
<th>Other comments</th>
</tr>
</thead>
<tbody>
<tr>
<td>Rotorua, New Zealand</td>
<td>Extensive single track network</td>
<td>Strong domestic Australia (direct flights) 100,000 MTB visits</td>
<td>Good data NZD8.5m</td>
<td>Strong community support and engagement</td>
<td>Organic growth of business, substantial local industry</td>
<td>Volunteer/club maintained with assistance from local government</td>
<td>A number of key events Hosted UCI World Championship in 2006</td>
<td>Economic benefits of MTB well documented and known</td>
</tr>
<tr>
<td>Taupo, New Zealand</td>
<td>Extensive single track network W2K Epic Ride</td>
<td>Largely domestic and local. Craters of Moon 35,000 W2K 15,000</td>
<td>None</td>
<td>Local community driven – Bike Taupo</td>
<td>Organic growth of business, mainly bike shops</td>
<td>Volunteer/club maintained with assistance from local government</td>
<td>Has NZ large cycle events (Round Lake)</td>
<td>High walking use on W2K (50/50). MTB tracks great for walking</td>
</tr>
<tr>
<td>Otago Rail Trail, New Zealand</td>
<td>4-5 day 160km rail trail, quality accommodation easily accessible</td>
<td>Largely domestic Australia increasing 15,000 multi day riders</td>
<td>Good data NZD8.1m</td>
<td>Department of Conservation led</td>
<td>Organic growth, substantial investment in accommodation, standards have increased over time</td>
<td>Department of Conservation</td>
<td>n/a</td>
<td>NZ’s most iconic multi-day cycle ride. Off road but not really MTB.</td>
</tr>
<tr>
<td>Heaphy Track, New Zealand</td>
<td>Epic 78km 2 day ride in National Park.</td>
<td>Strong domestic. Open to bikers in winter only as pilot. 2,000 MTB riders</td>
<td>None</td>
<td>Strong community support, as providing winter business opportunities</td>
<td>Business sector driven</td>
<td>In a National Park. Department of Conservation</td>
<td>n/a</td>
<td>Great MTB ride prior to being included in National Park</td>
</tr>
<tr>
<td>7Stanes, Scotland</td>
<td>Seven MTB network hubs</td>
<td>Huge UK draw Some international 222,000 visitors</td>
<td>Good data GBP9.0m</td>
<td>Led by Forestry Commission. Community engaged later</td>
<td>Came after trails built</td>
<td>Forestry Commission</td>
<td>There are events but they haven’t been a key driver</td>
<td>Economic benefits of MTB well documented and known</td>
</tr>
<tr>
<td>Gallup, New Mexico, USA</td>
<td>Trail network</td>
<td>Domestic</td>
<td>None</td>
<td>Community led trail development</td>
<td>Driven by local businesses</td>
<td>Gallup2010Trails group</td>
<td>Developed to attract visitors</td>
<td>Focus initially was on easy to intermediate trails to appeal to the broadest market</td>
</tr>
<tr>
<td>Moab, Utah, USA</td>
<td>MTB Mecca Trail network (100km ++) and numerous iconic trails</td>
<td>Domestic International</td>
<td>USD8.0m from MTB (1996)</td>
<td>Community driven by local bike shop</td>
<td>Organic growth of business, shops, tours and guiding</td>
<td>Bureau of Land Management (BLM)</td>
<td>24 hours of Moab</td>
<td>Moab transitioned from mining to tourism through 1970-80s</td>
</tr>
<tr>
<td>Fruita, Colorado, USA</td>
<td>Single track network, started in 1995 by Over the Edge Sports</td>
<td>Domestic International</td>
<td>USD25.0m to the economy</td>
<td>Community driven by 1 guy with a bike shop</td>
<td>Driven by local bike shop</td>
<td>City of Fruita, Colorado Plateau Mountain Bike Trail Association, Western Colorado Conservation Corps, and Grand Valley Trails Alliance.</td>
<td>Fat Tire Festival (17yrs)</td>
<td>MTB transformed town of 13,000.</td>
</tr>
</tbody>
</table>
Melrose, South Australia – an emerging MTB destination

Background

Bike South Australia was looking for areas to develop more single track, in conjunction with Troy Rerrick (OTE Sports, Fruita, USA) who was contracted to them on mountain bike development. Both the Melrose and the Mawson area were identified as potential areas.

