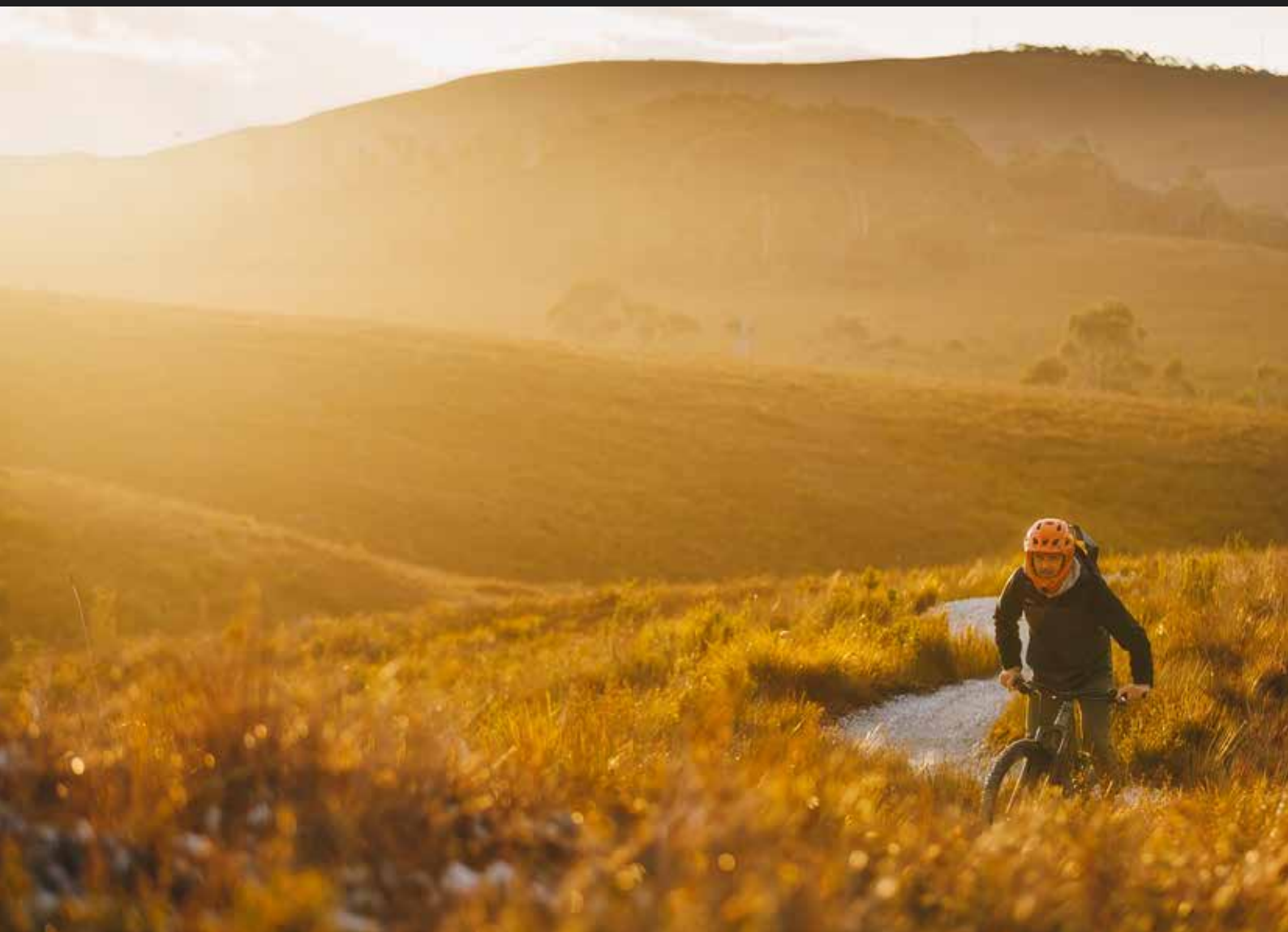


Mountain Bike Tourism Action Plan

Developed by Robert Potter for the Mountain Bike Network – Tasmania

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Executive Summary ↙

Tasmania has established itself as Australia's leading MTB state. This has occurred through the development of successful MTB destinations; Maydena Bike Park, Blue Derby, St Helens and trails on the West Coast.

This success has been achieved through an uncoordinated approach with individual Local Government proponents pursuing development in isolation without reference to a state-wide strategic direction.

Mountain bike visitors account for 5% of interstate and international visitor nights and represent 3% of visitors to Tasmania. The total value of MTB tourism to Tasmania is unknown. Most MTB visitors to Tasmania are from interstate with fewer international visitors. Increasing interstate and international MTB visitor numbers is a significant opportunity for Tasmania with large populations of riders in the northern hemisphere and across Asia.

The competitive landscape is changing quickly in part due to the potential that Tasmanian MTB destinations have demonstrated to provide economic benefits for regional communities. There are over 500km of trail destination developments currently under or close to construction in Victoria and New South Wales, the two strongest States for visitation for Tasmania. These destinations have had the opportunity to observe and address in their planning the attributes of Tasmanian destinations that have contributed to their success and are significantly closer to large visitor markets.

The last state-wide planning for MTB was the Tasmanian Mountain Bike Plan (TMTBP) which was developed in 2009 and though it preceded all of the destination developments that now exist, it established a clear direction for MTB trail development to attend to recreational and visitor demand.

The TMTBP established a framework through which MTB development could be considered in relation to its purpose and the users it would attract. It also proposed a vision for mountain biking in Tasmania. This vision has been adapted to articulate the direction of MTB tourism in Tasmania (independent of recreational trails):

Tasmania will provide a sustainable, diverse range of unique mountain bike experiences that support communities and compel visitors to enjoy Tasmanian environments through trails.

MTB trail supply in Tasmania is strong and provides visitors with access to many iconic Tasmanian environments through a range of trail styles. There is opportunity to maintain and enhance the appeal of Tasmania as a MTB destination by providing visitors access to further iconic Tasmanian environments and landscapes through trails as well as developing trail styles that are not offered or of which there is limited supply.

Most trail development, with the notable exception of Maydena Bike Park has been undertaken by Councils with primarily Federal funding.

The model used to resource the operation and maintenance of trails varies, though is most often through Council resources with the rationale that there is a net positive community or regional benefit related to visitation of the trails. Revenue that can then be applied to the maintenance of trails is generated through a range of mechanisms that include operator license and rider fees, trail sponsorship, the sale of branded merchandise and booking levies. Investigating alternative business models to ensure the economic sustainability of trails should occur, this may include implementing fees, wider application of license fees, leasing of publicly funded infrastructure,

supporting private development on private-freehold or enabling further appropriate private development on public land through the Office of Co-Ordinator General EOI process.

Maintaining community support for ongoing public investment in trails will require demonstration of their value through research to quantify visitation and the expenditure of visitors. This work should be undertaken as a priority.

The demand on emergency services created by increased participation and MTB visitation is widely acknowledged. There are opportunities to reduce this burden through changes to trail design and construction, implementing recording and risk management protocols and establishing dialogue between Emergency Services and trail proponents and managers.

To improve decision making, this Action Plan introduces a Feasibility Assessment Framework and Trail Classification System developed to reflect the outcomes of consultation, research and observation. The Feasibility Assessment Framework a coordinated state-wide approach to MTB product development that is aligned with the aspirations and interests of Tasmanian communities and that will enhance our market position.

The MTB Action Plan has been developed to reflect the broader strategic context of Tasmania's 2030 Visitor Economy Strategy. This Strategy forecasts future growth in visitation and commits to proactively managing this growth to protect and enhance Tasmania's Brand, environment and community values.

Recommendations and Actions ↙

The following recommendations and actions are based on the outcomes of engagement with the project Working Group, observation, analysis of available data and arguments provided throughout the Plan.

RECOMMENDATION/ACTION	Priority
DATA AND RESEARCH	
Measure the economic benefit attributable to MTB tourism in Tasmania.	High
Research the types of experiences that motivate visiting riders to travel to Tasmania and what experiences would add duration, yield, frequency to their visits.	High
Employ broader use of trail counters and in conjunction with the TCS and DPFEM improve our understanding of how demand, use and rider safety is influenced by trail attributes.	High
Work with business operators through the MTBN to understand visitors through sharing of non-proprietary information.	Medium
INFRASTRUCTURE	
Reshape/mitigate problematic features across existing trails as an outcome of data provided by and discussion with DPFEM.	High
Consolidate BlueDerby's position by resourcing further trail development and renewal with a focus on opportunities for safe rider progression within the network through construction of green, and blue jump and freeride trails with good emergency access.	High
Support both trail and utility infrastructure developments within Maydena to ensure the town can accommodate increases in visitation and population size attributable to MBP and positioning as a gateway town to the TWHAA.	High
Investigate developing another extended wilderness experience in the North East region ideally connecting and activating other towns/economic opportunities (Mount Maurice, Mount Scott, Mt Stronach, Mount Victoria).	Moderate
Investigate opportunities for development of a coastal MTB experience within appropriate tenure and values setting that would add diversity and appeal to the Tasmanian MTB offering.	Moderate
Investigate the development of MTB trail that provides visitors with experience of dramatic dolerite geology for which Tasmania is renowned acknowledging that this would involve significant cost and trail-building challenges.	Moderate
Investigate the development of MTB tourism product/trails in the dry woody grassland, and the modified pastoral landscapes of the Midlands and East Coast.	Moderate
Support development of more introductory/easy trails and more difficult trails to support the large volume of intermediate trails.	Moderate
Investigate development of a modular, multi-day trail experience connecting small towns with more engaging MTB single track duplicating some sections. May be on the West/North-West Coast or North-East building on existing trails.	Low
Develop more direct climbing options across destinations to increase appeal, attend to increasing e-bike use and remove riders from shuttle roads.	Low

RISK MANAGEMENT AND SAFETY	
Request Ambulance Tas/Police SAR record and share with trail managers, accurate incident location data.	High
Establish a state-wide protocol where an incident of certain seriousness or number of incidents in the same location triggers an accepted process to assess that trail/feature and removal of unnecessary hazards where possible. May be modelled on MBP approach.	High
Develop a protocol where for jump trails the network context is considered and development is staged starting with easier/Green trails then progressing through the TDR's to more difficult or extreme.	High
Develop or adopt guidelines for locating high-risk trails close to access and minimising risks through design and construction.	High
Require development proponents to engage with DPFEM at proposal stage.	High
Support the adoption of a state-wide incident management approach for destinations consistent with that used in St Helens/BODC.	Moderate
Establish an advisory group at State level (this can be an existing body) to provide oversight and accountability for risk management across MTB infrastructure.	Low

RECOMMENDATION/ACTION	Priority
MARKETING AND COMMUNICATION	
Using the TCS develop market facing labels or descriptions that allow clear and consistent communication to visitors about the experience a trail provides.	High
Develop an information package defining the differences between different destinations. Marketing efforts should seek to get the right riders on the right trails in the right place.	High
Support collaborative marketing initiatives and actively pursue opportunities to host events, product launches and content development.	High
Focus marketing resources on the trails and networks that are or are likely to attract riders from outside the state to avoid damage to the Tasmanian MTB brand by directing visitors to lesser standard experiences.	High
Improve co-marketing and integrated product development combining MTB with other complimentary experiences and industries like gastronomy and nature-based tourism experiences.	Medium
Work with industry and key personalities to create a safety campaign including film and information package detailing how to stay safe on the trails including remote trail requirements and risks.	Low
POLICY AND GOVERNANCE	
Work with PWS and other authorities to establish a standard development process, similar to that presented in IMBA's <i>Mountain Bike Trail Development. Guidelines for Successfully Managing the Process</i> that guides proponents through the process of feasibility assessment (using the FAF), engagement and a clearly defined approvals and assessments process prior to pursuing funding applications.	High
Investigate, develop, and adopt alternative business models to ensure economic sustainability of public, currently free-to-use networks.	High
Work with the State/STT to reach a position that enables further development in existing destinations requiring access to PTPZL. This will be required for BlueDerby to develop beyond the existing trail footprint.	High
Improve the licensing approach for shuttle operators to ensure visitor experience and industry sustainability.	Moderate
Develop standard procurement template using the TCS.	Moderate
Develop training and accreditation pathways for MTB guides and operators that provide an assurance of service standards and visitor experience . Issuing of the existing Nature Based Tourism License, administered by the PWS, should require completion of training programs and accreditation for the activity being undertaken and permitted.	Low

Purpose of this Action Plan ↙

The purpose of this Action Plan is to provide high-level recommendations and actions to move from our current position to a future state defined by the vision for Tasmanian MTB tourism.

The document is structured as follows:

What is the current state of MTB tourism in Tasmania?

- Existing product supply – what sort of experiences are we offering? How can we describe what we have?
- Trail Classification Framework – how can we better understand and describe what it is we have and what we can develop?
- Research and data describing visitation and demand – what do we know about who is visiting Tasmania to ride MTB's now? What do MTB visitors to Tasmania want to experience?
- Summary of Engagement – what is the experience of those organisations involved in the provision of our MTB tourism product?
- PESTEL Analysis – what changes can we expect in the future and what are our unique opportunities and challenges?

Where would we like to go?

- Vision for MTB tourism in Tasmania – what do we want to achieve?
- Competitive Landscape – what is national supply of MTB tourism products and how is it changing?

How do we get there?

- Existing Strategies – what strategies are in place guiding the development of MTB tourism product?
- Feasibility Assessment Framework – how can we make better decisions around resourcing MTB product development?
- Recommendations – what do we need to do to realise the vision for Tasmanian MTB tourism?

What is the
Current State
of MTB Tourism
in Tasmania?

Existing Product Supply ↙

Summary

This document is concerned primarily with MTB trail infrastructure as ultimately the quality of our MTB experiences is determined by the trails. MTB businesses that value-add and are based upon our trail infrastructure will be discussed briefly and provide a useful insight into the economic opportunities and direct economic benefits of MTB development.

Consideration is only given to those areas (trails and networks) developed explicitly to attract visiting riders rather than to meet existing local recreational demand, generally these are labelled and promoted as destinations though through the application of the trail hierarchy, it is clear some of these are not functioning as destinations.

Tasmania currently offers six areas of trails developed to attract visitors:

- BlueDerby
- George Town Mountain Bike Trails
- Maydena Bike Park
- St Helens Mountain Bike Trails
- Wild Mersey
- West Coast MTB

Aside from Maydena Bike Park (MBP) all aspiring destinations have been developed and are managed by Councils on primarily public land with small areas of private land included in some networks. They are also all free to access. Most have been funded through a combination of Council contribution, State funding with a strong majority of Federal grant funding. Differing from other destinations, BlueDerby has recently established the BlueDerby Foundation whose mission is to 'ensure BlueDerby remains Australia's best MTB destination' though the allocation of roles and decision making related to the network is unclear and Dorset Council appear to remain responsible for the management, maintenance and development of trail infrastructure.

There are a full range of trail and network styles including common stacked loop configurations, some closed loop networks where a single climb or shuttle accesses multiple descents and some longer distance, wilderness/back-country trails. There is some duplication of trail style and network configurations reducing the uniqueness of some trail areas and establishing competition between them rather than complimenting each other. There is evidence that longer distance, wilderness trails play a key role in motivating visitors to travel to Tasmania and further development of this kind of trail in other unique environments should be considered.

Trails have been developed across a range of uniquely Tasmanian environments though there are still opportunity to provide visitors access to other environments where trails are not currently located.

Resourcing the ongoing maintenance required to ensure visitor experience and safety is a concern for most trail areas, with this cost being borne primarily by Councils and grant funding sought for specific projects. Several Councils have initiated trail sponsorship programs, where MTB and other business contribute to costs and other fund raising initiatives have been trialled or implemented including booking platform commissions, merchandise sales and even increased waste levies.

BlueDerby and St Helens are the only networks that allow public shuttling, Georgetown, and West Coast MTB at Mount Owen restrict shuttle access to licensed operators while MBP operates its own shuttle service. Wild Mersey does not offer any shuttle opportunities. The proliferation of shuttle operators in BlueDerby has reduced the viability of existing businesses and should be addressed through an equitable process and implementing license and/per rider fees on shuttle operators to ensure proportional contribution to trail maintenance/development.

The destinations that offer unique trail experiences that cannot be duplicated or exceeded in other parts of Australia will remain competitive. The most reliable way to do this is to locate trails in iconic Tasmanian environments and provide visitors experience of these environments through engaging trails. Maydena Bike Park with its setting and elevation opportunity, the trails of the West Coast providing an above-the-tree-line experience unlike any trails in Australia and the Blue Tier trail and Bay of Fires trail of BlueDerby and St Helens respectively that afford riders the opportunity to undertake a journey through Tasmanian temperate rainforest and in the case of the Bay of Fires Trail finish their ride in the Bay of Fires; an iconic destination in itself.

Tasmanian MTB Destinations

Blue Derby

Derby is the most successful mountain bike destination in Tasmania and by some metrics, Australia. It arose as one component of The North-East Mountain Bike Project, a regional trail development project proposed by Northern Tasmanian Development Corporation and distributed across three municipalities: Launceston, Dorset and Break O'Day.

Derby visitation is regularly suggested to be 30,000 riders per year (Common Ground Trails, 2018) and indeed that figure has been consistent since the networks commissioning despite a visible increase in visitation and business activity over that period. The source of these figures is not understood, though anecdotal reports offered by numerous business operators within the town suggest intra and interstate visitation accounts for most riders with international visitors less common. Visit Northern Tasmania was recently cited in The Australian (2021) indicating that in 2019... 69,314 people travelled from the mainland to go mountain biking in Derby" though it is unclear where this figure comes from.

Due to the tenacity of Dorset Council and influence of key tourism operators, BlueDerby has continued to add to its offering and attract ongoing funding to adapting the network to suit emerging trends in MTB and as their understanding of the destination market has developed.

The North-East was the focus of this project due to the numerous small towns proximate to large areas of Public Land of suitable tenure that offered geological and topographic conditions within high-quality natural environments that could support internationally relevant riding experiences.

The key physical attributes of Derby that have enabled the development of quality trail experiences are its geology, elevation opportunity, natural environment and interface between the town and trails. Indeed, this development occurred in the North-East rather than closer to the larger population centre of Launceston because of these factors and despite all key proponents being Launceston-based.

Derby, like many smaller Tasmanian towns and particularly those with mining or forestry histories is also surrounded by land of suitable tenure to enable the development of trails that are accessible, by bike from the range of amenities the town offers.

The geology of the area surrounding Derby within which the trails fall is granite. From a MTB perspective granite produces soils that are pleasant to ride across a range of moisture/climatic conditions. The rock itself weathers into shapes that are very rideable, with bedrock slabs being interesting technical features and any rock left in or included in trail treads presenting rounded, gentler edges relative to other rock forms. The natural environment plays a strong role in attracting visitors to Derby with the trails accessing sub-alpine environments and areas of mature myrtle forest on the blue tier to temperate rainforest and eucalypt forests around Derby.

Most trails within the network are blue square intermediate with equal numbers of easy and difficult trails.

Derby offers almost a complete range of MTB trail experiences that range from an asphalt pump track to a point-to-point wilderness ride in the form of the Blue Tier. It offers a range of shuttle products mostly accessed by Cascade Road, where riders can choose from a range of trail styles from gently traversing machine-built flow-trail to the hand-built, extreme technical difficulty trails developed for the EWS. One trail named Air-Ya-Garn, attracts more traffic than all other options and accounts for many injuries and medical evacuations.