Richard Bruce moved to Melrose in 2006 to manage the Northstar Hotel. In 2008 he met Troy Rerrick and by chance decided to set up OTE Sports Melrose with Troy’s help in a vacant shop in town. Melrose is a small country town with a population of 200, located in the Flinders Ranges approximately 270km north of Adelaide. At the same time the shop was established they also won the contract to build the Melrose trails, which helped keep the business afloat until it was more established.

In 2008 the town was in decline with property values falling. The shop and the development of mountain biking in the area have really turned the town’s economy around.

The Trails

The network started with the concept of building the types of trails that the team at OTE Sports liked to ride. So as their riding has progressed, so has their trail development. The trails continue to evolve and now include features such as berms, small jumps and rollers. Getting the gradient right is also critical so riders also have a good experience on uphill sections and maintenance costs are minimised.

They have realised that easy riding opportunities are very important, as many people just want to enjoy riding off-road and the landscape, but are not keen on riding technical single track. They have also provided riding opportunities for families and children with the development of a rail trail, which has been very popular with users.

A network of ten kilometres is considered a good starting point, however that is not enough to hold riders attention for long and will not encourage repeat visitation. Melrose now has approximately 75km of trails that can keep riders occupied for 1-2 weekends a year, making it a great weekend and overnight destination. Riders are also constantly looking for new trails or new features/sections, so planning and staging of trail development can be important.

The Market

Melrose has a small local ridership with an increasing number of youth and women becoming more interested in riding. Melrose also has regular weekly visits from riders in nearby (within 1 hours drive) towns. Melrose also attracts riders from further afield with the majority from Adelaide, then Victoria, Queensland, NSW followed by Western Australia.
OTE Sports believe the Australia mountain bike market is still maturing and in some respects is quite race orientated. Many of them, particularly racers, do not spend a lot of dollars in communities.

Melrose aims to provide a more accessible riding experience that caters to a broader market segment including novices, families and older riders. It is about fun and the social aspect of biking. Melrose events reflect this focus with festivals as opposed to attracting national mountain bike races. The key Melrose target market is riders over 30 years old who generally have more time and money to spend.

**Trail maintenance**

The current situation is quite dependent on the OTE Shop, largely because of their leading role in creating the trails. There is a mountain bike club in town that is now in charge of maintaining trails, which was set up by the shop, however there is still a lot of crossover between the two entities.

The challenge within the community is to create a feeling of ownership for the trails, while there are usually high levels of enthusiasm for building new trails, this is not replicated for maintaining trails. So while there is acknowledgement that the trails provide benefits for the community, dealing with the ongoing maintenance of trails can still be a challenge.

The South Australian Tourism Commission (SATC) provided the initial grant over three years to the Southern Flinders Ranges Development board for the development of the Melrose trails.

Since the initial funding there has only been limited dollars from the local council. The club and bike shop organise weekly Saturday morning building sessions to try and encourage regular trail maintenance. Recreation and Sport South Australia have encouraged Melrose to bid for grants but to date they have been unsuccessful.

**Management**

The Melrose trail network is located on private land. The land owners are not keen to allow any further trails to be built on their property. There are more opportunities to expand the network at Bartagunyah but the land is located 4km out of town.

Mount Remarkable National Park is located adjacent to the township, however mountain biking is not currently permitted.

Insurance is provided through a mixture of property owners (at Bartagunyah) and through South Australia Recreation and Sport (Melrose).

Sources: Internet research, knowledge of OTE Sports Fruita history and May 2012 interview with Richard Bruce, OTE Sports Melrose.
Whistler, Canada – an iconic MTB destination

Background

Whistler is located in British Columbia on Canada’s west coast. Mountain biking really began to emerge during the 1990s, riding and trail building developed organically, in an unstructured and unplanned manner. Whistler started to gain recognition as a mountain bike destination in the early 2000s. Vancouver was already on the mountain biking radar with the Northshore of Vancouver creating a new genre of riding (e.g. free riding) and trails (e.g. Northshore style). Whistler Blackcomb in the late 1990s began experimenting with lift accessed mountain bike riding on the ski slopes. They invested heavily with little return initially. However, over a relatively short period of time they created a market for ski-lift accessed biking, a new style of trail (e.g. the famous A-line) design and by 2008 were attracting 100,000 biker visits to the park.