This is indicative of both demonstrated demand for jump trails and management of rider safety, both through trail design and construction but importantly by ensuring that there are opportunities for riders without the skill and experience required to safely navigate a difficult jump trail to progress safely on trails of lesser difficulty and consequence. It is also important to note that Air-Ya-Garn is one of the few trails accessible from the Black Stump shuttle that does not require riders to climb higher from the shuttle point.

BlueDerby has developed a trail of lesser technical difficulty to address the gap in jump trails that exists and is demonstrated by the popularity and injuries associated with Air-Ya-Garn though is constrained by the limited area available. The need for further opportunities for riders to safely develop the skills to approach Air-Ya-Garn remains.

Derby has received significant international attention through hosting of the Enduro World Series, which is an international, competitive event that reflects a style of riding that most riders in more mature mountain bike cultures and markets seek; interesting, technical descents that are accessible by climbing trails, access roads, shuttles (or chairlifts) where available or where the elevation range requires it.

The hosting of the EWS and development of shuttle-able descents reflected a significant change in orientation from the original concept of a stacked-loop network toward shuttle-able and closed-loop network configuration. This change is reflective of the maturation of mountain bike culture away from competitive cross-country events and toward experience-oriented trail riding based around engaging descents and acknowledgement of that by those responsible for the network design.





Wild Mersey

Wild Mersey is a regional destination of dispersed trail networks, across three towns connected by single-track and fire-trail and roads. It is composed of a series of stacked loop or closed loop networks distributed across the area between Latrobe and Sheffield, with a trailhead and pump track at Railton.

The trail masterplan and concepts were developed by World Trail in partnership with recreation planning firm TRC for Kentish and Latrobe Councils.

Wild Mersey offers a wide range of trail styles from Rail-Trail-style link trails between the networks and towns, short wilderness style loops accessing elevation, views or points of interest and trail dynamic focused, flow and jump trails.

There are no shuttle or lift accessed options across the Wild Mersey network.

There is an asphalt pump track associated with the Wild Mersey development located in the town of Railton, with no skills trails beyond the range of jump trails of different technical difficulty ratings which do allow some opportunity for safe skill development and rider progression.

Wild Mersey reflects confusion at the concept development stage around the different market segments that compose not only the MTB destination market but cycle tourism generally. Marketing content continues to promote the opportunity to ride between the trail networks and even off the Spirit of Tasmania which fails to reflect the way that different user groups will and do interact with the trail networks.

Riders interested in the longer distance link trails are not typically interested in the destination trail networks. Those interested in the feature laden descending trails would typically (and in other locations have access to) shuttle multiple laps and those undertaking the longer distance trail loops are not as likely to be interested or at that stage of a ride, be safely able to navigate the range of high consequence features some of those trails involve in relatively remote situations.

Despite its confused identity, Wild Mersey does offer many high-quality trail experiences and is best characterized as a series of excellent local trail networks that have undoubtedly increased participation in MTB on the North-West coast and will provide the demonstrated economic and social benefits associated with active recreation.

George Town MTB Trails

The George Town Mountain Bike Trails are two separate trail networks to the South-East of George Town.

The Mount George Trails were commissioned in 2021 and offers just under 16 kilometres of trails across a range of technical difficulty ratings and trail styles. The trails are serviced by a series of climbs and sealed shuttle road that provide access to the approximately 120 metre elevation range available.

The network is best described as a closed loop system with arterial climbs accessing a greater number of descending trail options. Consistent with this, the network is arranged around a series of trail nodes; one adjacent to the shuttle drop off and another - East Peak providing access to most of the trail volume on the hill.

There are two climbing routes that provide access to the descending trails; Keystone that duplicates the shuttle road and a shorter climb, Sticky Beak that joins to Roca Del Vista that provides both a more direct access to the East Peak trails or the opportunity for beginner riders to create a very short loop over a small elevation range.

The multiple descending options cleverly increase the amount of riding required for visitors to experience the complete network beyond the 16 kilometres of trail though for many riders used to shuttling, adding traversing or climbing to access most of these trails is unappealing.

The Tippoogoree Hills network is nearly completed with the final trails and completed shuttle road expected to open early in 2024. This area accommodates a greater trail volume of approximately 42 kilometres (with designs approved for a further 15 kilometres) and accesses a greater elevation range of over 300 metres. Many of these trails are shuttle accessible via the restricted access shuttle-road and licensed shuttle operator.

Both George Town networks are built on soils derived from dolerite and present the unique opportunities and challenges attributable to that material and described elsewhere in this document.

The trail style across the Mount George trails is varied though to some degree defined by the local geology. The trails are very rocky and will a high level of maintenance or the application of an imported trail tread more widely to maintain the experience they offer long term.

Usage of Mount George has greatly reduced since the opening of the Tippoogoree Hills trails, due to the failure to differentiate between the two areas and the Tippoogoree Hills network offering better versions of the same trail experiences available at Mount George. This is an important demonstration of the risks of duplicating the same trail experiences.

George Town has recently developed a pump track in an excellent location for local use at one end of the main street, though it is remote from both of the trail networks and does not contribute to the ability of either trail head to entertain groups of different ages, abilities and motivations.

There are no plans to develop a skills area or dedicated skills trails within or associated with the George Town networks.





St Helens MTB Trails

The St Helens MTB Trails are made up of the Bay of Fires Trail and the Loila Tier/Flagstaff trails.

The Bay of Fires Trail is a 42km point to point, wilderness style trail that departs the Blue Tier and delivers riders to the Bay of Fires at Swimcart Beach. The trail shares an initial section with the Blue Tier trail in interesting sub-alpine forest. Both the start and finish of the trail is distant to the towns/destinations of St Helens and Derby. The popularity of both the Blue Tier and Bay of Fires trails despite their remote location both demonstrates the potential of further wilderness-trails and the reduced importance of ride-in/out experiences that unquestionably enhance network based trail experiences like BlueDerby.

Accessed from the trail network at Loila Tier is the Dreaming Pools trail which while it is a loop trail in a network context, it's distance places it more within the categories of wilderness or back-country trail rather than another stacked loop option. In addition to the trail dynamic, the key experience of the Dreaming Pools trail is provided by following Constable Creek and the waterfalls and pools it contains.

The Loila Tier/Flagstaff networks are connected to the township of St Helens by the Town Link, a shared use trail that follows Georges Bay at the St Helens end before passing through primarily dry Eucalypt forest as it ascends gently to the MTB network. The Town Link is a great example of infrastructure while developed to service a MTB visitor oriented development also provides the non-MTB local community improved recreational opportunities.

The network is composed of a stacked-loop network and several shuttle accessed descents that span an elevation range of approximately 250m. The geology across the network varies but is primarily a combination of granite and mudstone that both provide a strong riding experience in the wet, but can increase trail difficulty in the dry. The dominant vegetation type is dry Eucalypt forest with some variation depending on aspect and local topography.

Anecdotally, St Helens enjoys strongest visitation during holiday periods where the trails combine with the other recreational opportunities of the town to offer a strong destination experience.

Maydena Bike Park

MBP is distinct from all the other Tasmanian destinations as it is privately developed and owned as well as being gravity oriented and is located within the recreation zone of the Tasmanian Wilderness World Heritage Area.

The Park is located about an hour from Hobart, close to Mount Field National Park, one of the most visited NP's in Tasmania which as the more beginner product is developed will provide a good flow of potential visitors that may be enticed to MTB. The Park offers a full-range of supporting products and experiences including dining, bike-hire, instruction and guiding.

The trails cover an elevation range of 820 vertical metres which is unmatched in Australia and positions it as one of the best locations and networks for gravity riding in the southern hemisphere.

The environment within which the Park sits includes low-alpine heath at the highest elevations, eucalypt forest, myrtle forest and areas of rainforest. Lower elevations are former plantations which is well suited to higher impact/ footprint jump trails which also places these inevitably higher risk trails closer to access and services.

The *Tourism Master Plan for the Tasmanian Wilderness World Heritage Area* identifies Maydena as a gateway town to the TWWHA with proposed visitor service zone within the MBP lease area. Increased visitation attributable to the Bike Park and the TWWHA will require improvement of the utilities servicing the town and further development of accommodation and hospitality products.

MBP offers trails across the full range of technical difficulties and a very broad range of trail styles from beginner flow trails, jump trails of all difficulty levels enabling safe progression through to advanced/pro-level technical trails.

A further network of trails is proposed around the township of Maydena that while not part of the Park will contribute to the appeal of MBP for some visitors and potential residents. The trails will be located at lower elevation and across different geology types that will increase riding options through winter and wet periods. The proposed trails include a range of trail riding opportunities and easy trails, accessing natural points of interest that will complement the offering of the Park, improve options for non-MTB riders and provide complimentary activities for visitors to MBP.

The unique attributes and offering of MBP will ensure its sustainability as a destination and their visitation data supports this showing strong interstate and international visitation relative to other Tasmanian destinations.

GATEWAY TOWNS Role. These are towns uniquely based on the edge of the TWWHA which are existing gateways to experiences in the TWWHA. These towns present an opportunity to focus higher impact uses and developments supporting high levels of visitation without affecting the values of the TWWHA. This includes visitor accommodation, staffing accommodation, tour operation bases, retail and food services.





West Coast MTB

West Coast MTB is made up of two recently developed trail networks, Silver City near Zeehan and Mount Owen in Queenstown.

Silver City is a conventional stacked loop network originating close to, but not likely to be accessed from town with most riders electing to use the trailhead parking area rather than ride from accommodation.

The network includes a green loop that ascends Oonah Hill, taking riders through Tea Tree Forest into the button grass plains in which the rest of the network is located. A blue loop of 13 kilometres takes riders further into the landscape with a black diamond/advanced loop ascending and descending the ridgeline between Mount Heemskirk and Mount Agnew, the two peaks that dominate the topography of the area. Only the green/easy descent is able to be shuttle in the Silver City network though this option is not promoted and it is not serviced by any commercial operators.

Mount Owen involves three shuttle accessed descents, Waterfall, The Long Spur and North Owen Descent with a further double black diamond/extreme

trail – Natural Selection being shuttle assisted and requiring riders to ascend a further 160 metres elevation beyond the shuttle drop-off. Like the button grass landscapes of Silver City, the Mount Owen trails provide riders almost constant views of the rest of the West Coast range the Franklin-Gordon Wild Rivers NP. The network also includes a green/easy and blue/intermediate loops closer to Queenstown that riders can access from the network trailhead in the outskirts of the town.

West Coast MTB also promotes three stand-alone trails they label as ‘the rest’. Two of these are non-MTB specific trails that visiting riders can ride to access points of interest Montezum Falls and Ocean Beach. Sterling Valley, a historic route now designated as a black diamond/advanced MTB trail is located within myrtle/rainforest which adds diversity to the West Coast trail offering but is not easy for visitors to locate and navigate.

The geological, topographical and climatic conditions of the West Coast make it difficult to develop trails of lower technical difficulty and for this reason most trails across the West Coast are of intermediate and above technical

difficulty. Due to the landscapes in which they are located the trails of West Coast MTB are unique in Australia and unable to be replicated elsewhere, though further trail volume may be required to increase visitation and mitigate the time and distance involved in accessing the West Coast.



MTB tourism operators

This document focusses primarily on mountain bike trails these are ultimately the product that visitors are motivated to travel to experience and upon which most other MTB tourism businesses rely. There are however a range of businesses utilising our trails including; transport and shuttle operators, tour, guiding and skills instruction providers, bike shops and bike rental that either facilitate or enhance visitor experience.

Many hospitality businesses have been established to support increased visitation created by MTB trails; particularly in Derby, and these are essential for positive visitor experiences.

These will not be discussed specifically here as they are not MTB specific and in other areas it is difficult to distinguish between those that are sustained by non-MTB visitation. Similarly, there are skills instruction businesses and those not clearly associated with destinations or offered as part of a larger tourism product will not be included due to the cross-over with local recreational activity.

There are an increasing number of interstate MTB tour operators bringing visitors to Tasmania, both independently and in cooperation with local operators.

Most MTB tourism operators are engaged in rider transport and shuttling

with a greater intensity of this activity around BlueDerby and St Helens. Within this cohort there are some operators offering unique products including different shuttle routes and vehicles.

MBP is notable due to the complete integration of its offering, where the trails, shuttle service, bike hire and rental, guiding and hospitality offerings are all provided by the Park.

Blue Derby Pods Ride is also unique in its location within a trail network and integration of unique, exclusive accommodation, Tasmanian produce and tours/guiding.

Name	Trail Areas	Services
Bark-Off Biking	BlueDerby	Bike shop, bike hire
Blue Derby Pods Ride	BlueDerby, St Helens	Tours, guiding, accommodation
Evolution	BlueDerby	Bike shop, bike hire
Gravity Isle	St Helens	Shuttles, bike hire
Into the Wild	Statewide	Transport, tour, guiding, heli-biking
MAD-MTB	BlueDerby	Transport, shuttles, bike hire
Maydena Bike Park	MBP	Trails, skills instruction, bike shop, bike hire, hospitality, shuttles
Meadowbank MTB	Meadowbank	Trails and hospitality
MTB Express	BlueDerby	Shuttles
Mountain Bike and Rock Climbing Tasmania	State-wide	Tour
Premium MTB	BlueDerby	Shuttles
Roam Wild	West Coast MTB – Mount Owen	Shuttles
Send-It Shuttles	George Town MTB trails	Shuttles
Shredly's	St Helens	Skills instruction, guiding.
Tailored Trails	State-wide	Tour, guiding
Tasmanian Mountain Bike Adventures	State-wide	Tour, guiding
Up Down and Around	BlueDerby	Shuttles
Vertigo MTB	BlueDerby, St Helens MTB trails	Shuttles, bike, hire

Differentiating Between Trails ↙

Tasmania's trail experience must be unique and high quality to be competitive and continue to attract visitors. We can ensure they are unique through locating them in unique locations or providing unique trail dynamics or a novel combination of the two. An experience can be unique due to the combination of these dimensions rather than one dimension being unique in isolation.

A trail experience is defined by the dynamic experience of moving along it and the setting it is within. These two elements provide a framework with which we can differentiate between trail experiences.

Trail dynamic is the interaction between the trail surface and a rider's ability and preferences, while the trail setting is composed of many dimensions, the most significant of which are vegetation, elevation or topography and geology.

For simplicity, each of these dimensions is considered separately, though a trail experience is obviously the product of all these dimensions interacting.

While complimentary services and activities are not discussed, a destination experience can then be considered as the sum of the trail experience (made up of the trail dynamic and setting) and the range of complimentary activities, services, hospitality offerings and local culture riders may experience. The greater the trail experience and quality of supporting services and activities, the stronger the destination experience will be for visiting riders.

Trail Settings

The setting is the environment within which a trail or network exists. This includes the topography, geology, vegetation communities and aesthetic experience an area provides. All of these factors directly influence both the trail that can be built and the experience a trail will provide.

For MTB destinations, it is an advantage to be unique. The alternative approach is replicating and exceeding the experience offered by an existing destination and these two destinations may then be in competition for the attention of the same visitor. In a Tasmanian context, establishing competition between destinations is not desirable rather a unique destination can increase the diversity of our offering, increasing Tasmania's appeal as a MTB destination collectively.

Locating trails in the range of high-quality Tasmanian natural environments is one approach to ensuring trail are unique and unable to be replicated by competitors. The environment contributes not only to the visual experience but influences the form and style of a trail.

To differentiate between trail settings in Tasmanian environments at the resolution that visitors will recognise them requires the use of broad categories that capture the visual and experiential differences.

This follows in the form of common vegetation community types, geological areas, and elevation zones.

Vegetation Communities

DRY FORESTS

There are many trails in dry forest types which in Tasmania are typically Eucalypt forests. Areas of BlueDerby, Maydena Bike Park, Wild Mersey, St Helens and George Town are all located within this vegetation category. Further development of trails within similar areas is unlikely to increase the diversity of MTB product Tasmania offers unless it is unique in another way.

From a riders perspective dry Eucalypt forests are also common on the mainland which makes trails in these environments less unique and further development of trails in Eucalypt forests, unless unique in another way is unlikely to enhance Tasmania's position.

WET/RAINFOREST

Rainforest areas are less common and are often protected through higher Reserve status. Despite this Tasmania offers MTB visitors good access to different kinds of Rainforests in Maydena Bike Park, BlueDerby and on the Blue Tier where the Blue Tier and Bay of Fires trail begin. Areas of wet Eucalypt forests are common across most of the trail destinations.

There is good supply of trails within wet Eucalypt forest and rainforest so unless an area is unique in another way further development based on access of this vegetation type will be duplicating existing experiences.

GRASSLANDS

Grasslands are less common settings for the trails of Tasmania's MTB destinations. The most extensive grassland experience and one that is unique in Australia is provided by the Silver City trails near Zeehan where aside from the loop closest to the trail head, the entire trail network is in Buttongrass plains that provide riders uninterrupted views of the landscape.

The BlueTier offers another grassland type; highland poa grassland that are traversed by the shared beginning of the Blue Tier and Bay of Fires trail.

Dry wooded grasslands with various Eucalypt species are another iconic Tasmanian landscape that due to its suitability for pastoral activities was not well Reserved. As most trail development has been on public lands, there are few trails and lesser destination trails within these types of grassland/woods.

While not naturally occurring, the pastoral areas of the Midlands and upper Derwent Valley are also Iconic Tasmanian landscapes that may appeal to MTB and cycle-touring visitors.

Future development of trails that provide visitors an experience of the range of other grasslands would increase the diversity of our trail offering. These areas are mostly private freehold and concentrated in the central and eastern parts of Tasmania where there are relatively short distances between towns, private development of these trails across public and private land would be most appropriate and could form longer distance touring routes with accommodation development or serviced by existing towns.



Altitude Zones

ALPINE

The West Coast offers most of Tasmania's alpine MTB experiences on Mount Owen and the upper extremities of the Silver City trails near Zeehan. While only 950 and 750 metres above sea level respectively, these areas are characterised as being above the tree-line and in combination with the high elevation provide impressive views (in good weather) of vast distances and surrounding mountain ranges. Alpine trails while offering a unique experience also involve the safety and experiential risks associated with elevation that include more volatile weather, exposure and rockiness.

MBP offers a brief experience of an alpine environment at its upper elevation and unlike those on the West Coast occurs in dolerite and Eucalyptus forest.

Development of trails in alpine zones in different geology and accommodating different vegetation communities is possible and would increase the diversity of Tasmanian trails. However many elevated areas of Tasmania are unsuitable or inappropriate for trail development as they have stronger natural values, involve higher Reserve classifications of Tasmania or are within National Parks or the TWWHA.

Much of Tasmania's alpine zone is also created by dolerite intrusions noting that dolerite increases the cost and complexity of trail construction and strongly influences the style of trails. Tasmania is defined by the largest dolerite intrusion in the world and dolerite peaks dominate the Tasmanian landscape. In these terms there is no more iconic environment than Tasmanian alpine areas and development of MTB product within this environment has strong potential to enhance and diversify our MTB product despite the construction challenges.

Mount Wellington, while not considered or proposed as a MTB destination in itself warrants mention as it is close to Hobart which is the port of access for riders visiting MBP and other Tasmanian destinations. There have been several proposals over recent years to extend MTB trail to higher elevations on the Mountain which would provide experience of an alpine environment in dolerite geology that does not exist at present and would be challenging due to tenure constraints elsewhere (also acknowledging the cost and complexity of trails in this geology type and the challenges associated with any development on the Mountain).