At the same time as the resort was building the Bike Park product the Resort Municipality of Whistler was developing other infrastructure such as the paved Valley Trail and Lost Lakes Trails that complemented the parks riding options. The municipality also started to, with the assistance of the Whistler Off Road Cycling Association (WORCA), develop new routes such as Comfortably Numb (photo above) and improve and maintain select trails in the valley.

Over the last decade Whistler has worked hard to develop it’s summer product and mountain biking has been the cornerstone of this. Summer visitation now exceeds winter visits and mountain biking has surpassed golf as the key driver for room nights in the resort over the summer months.

The Trails

Today Whistler offers a complete mountain bike experience, from the paved three metre wide 40km Valley Trail, to the Lost Lake Cross Country trails (photo above) both suitable for families and novices. It also offers all mountain epics like the technically demanding Comfortably Numb (23km), plus the 100km of lift accessed trails in the Whistler Bike Park.

Whistler businesses have also adapted and capitalised on mountain biking and now caters to bikers by providing bike friendly amenities such as bike stands, bike washes, rentals, guiding services, secure storage and holiday packages.

Whistler has not only planned for mountain bike tourism, but also recreation and commuter cycling to ensure that the benefits of cycling infrastructure can also benefit local residents.
The Resort Municipality of Whistler published the Whistler Trail Standards in 2002, which were designed to review, sign, maintain and manage the network of trails that had developed (some illegally) throughout the Whistler Valley. The document was not a “how-to” on building or maintaining trails, but rather a standard by which the trails would be managed.

The Market

The summer market in Whistler has evolved significantly over the last decade. In early 2000 Whistler’s summer visitor numbers exceeded their winter numbers for the first time and the resort now views summer as the growth area as skier visits remain relatively flat. In 2009, Whistler received 814,000 winter visitors and 1,300,000 summer visitors.

Since 2000 mountain biking has contributed significantly to driving summer visitation, some are calling “mountain biking the new golf”. The Whistler Bike Park attracts 63% of riders from outside Canada, with 89% of non-resident riders staying overnight. The average stay is 5 nights and 80% of Bike Park riders were motivated to travel to Whistler for riding.

Trail maintenance

Outside the Whistler Bike Park, managed by Whistler Blackcomb Resort, the trails are maintained by the Resort Municipality of Whistler in partnership with WORCA. WORCA, with over 1,000 members represents over 10% of the town’s permanent population. The trails are maintained with regular volunteer days (well attended) and evenings throughout the season, and by hiring a contractor with member fees and grants. Special grants also enable large scale trail projects with a variety of different partners.

Economic Benefits

The economic benefits for mountain biking in Whistler are driven by the Whistler Bike Park, which contributes C$16.5 million in non-resident expenditures. However, the trails on municipal land in the valley, managed and maintained by the municipality and WORCA contribute an additional C$6.6 million to the local economy.

In addition to the trails, events like Crankworx also serve as a key catalyst for tourism and economic development. The 2006 event attracted 55,000 unique visitors, of whom more than 23,000 travelled solely to attend the festival and added a further C$11.5 million in non-resident expenditures.

Management

Whistler is an excellent example of collaboration when it comes to the management of the trail network. The key players include: Whistler Blackcomb Resort, the Resort Municipality of Whistler, Whistler Off Road Cycling Association (WORCA) and a host of local and regional businesses.

The municipality has taken a leadership role in recognising the value of mountain bike trails and subsequently putting the systems in place to plan for their ongoing maintenance and management.
Whistler Cycling Committee - a cycling committee was established in Whistler to address the biking-related challenges and opportunities faced by the resort. It is comprised of three key working level groups:

1. Trails Planning
2. Tourism & Services
3. Transportation

Plans have been developed for each sector and the groups continue to work on various initiatives to enhance the biking experience for residents and visitors alike. One of the keys to a successful committee is developing a clear and concise Terms of Reference for the participants.