There are areas above 1000m in the North-East of generally suitable tenure and occurring on granitoid geology. The Mount Maurice Regional Reserve has previously been proposed as a feasible location for trail development and may accommodate development of further wilderness/back-country trails across a large elevation range and complimenting the existing trails in the area.

SUB-ALPINE

The sub-alpine elevation zone is below the tree-line at higher elevations in mountainous areas. MTB visitors are provided with access to sub-alpine Tasmanian environments at lower elevations on the West Coast trails and also in the North-East on the The Blue Tier. From a visitors perspective the impact of this elevation zone on experience is mostly related to the vegetation communities unique to this elevation range and the elevation range that is available to descend from when starting in the sub-alpine zone.

Further development of trails in sub-alpine areas with different geology and within different vegetation communities is a potential approach to adding further unique MTB experiences. This could be achieved in the North-East as part of the development of further alpine experiences.

MONTANE AND LOWLANDS

Montane and lowlands are the lower slopes of mountains and areas that are not mountainous respectively. Most of Tasmania's trail supply is located in low-moderate elevation ranges. This does present some advantages related to stability of weather and access but similarly limits the elevation range available to riders and the diversity of experience a single trail or ride may involve.

While most destinations include trails within this elevation range Tasmania's coastal environment is one type of lowland environment not accessed by significant trail volumes. The end of the Bay of Fires trail and town-link of the St Helens MTB trails are certainly within coastal settings though development of an experience that follows part of the Tasmanian coast is another approach to development of further unique MTB experiences. It must be noted that coastal environments typically involve greater social, natural and cultural values and location of an appropriate and feasible development area requires significant further work.

GRANITOIDS

Granitoids are a group of coarse grained, igneous rocks made mostly from quartz but including other minerals. Granitoids are the most common igneous rocks on earth and occur widely across north-east, east and west coast of Tasmania. Some of Tasmania's most recognisable landforms, the Hazards in Freycinet National Park are granite. Granitoids generally weather into rounded bedrock and surface rock that can be easily included in trails and provide features that would not be sustainable if made from soil. They produce soils that usually involve coarse sand particles on the surface and finer clays below the surface depending on the composition of the parent rock. Granitoid soils, are usually more erodible than soils with higher clay content and finer particles.

In other parts of the world, some of the most popular riding areas are developed in areas of granitoids due to the technical features they can provide.

The trails of North-East Tasmania in BlueDerby and St Helens MTB both occur in areas of granitoids and make good use of the opportunities the geology provides. There is also a short section of trail within the Silver City trails that in the context of that trail provides an interesting and obvious contrast to the rest of the network located on siliceous gravels.

Further development of trails in this geology type would only increase the diversity and uniqueness of Tasmanian MTB experiences if they varied in another dimension, for example occurring in another vegetation type, elevation range or providing a distinct trail dynamic.

DOLERITE

Tasmania has the largest dolerite intrusion in the world. Dolerite is an igneous intrusive rock that typically creates sharp, angular rocks that can be difficult to incorporate in trails that are enjoyable for a wide range of users. Building sustainable trails in areas of dolerite is more complex and more expensive than other geology types.

Many of Tasmania's most recognisable mountains are dolerite and while this geology type does present challenges development of high quality trails is possible and should be considered as they would be distinctly Tasmanian.

George Town Mountain Bike Trails are located entirely on dolerite and the networks do include some trails that effectively incorporate its unique properties in the trail surface. Most of the trails are larger-scale flow trails that may prove maintenance intensive over time and would be better suited to other geology types. George Town also offers some areas of novel and pleasant vegetation and occurs over a moderate elevation range.

Three trails at the highest elevations of the MBP are also in an area of dolerite. These trails also occupy pleasing and unique vegetation communities that include Pandanis and the Tasmanian Waratah. Increasing the volume of this or similar experience particularly if it accessed dramatic dolerite columns or cliffs would add diversity to the MBP network and Tasmania's MTB product.

Further development on dolerite should only be considered where other dimensions also contribute to the strength of the experience a completed trail would provide (vegetation, elevation and elevation range) and should not replicate the existing network at George Town.

QUARTZ, CONGLOMERATE AND SILICEOUS GRAVELS.

This range of loose gravels with low plasticity (ability to be formed into shapes) is common across much of the West Coast with smaller areas elsewhere. The free-draining characteristics enable year round riding in the high rainfall climate of the West Coast across which they are found.

Loose, poorly consolidated gravels limit the style of trail that can be constructed and is less suitable for the development of beginner trails due to the loose surface they typically produce. They are also highly erodible which reduces the maximum sustainable trail grades though this can be mitigated where bedrock is available to use as trail tread.

Further trail development on the West Coast may involve establish trail in this geology type though aside from its compatibility with high rainfall is not considered a factor that contributes positively to trail experience.

SILTSTONE/MUDSTONES

Where sufficient moisture is present, Siltstone and Mudstone can provide an excellent riding experience and a good medium for larger scale jump and flow trails.

Construction and maintenance costs in these areas are typically low when appropriate consideration is given to minimizing trail gradients, the need for braking is reduced through trail design and ground moisture maintains soil plasticity.

In dry areas, these soils may degrade quickly and are moderately prone to erosion, where there is sufficient rainfall and ground moisture.

Significant areas of the St Helens Flagstaff/Loila Tier network occurs in mudstone and has allowed the construction of large-scale flow/jump trails. The dry climate of the East Coast does impact trail stability and sustainability over drier months but also provides consistent riding opportunities over winter while the ground in other areas may be saturated.

Further development or redevelopment of flow/jump trails is best suited to this geology type.

Trail Dynamics

Trail dynamic refers to what it is like for a rider to interact with and move along the trail, it can also be described as trail style.

Where the goal is to develop unique experiences that will attract visiting riders, a unique trail dynamic is one factor that can be used to establish a unique trail experience that will stand out in a competitive market.

To discuss trail dynamic, it is necessary to agree on terms that can be used to describe different types of trail dynamic. There is no universally accepted way to do this, but there are broad terms in use that are reasonably well understood. The trail classification system accompanying the Plan is an attempt to move toward standard terms that allow clearer communication about what a trail is, what sort of experience it offers and allow specification of trail attributes prior to design and construction.

While some geological settings may dictate the trail dynamic, for example if it is very rocky and there is a lot of exposed bedrock, the resultant trail will be rocky, in areas where there are good soil depths, flow style trails can be manufactured in any configuration imagined by the builder.

Noting that a trail or network is usually composed of more than one trail dynamic, the distinctions made in the trail classification system and the supply of each in Tasmania follow:



Technical

Trails with irregular surfaces and involving frequent and quick changes in rider speed for most riders. Well built technical trails may allow experienced riders to navigate the trail at constant speeds. They may be machine or hand-built but involve less features usually associated with Flow trails like cambered corners and constructed grade reversals.

Tasmania has some supply of technical trails but as most modern trails are machine built many of the surface features that combine to create technical trails are removed. There are some exceptions particularly in rockier settings like George Town where smaller rocks and bed-rock create technical challenge as the trail wears.

BlueDerby offers some technical trails, mostly those developed for the EWS/EDR events, Black Dragon and Atlas. MBP has a larger volume of technical trails across a range of

TDR's due to the greater use of hand construction.

Further development of technical trails, particularly at the easy and intermediate level would add to the range of MTB experiences Tasmania offers. Due to the prevalence of machine construction, hand-built technical is one trail dynamic that is less likely to be constructed in significant volumes elsewhere. The reduced construction and trail footprint of this style of trail can also make it more compatible with higher conservation value settings.

Flow

Usually machine-built trails featuring significant surface profile manipulation to create berms, rollers and jumps. Tend to be smoother surface. Slower and fewer changes in rider speeds than technical trails.

Flow is the most common trail dynamic across all Tasmanian trails and mainland Australia. This is due to their popularity and accessibility for riders of most technical abilities and their compatibility with machine/excavator trail construction. Developing further

flow trail will not in isolation increase the diversity or appeal of Tasmania's offering though the development of flow trails in unique settings may be desirable due to their accessibility to a broad range of visitors.

Jump

Trails with a focus on jumps. Aside from jump lines that don't involve corners, will usually involve the features of Flow trails.

The popularity of jump trails is demonstrated through the enormous popularity of Air-Ya-Garn in Blue Derby and the range of jump/flow trails across other areas.

Jump trails, however well built do require increased maintenance inputs relative to other trail dynamics due to the gradients of jump take-off and landings. Business models that accommodate this cost are required to ensure trail economic sustainability and this trail style may be better delivered in privately operated settings.

Supply of jump trails by different TDR's is strongly biased toward difficult trails with lesser volume of easy, intermediate, and extreme trails.

Further development of easy and intermediate jump trails that provide visiting and local riders with safe opportunities to develop the skills and confidence to approach difficult and extreme trails will improve visitor safety and experience.

Freeride

Trails with a focus on and oriented around riding natural and constructed technical features; other than jumps. Can include rock slabs, drops, step-downs, wall-rides, balance features etc.

Freeride trails are less common across Tasmanian trail areas and where they do exist tend to be of higher TDR's.

BlueDerby, largely through the trail developed for the EWS/EDR offers a range of trails with freeride elements including Kuma Gutsa, Detonate, Black Dragon and Cuddles. St Helens MTB trails offers Mach 10, George Town MTB trails: Devils Elbow and Wild Mersey incorporates freeride features in several trails most notably the timber lilly-pad feature on the intermediate TDR Super Hornet.

MBP as the only Tasmanian destination that is actively differentiating between trail dynamics or trail styles for visitors includes jump trails in their freeride category and while not made explicit, the freeride trail dynamic proposed in the TCS would fall within the MBP technical classification. Noting this discrepancy and that alignment between the classification systems should

be a goal in future, MBP, by the definition proposed in the TCS, offers a good range of freeride trails, though as in other areas, there are a greater number of trails with higher difficulty TDR's. Most features are rock rolls or drops though other features including a container step-on/off have been developed recently.