Sources: First hand knowledge of Whistler supplemented with Internet research, Tourism Whistler, Mountain Bike Tourism (Tourism BC, 2008). $1.00 CAD = $1.00 AUD 31/5/12.
Rotorua – New Zealand’s Spiritual Home of MTB

Background

The Whakarewarewa Forest located on the edge of Rotorua township was designated a forest park in 1975. The forest has since become the recreational hub of the community. Numerous groups including walkers, runners, mountain bikers, horse riders, dog walkers, and picnickers now use the forest.

The growing number of events in the forest has significantly increased the cycling visitor numbers to Rotorua. The 2006 UCI World Mountain Bike Championships served as a catalyst and affirmed Rotorua’s reputation as a world-class mountain bike destination. This has also lead to the growth of bike related businesses in the town.

However, Rotorua’s success can also be attributed to the fact that it was already an established tourism destination with a wealth of other activities available to visitors. This gives it a broad appeal to a large market. It is also well located in the centre of the North Island.

The Trails

The trails are compressed into around 50 hectares of forest and cater to everyone - from beginners and family groups right through to the experts. They are generally pretty mellow, but have enough challenge if riders increase their speed to keep expert class riders coming back.

Riders can put together a 2.5 hour ride without any repeated sections, while never getting further than about 2 kms in a straight line from the trailhead. Even when the carpark is full, the mainly one-way system keeps the forest from feeling crowded.

The Market

Mountain biking accounted for 85,000 of the 282,000 recreational visits to the Whakarewarewa Forest in 2007. Just over half of all mountain bikers in the forest are visitors, 48% domestic and 3% international. And over half (54%) of bikers in a recent survey came to Rotorua specifically to go mountain biking.

Marketing - Rotorua also maintains an excellent one stop website that has all the information riders need for a visit to the trails. www.riderotorua.com

Economic Impact

Overall, mountain bike related spending in Rotorua was estimated to be around $7.4 million in 2007. Visitors to the region account for 35% or $2.6 million.
The biking trails in Rotorua have created opportunities for businesses to capitalise on this growing market segment. The town now has seven full service bike shops, three of which also hire bikes, as well as a bike shop located at Whakarewarewa Forest. Several accommodation properties cater predominately to mountain bikers and there are guiding and bike shuttle companies operating on a full time basis.

Southstar Adventures runs a mountain bike shuttle service for bikers in the forest. The business has grown from one bus to three since 2006. The company now has an hourly rider capacity of 180 and undertakes over 20,000 rider trips annually.

**Trail maintenance**

The costs of building and maintaining the Whakarewarewa Forest trails are informally shared by: the Rotorua Mountain Bike Club’s (Inc) volunteer efforts, charitable trust funding to pay contracted part-time trail-builders, the Department of Corrections who organizes Periodic Detention (PD) work crews and Rotorua District Council.

**Management**

The Forest is managed by Kaingaroa Timberlands on Crown Forest Licence land. On July 1, 2009 ownership of the forest was transferred to the Central North Island Iwi Collective (CNIIC). There is a legal right of access for recreational activities but forestry management goes well beyond this to make the Redwoods a great place to ride. The Visitor Centre is managed by the Rotorua District Council.

Mt Buller, Victoria. Case Study

Background

Mountain biking has been happening on Mount Buller since the 1990’s. It started out ad-hoc with no formal trails and the network being developed and expanding year on year, with a particular focus on downhill trails. Over the 2002/2003 summer the trails were closed by resort management (the Council) due to environmental issues being caused by mountain biking in the region.

Talks started around this time about having a formal, directed plan for mountain biking in the area. This was also influenced by the 2020 Strategy for Mount Buller which pushes for the area to be a year round destination. World Trails was employed over 2004 and 2005 to create a master plan for mountain biking in the resort. Trail building began in 2006/2007. This was supported by a grant from Regional Development Victoria. Trail building in the resort is limited to a short season between December and April for environmental reasons.

The Trails

Buller Ski Lifts builds and maintains the downhill trails on the mountain. The resort (Mount Buller) builds and maintains the cross country trails. There is a wide variation of trails in the area, ranging from easy to very difficult and catering for all abilities. The majority of trails are aimed at intermediate riders.

The resort’s strategy for staging trail development was to start with intermediate trails and then build beginner trails followed by harder more technical trails. They have now switched their focus back to easier trails to cater for the beginner/family experience. They aim to have the easier trails as the most accessible/closest to town and the more difficult trails further out, but accessed via the beginner/intermediate trail network.

Their goal was to have enough trails in the region so that they could not all be ridden in one day. Tourists would then have to stay the night and continue riding the next day. They suggest that the tipping point is approximately 30km of trails.

They have also developed a new trail called Copperhead, which they believe is a new type of trail called a “flow down”. It can be ridden on a downhill or cross-country (XC) bike. It is generally suitable for a beginner downhill rider or intermediate XC rider, however riders of all levels can enjoy different features.

The Market

Ten percent of the market is downhill riders. The rest is made up of cross country riders with varying abilities. The biggest proportion of the market is middle age professionals who are looking for an adventure experience (similar to the downhill ski/snowboard market). These types of riders generally fall in the intermediate category.
The resort aims to cater for all visiting tourists and would not invest solely in one area and certainly not only for downhill riding.

Approximately 70% of their market is made up of interstate tourists. Interest is generated predominately by word of mouth. They have experienced an 18.5% increase in visitors this year compared to last year for mountain biking.

**Management**

The resort believes that land managers in Australia need to be proactive in providing managed mountain biking opportunities as mountain bikers are here and they will create their own opportunities if they are not provided for them. Unmanaged networks can create problems for a community as experienced in Mt Buller over the 2002/2003 summer.

The downhill trails do not make enough money on their own to pay for the mountain operation costs. However, the lifts are open for sightseeing in summer and the chairlift access for downhillers ties in well with this. Lift access has to be affordable, which limits the opportunity with downhill mountain biking as the market is simply not big enough.

**Economic benefits**

The economic benefits of mountain biking for the region have not been huge. However, it is helping with the sustainability of the village and has meant that a few businesses, which previously only opened over the winter are now open year round.

The returns are there for private investors but the costs (for cross country tracks, maintenance, marketing, etc) are the responsibility of resort management (the Council). The economic situation has improved slightly over summer since the mountain bike master plan was put in place, with some businesses now reporting days in summer that are as busy as the winter season. The community buy-in has been slow but it is slowly growing.

**Signage**

Signage is very important. It does not need to be fancy, just simple and in the right locations. They are continuously updating their signage by filling in gaps, which users highlight. They also work on the basis that the further out you get in a network the less signage you need as it is assumed that only more experienced riders will use the outer trails.

Sources: Internet research, local knowledge of Mt Buller and June 2012 interview with Lou Perrin, Mt Buller Resort.
## Bike Friendly Initiatives – Whistler Accommodation Listings

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<th>Tuning Station</th>
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IMBA Checklist - What mountain bikers want.

According to IMBA, mountain bikers want experiences that provide:

- connection with nature
- escape from society
- fun and the opportunity to feel the flow of a trail
- challenge that tests the rider’s technical skill
- exercise that strengthens the body and mind
- variety of trails that have their own distinctive personalities
- connections to other trails and routes that create a range of possibilities
- camaraderie between friends and new acquaintances
- a sense of belonging from trails that welcome mountain bikers
- facilities that provide convenience and make the rider’s experience complete.
Visit Scotland – Cyclists Welcome Program

Cyclists and mountain bikers staying in Scotland will benefit from Visit Scotland’s Cyclists Welcome program which aims to ensure that participating accommodation venues offer a range of specified services designed to attract cyclists. Over 1,000 establishments now participate in the program and offer the following in addition to normal services:

For full-service accommodation:

- a separate space available for drying outdoor clothing and footwear so clothes can dry overnight
- a lockable covered shed for bike storage
- details of the nearest bike shop
- a hot drink available on arrival;
- a late evening meal (available until 8 pm) if there are no other restaurants or cafes within one mile; a late night snack offered after 8 pm
- early breakfast option from 7 am, or for very early leavers a tray the night before
- a packed lunch and a filled water bottle, if requested
- a supply of information on local bike routes, local public transport and a weather forecast for visitor reference.

For self-catering accommodation and hostels:

- a separate space available for drying outdoor clothing and footwear so clothes can dry overnight
- a lockable covered shed for bike storage
- details of the nearest bike shop
- information on local bike routes
- a telephone number for weather forecast
- facilities for washing clothes or location of the nearest coin laundry
- details of the establishment’s Ordnance Survey co-ordinates (if outside a village).