Further provision of freeride trail features across the full range of TDR's and involving the unique geological opportunities Tasmania provides will increase the uniqueness and depth of our product offering. As for all other trail dynamics, further development of features at lower TDR's and providing clear and incremental opportunities for riders to safely develop skills will improve visitor experience and safety. These features are best delivered in network settings close to access points and support.

Flat

Trails that don't use camber or vertical profile changes to influence rider experience and behaviour. Usually either very easy trails for beginner riders or connecting trails. May be dual direction and shared-use.

Flat trails in this context tend to be utility trails used to connect different trail areas, for a range of trail users. By most definitions, these do not constitute MTB trails but given their role in our MTB networks are included here.

There are some examples of flat trails associated with trail networks that do add value for visitors as introductory experiences and for non-MTB rider visitors that are part of larger groups. Where there are existing visitor flows, they can also play a role in increasing stay for non-MTB visitors. The Valley Ponds connects Derby to the nearby town of Branxholm (Vertigo use this for

an introductory product), the range of trails around Lake Derby and providing access to the Floating Sauna and the Townlink trail in St Helens all enhance and broaden visitor experience.

Flat trails as access routes add to MTB destinations where they connect points of interest or provide access to interesting natural or cultural features. Further development of flat trails should be pursued where there are existing visitor flows of non-MTB riders and where they can serve a secondary purpose by providing access or egress to new MTB trail experiences, services or complimentary tourism products.



Technical Difficulty Ratings

In addition to the surface or profile of a trail, different riders will interact with a trail in different ways. One factor that will determine how the rider interacts with the trail will be the relationship between their technical ability and the technical demands of the trail. For each of the trail dynamics listed it is possible to create trails of lesser or greater technical difficulty.

Technical difficulty is assessed and communicated using a system derived from skiing and adapted to MTB. IMBA provide international guidelines and Australia through MTBA and now Auscycling have adapted this international guide to the Australian context.

While considering technical difficulty alone doesn't provide particularly useful insights, comparing trail TDR across different types of trail dynamics and settings can reveal gaps in supply and opportunities for development.

Across all Tasmanian trail areas the distribution of trails by technical difficulty reflects typical distributions. Most trails are intermediate with slightly fewer easy trails and significantly less difficult and extreme trails. MBP is the only area to offer an additional level of TDR 'Pro-Line' which while not included in the Australian adaptation of IMBA TDR's is commonly used in bike parks across the world.

George Town, BlueDerby and St Helens offer typical proportions of trail TDR's with the longer distance wilderness trails sensibly developed and maintained to intermediate TDR. BlueDerby has a slightly higher proportion (by trail number) of difficult and extreme trails due to trail development required to host the Enduro World Series events.

Wild Mersey offers mostly easy and intermediate trails with less than 10% of the trails being difficult or extreme TDR.

Proportionally, there are more difficult and extreme trails on the West Coast due to the topography and geology rather than a deliberate targeting of riders with greater technical ability. Development of some accessible, easy trails on the West Coast, where there are existing flows of visitors has the potential to create further business opportunities and increase visitor stay/spend.

MBP was initially regarded as a network oriented around more difficult descending trails but over their 6 years of operation has increased the volume and diversity of easy and intermediate trails. The network is still composed of approximately 40% difficult, extreme and Pro-Line trails but offers clear opportunities for safe progression through easy and intermediate technical and jump trails.

As noted in the discussion of trail dynamics, across all networks there are few easy and intermediate jump trails and technical trails that retain surface features like rocks and roots.

Increasing the diversity of lower technical difficulty trails across networks and offering safe, incremental opportunities to develop technical skills will improve visitor experience and reduce demands on emergency services attributable to riders wanting a particular trail dynamic but only having more challenging trails from which to choose.

There is a gap in jump and freeride trails in most networks evident in the lack of easy and intermediate trails with technical features consistent with the TDR. This is due to many trails, while graded as easy or intermediate including only avoidable features with higher TDR's. Further development of easy and intermediate jump and freeride trails is recommended across most networks.

Difficult and extreme trails that accentuate the geological differences between areas is another opportunity to add diversity and appeal to networks.

Business Models

MTB product development in the form of MTB trails is uncommon in the tourism sector as it is largely publicly funded and free-to-use aside from MBP and the small trail network of Meadowbank MTB.

A lack of strategy around revenue generation or business model across public trail areas is reflected in the ad-hoc approach to revenue generation to address the increasing costs of operation. Some aspiring mainland destinations are implementing pay-for-use systems in recognition of this and based on observation of Tasmanian destinations.

Most trail areas have been constructed through primarily Federal funding with varying levels of State and Council contribution with the implicit expectation that the dispersed/indirect economic benefits the trails provide offset the direct costs of maintenance and redevelopment. Ongoing management and maintenance is resourced by Councils through a range of mechanisms including operator levies, per-rider charges on shuttle operators and sponsorship.

There are a range of development and business models in place or that may be adopted to improve the sustainability of MTB trails developed for visitors into the future. Changing the business models in place across some Tasmanian destinations should be considered.



PRIVATE DEVELOPMENT ON PRIVATE LAND:

Maydena Bike Park is the only large-scale private development on private (and public) land in Tasmania. Development, maintenance and management of the trails is resourced by the Park's business activities based on the trails including shuttles, food and beverage and complimentary tourism products. The Park is also able to offer medical and bike-patrol services that enhance visitor safety and experience relative to free-for-use models.

Further private trail development on private land that adds to the collective appeal of Tasmania's MTB offering where it is consistent with the MTB vision and opportunities identified elsewhere should be supported.

PRIVATE DEVELOPMENT ON PUBLIC LAND:

Again MBP is the only large-scale private trail development on public land and was facilitated by the State Government EOI process. The Blue Derby Pods Ride was also enabled by that process and is an integrated boutique accommodation, hospitality and tour business. While not trail infrastructure, is a unique MTB based product located within the BlueDerby trail network that enhances the diversity and appeal of our MTB product.

Appropriate private development, and operation of businesses on public land through lease arrangements places the burden of development and operation costs on private businesses rather than Government.

Further private development on public land may be one approach more widely employed in future to reduce the demand on public resources, maintain community support and ensure economic feasibility of developments.

PUBLIC DEVELOPMENT ON PUBLIC LAND

Public development on public land has been the approach most widely employed across Tasmanian MTB destinations. In most cases, the proponents have been Councils or Northern Tasmanian Development Corporation in the case of BlueDerby. Development funding has been provided by Councils and the State with most funding provided through Federal programs often coinciding with Federal elections.

This approach provides dispersed economic benefits to local/Tasmanian communities that occur through increased visitation that trails create. Maintaining community support for ongoing development and operations requires the LGA to be able to demonstrate expenditure on trails is exceeded by the net community benefit, usually defined as economic benefit. This requires measurement of the revenue generated by trails, which is difficult and yet to be done.

Initiatives have been employed to generate direct revenue from trails including license and per rider fees for shuttle providers, the sale of branded merchandise, trail/network sponsorship and levies on accommodation and tour providers through a centralised booking platform.

More maintenance intensive trails may be best delivered through alternative models and provision of these trails in free-for-use settings as is currently the norm not only presents challenges for Government trail managers but discourages potentially sustainable, private development.

PUBLIC DEVELOPMENT WITH INFRASTRUCTURE LEASED BY PRIVATE BUSINESSES PAYING A LEASE TO GOVERNMENT.

This approach is not employed in Tasmania for the MTB trails but is has been used for infrastructure of other kinds. Lease arrangements would include payment of a lease to operate MTB infrastructure developed using public funds. The lessee would assume responsibility for trail management and maintenance within terms defined by the lease, freeing the development proponent from ongoing costs.

The mechanisms though which revenue could be generated for a lessee to cover operating costs would be the same as those used by private developers/operators. The indirect economic benefit attributable to trail visitation would still exist where primarily accommodation and hospitality businesses service visitors and MTB specific businesses were operated by the lessee.



Trail Classification System ↙

This Plan is accompanied by and informs a Trail Classification System (TCS). The TCS is intended to provide a framework that enables consistent classification, communication and specification of MTB trail infrastructure.

The TCS captures the range of attributes that contribute to the experience a trail provides for users as well as other factors that may influence trail management.

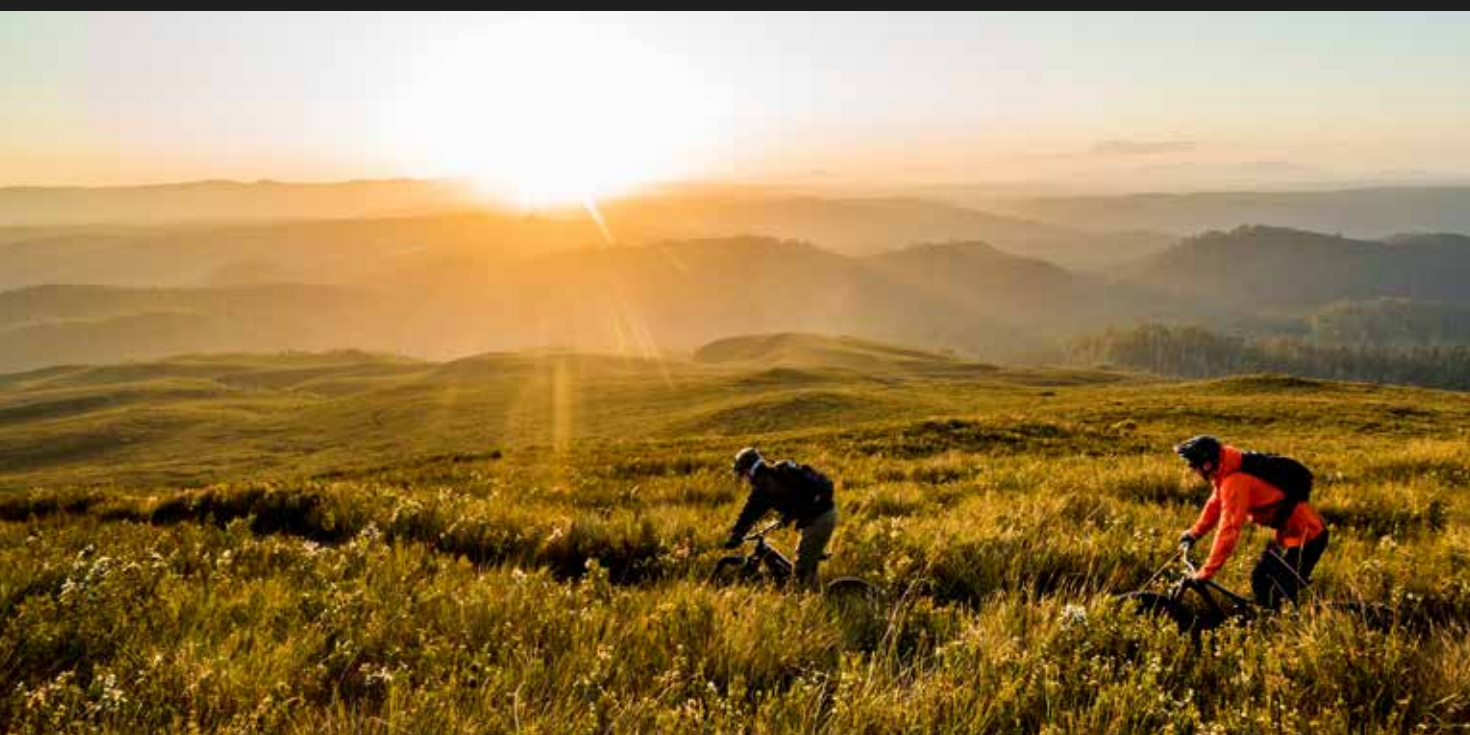
Aside from the TCS there is no standardised language or terms that enable clear communication of what a trail is and what it does or should involve. This makes it difficult to specify what a trail should be and do through procurement as well as communicate to market the differences between trails in a concise and consistent manner.

There are common or popularly used labels and a range of proprietary terms used by different companies within the trail industry. These have been synthesised and integrated into the TCS. Rather than nominate broad or general categories (that is more appropriate for a market facing system) the TCS classifies trails by a broad range of attributes.

It is distinct from the IMBA/Auscycling Technical Difficulty Rating System (TDRS). The TDRS only captures those factors that influence the technical difficulty a trail involves for riders. The TCS however, includes the TDRS rating as just one attribute of a trail that contributes to rider experience in addition to many other factors.

The TCS will provide an opportunity to develop network and State level trail inventories that combined with trail use data will allow better understanding of what kinds of trails settings appeal to riders. The TCS may also be used as the foundation of a template used in trail procurement processes, specifying the complete range of trail attributes and ensure clearing communication by a proponent of the expected construction outcome and for contractors, increases the likelihood of them pricing the same product as their competitors.

It is intended for administrative purposes though a market facing, simplified version should be developed to allow consistent communication of the attributes of Tasmanian MTB trails to visiting riders.



Trail Significance Continuum ↙

Consideration was given to updating the Hierarchy contained in the Tasmanian Mountain Bike Plan (2009) with current examples of infrastructure that could be assigned to each Tier. However, it is difficult to specify different attributes would be associated with infrastructure located in a particular tier, rather it is just the quality of the same attributes that seem to determine the success of trail infrastructure. The success of trail development is determined by the quality of trail experiences and the destination experience by the trail experiences and the range of other services and activities available.

As a result, the allocation of a trail or trail area to a tier or range within the hierarchy is determined by the quality of trail, the quality of setting/natural environment, the experiences uniqueness and volume or duration of experience. Tasmania has sufficient trail volume and the trail experiences are generally located close enough to others for this to be less significant.

Due to the multiple rider populations a trail area can serve, adopting a continuum rather than hierarchy is more appropriate. Locating specific infrastructure on a continuum will in most cases rely on observation of its demonstrated function, *who is actually using the trails?* Noting that riders will travel further for unique quality experiences not available closer to them. Most trails or trail areas will attract a range of users including locals or international visitors, but for this purpose considering the origin of the majority of users is valuable.

The current IMBA definition of a destination requires significant interstate and international visitation. The delineation it offers is:

- **NEIGHBORHOOD TRAIL SYSTEM** – A very small trail network with 1-5 miles of trail that serves a local neighbourhood, providing up to two hours of unrepeated riding.
- **COMMUNITY TRAIL SYSTEM** – A trail system with up to 10 miles of trail that serves one or more surrounding neighbourhoods, providing up to a half-day of riding.
- **REGIONAL TRAIL SYSTEM** – A larger trail system with roughly 10-25 miles of trail that serves an entire city, county, or state, providing half- to full-day (or potentially more) of riding. Ideally features a full mix of trail types and difficulty levels with high-quality riding experiences.
- **DESTINATION TRAIL SYSTEM** – A larger trail system with 25-50+ miles of trail that attracts riders from all over the country or world, providing multiple days of riding. Typically features a full mix of trail types and difficulty levels and provides high-quality rider experiences.

It is important to note that the Continuum is not a measure of the value of a trail development as local and regional trail opportunities are important to meet recreational demand. It does however allow consideration of a trail/networks function related to its objective.

For proposed developments, location of infrastructure on the continuum will rely on clear articulation of the trail style, the trail setting and its uniqueness.

Consistent with the IMBA system, the following ranges are proposed with their correlates with the most recent IMBA tiers in parenthesis:

Local (Neighbourhood):

Trail infrastructure located close to population centres intended to satisfy local, recreational demand. The quality of the trail setting is not as significant as users are prioritising accessibility and convenience over trail experience quality.

Regional (Community):

Trail infrastructure that exceeds the quality and often volume that riders have access to in their local area. This involves either a natural setting or quality of trail dynamic that exceeds what riders have closer to home and will motivate them to travel additional distance. Trail volume also plays a role. There may be some interstate visitation but regional trails were not the motivation for their travel to Tasmania, rather they travelled to ride somewhere else and have taken advantage of these trails to supplement the primary experience.

National (Destination):

Trails located in high quality natural environments and offering a high quality trail dynamic appropriate to the experience. Together composing a unique, nationally competitive product. Will also attract riders from the local and regional area.

Iconic (Destination):

The strongest and most unique examples of Tasmanian trails. Located in iconic Tasmanian environments and offering a unique trail experience defined by the setting and appropriate to the trail purpose.

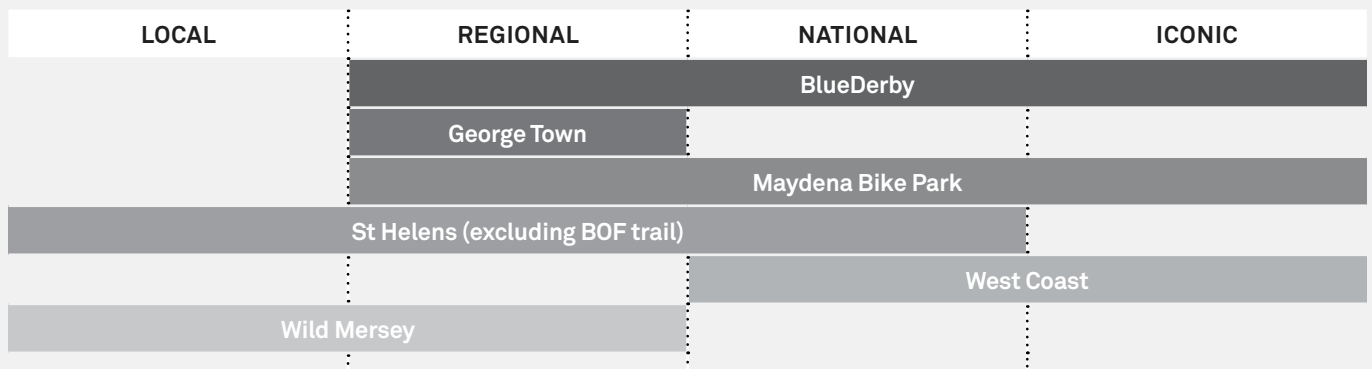
Trail Significance Table

The following table shows the further defines the ranges within the significance continuum and provides examples of existing infrastructure that meets each range:

Trail significance	Format	Definitive Attributes	Examples
Iconic	Network or stand-alone	The strongest examples of Tasmanian trails. Located in iconic Tasmanian environments and offering a unique trail dynamic defined by the setting and appropriate to the trail purpose. Uniqueness in the National Market.	Maydena Bike Park, Blue Derby, West Coast Trails, Bay of Fires Trail, Blue Tier Trail.
National	Network or stand-alone	Located in Tasmanian natural landscapes. High quality trail experience	West Coast, St Helens Flagstaff and Loila Tier Trails
Regional	Network	Trail volume or quality exceeds riders local opportunities and the network attracts riders from elsewhere in Tasmania.	Georgetown Trails, St Helens Flagstaff and Loila Tier Trails, Wild Mersey.
Local	Network	Located close to population centres. Trail quality or setting is insufficient to attract riders from outside the local area.	Meehan Range, Mount Wellington, Trevallyn, Kate Reed, Penguin St Helens Flagstaff and Loila Tier Trails.

Locating Tasmanian MTB Developments on a Trail Significance Continuum

The following graphic shows Tasmanian trail areas developed for visitors and their location on the significance continuum. The location is based on self-report, independent observation and in fewer cases, research and data.



Existing Research and Data ↙

Summary

There is difficulty quantifying MTB participation, demand, visitor behaviours and economic benefit due to the independent and dispersed nature of MTB visitation. While recognising this inherent challenge, very few attempts have been made to understand the number, attributes and behaviour of visiting riders. Frequently cited visitor estimates conflict with the little data that is gathered and indicates the need for accurate research to quantify visitor numbers, behaviours and the impacts of visitation.

Beyond MBP there is no accurate account of visitor numbers nor economic impact analysis which can demonstrate economic and community benefit. This limits the ability of trail managers to demonstrate the benefit of MTB tourism to their communities and to make a strong argument for further investment in trails.

There is no data quantifying the relatively popularity of different trails despite most trail managers having and using trail counters which makes it very difficult to identify what sorts of trails are attracting visitors.

Most data that is available relies on self-report rather than revealed preferences. Though there is little data available, what does exist shows agreement around visitor characteristics and motivators.

Following are brief summaries of existing research and data.

Further research and data collection will improve decision making and is a priority action recommended by this Plan.

Tasmanian Visitors Survey, Tourism Tasmania, 2022

The Tasmanian Visitors Survey is undertaken by Tourism Tasmania with over 9000 respondents per year sampled from exit air and seaports. Consequently, the data reflects visitors to Tasmania and excludes intrastate visitation.

Key data includes:

- Financial year 21/22 23810 visitors to Tasmania mountain biked while they were here.
- This reflects a 197% increase since 2014.
- MTB riders spent more per visit to Tasmania than other visitors (\$4269) and stayed longer (18.5 nights) per visit.
- MTB riders account for 5% of visitor nights in Tasmania and 3% of total visitors.
- While the TVS does capture data describing where visitors went, it doesn't directly link those places to activities. For example 9696 visitors that mountain biked during their visit also visited Derby and while it is safe to assume that if a visitor mountain biked and visited Derby they would have mountain biked there, the correlation would be less strong for other destinations/regions.

Mountain Bike Visitation 2021-2022, Break O'Day Council

Of existing the MTB networks administered by Councils, St Helens and Break O'Day Council are notably proactive gathering data to understand their visitors and inform future development.

This report describes a research project undertaken Break O'Day Council to better understand the use of their trail network. The survey received 365 responses up to March 2022.

Survey results indicate that:

- Visitation of St Helens MTB trails is primarily intrastate. 81% intrastate, 18% interstate and 0.5% international visitation.
- Most respondents were travelling with family.
- Most common respondent age is between 36 and 55 years old.
- Their primary purpose of travel to St Helens was to MTB.
- Most respondents were an intermediate (45%) or advanced (45%) rider.
- Most respondents also intended to visit other Tasmanian MTB destinations in the next month.

Economic Impact Analysis, Maydena Bike Park. Elevation Parks, 2023.

This economic impact analysis was undertaken by Maydena Bike Park to demonstrate the direct and indirect economic value of the Bike Park to the Tasmanian economy.

Maydena Bike Park is in the unique position where they accurately record visitor numbers as all riders of the Park must register their visit.

In addition to the economic impact analysis the document describes other characteristics of Park visitors that align closely with other research findings. Economic impact figures are calculated using TVS daily and overnight visitor spend.

Key findings:

- 25000 visitors of the Bike Park (excluding general visitors engaging with the Parks hospitality offerings)
- Direct economic impact of \$13.92 million.
- Indirect economic impact of \$26.45 million.
- Projection of total annual economic impact for year 23/24 of \$40.73million.
- 40% intrastate, 50% interstate and 10% international visitors.
- Key international visitor markets; NZ, USA, Canada, Singapore and Hong Kong.
- 80% male, 20% female visitors.

Xyst, Derby, Tasmania, (Unknown) Yarra Ranges Council.

This fact sheet presents the results of a visitor survey conducted at BlueDerby. The research was commissioned by the Yarra Ranges Council and undertaken by recreation planning consultants Xyst to inform the planning of the Warburton Mountain Bike Destination. It is a demonstration of the increasingly strategic approach to planning MTB developments in Australia and reflective of the increasingly competitive market.

The Warburton development is one of an increasing number of large MTB trail developments in development in Australia and attracted particular attention because of the rigour and contentiousness of the planning and approval process it had to navigate. The project has now been conditionally approved with exclusion or modification of some of the trails that composed the initial plan.

While the survey questions are unknown the information presented describes visitor attitudes and behaviours related to two 'wilderness' or 'epic' trails; the Blue Tier trail and Bay of Fires trail. The sample size was 300 visitors.

Key findings are:

- 56% of respondents indicated they had or intended to ride either the Blue Tier or Bay of Fires trail on their visit.
- 50% of those who did not do those rides would return to do them.
- 37% of visitors indicated that completing one of the two trails was the main driver for their visit and for 20% it was the whole reason for their visit.
- Average stay of those who completed the Blue Tier or Bay of Fires trail was 4 nights and those that did not ride either of those trails stayed 3 nights.
- 76% said they would stay less nights if those trails did not exist.
- Main drivers were 'spectacular scenery and natural values' (46%) and 'challenging and technical trail' (20%).

What makes mountain biking enthusiasts unordinary. Tourism Tasmania, 2020

This fact sheet produced by Tourism Tasmania as part of the Unordinary Adventures program provides a MTB visitor profile through reference to 3 research initiatives.

These are, with key points following:

- Tasmanian Visitor Survey Statistics for year ending March 2020. 27000 interstate and international visitors mountain biked while in Tasmania, annual growth of 11% over previous five years, MTB visitor average stay is 12.5 nights, MTB visitors spend more than non-MTB visitors with an average spend of \$2540 per trip.
- Tourism Tasmania's MTB Situational Analysis – 2020: MTB travellers are repeat visitors that use the Sprit of Tasmania and air, seek connection to the natural environment, are interested in other nature-based experiences, appreciate fresh, local produce in pub or restaurant settings, dwell online though are influenced most heavily by word of mouth not responding as well to traditional advertising mediums.
- Kantar research commissioned by Tourism Tasmania: MTB enthusiasts are approximately 2% of Australian special interest travellers, MTB travellers visit different destinations with the same group, MTB provides a sense of freedom and adventure which is enhanced by natural environments, demographics consistent with other research, most are intermediate to advanced riders. MTB travellers identified access is a barrier to visiting Tasmania.

Mountain Biking Situation Analysis – 2020. Tourism Tasmania, 2020.

Developed by Tourism Tasmania through consultation with key stakeholders involved in the management or delivery of MTB product.

Key Points:

- MTB is well-aligned with Tourism Tasmania's brand.
- Tasmania's competitive advantage: World renowned trail design, trail diversity, quality of the environment, accessible remoteness, mountain biking towns.
- BlueDerby's attributes contributing to its success: Dirt quality, trail quality, quality of the environment, topography, accessibility of key markets, supporting hospitality product, history. Interestingly mentions that MTB visitors tend only to MTB during their visit and there is not strong uptake in other complimentary activities. It is reasonable to suggest that this is due to the limited offering in the area rather than the appetite of visitors.
- Maydena critical attributes: Elevation, trail quality, trail diversity, quality of the environment, accessibility of key markets, hospitality product and complementary activities.
- St Helens critical attributes: Quality of environment, topography and geology, quality of trail, coastal contrast ie point of difference, broad appeal, complimentary product and shack-town atmosphere.
- Key market is urban professionals that are MTB enthusiasts.

Mountain Biking in Australia: An Economic and Participation Analysis, 2021.

Commissioned by Auscycling, the national body for cycling that recently includes MTBA and undertaken by GHD Advisory, this report sought to quantify participation numbers and the economic impact of mountain biking across all sectors in Australia.

The value of this report is how effectively it demonstrates the difficulty of quantifying participation and the economic value of an independent, uncoordinated recreational activity like MTB and the work that remains to understand participation, demographics and behaviors of MTB riders in Australia.

Unfortunately, as described in the Executive Summary, the methodology employed, using the known number of MTBA members in Australia to infer the total number of mountain bikers in Australia. This was achieved by random sampling at trail heads to produce a ratio of MTBA:non-MTBA members. This ratio was then used to calculate the number of non-MTBA members at a national level using the known MTBA membership figures. Using this approach with the initial sample produced a figure of just under 74 thousand participants nationally.

This figure disagrees with observations of the size of rider populations around established destinations and regions with high MTB participation, a claim supported by estimates developed by Ausplay.

The sample bias was explored by the authors through a deliberate sample selection away from riding areas closely associated with MTBA Clubs. The alternative samples produced a national participation rate of over 800 thousand riders; over two times the Ausplay estimate and ten times the value of the initial sample and methodology.

This variance of an order of magnitude between the methodologies demonstrates clearly the difficulties acquiring data describing MTB participation, visitation and economic impact. This is due primarily to the MTB riding and travel being largely independent with no reliable way of capturing or engaging with riders across the increasing number of dispersed trails, networks and products they access.

The report goes on to extrapolate from the data describing behaviors and expenditure associated with MTB participation derived from the initial survey though applied to both the participation figure that methodology produced and the Ausplay estimate which was considerably higher. This approach yields a Total Impact of participation of mountain biking; based on the 341,900 rider market size identified by Ausplay of \$1.4 billion.

The report describes employment by industry supported by MTB riders in Australia and curiously lists no Transport, Rental, Hiring or Real Estate FTE's. This demonstrates the lack of familiarity with the subject and operation of existing MTB destinations and products of those undertaking the analysis. Within any major MTB destination, there are multiple transport and accommodation roles sustained by MTB visitation for a majority of the year.

Other key information derived from a combination of literature review and survey results contained in the report includes:

- 80% male, 20% female participation
- Most riders are between 30 and 60 years of age with one third between 40-49
- Average rider expenditure on transport, meals and beverages and non-bike retail associated with riding activities is \$2282
- Average annual expenditure on riding equipment is \$4921
- Access to recreational trails creates significant measurable environmental, social and health and economic benefits.

2016 Australian Mountain Bike Market Profile – Survey Data, 2016.

Undertaken by Tasmanian trail construction company Dirt Art, the 2016 is the largest and most recent market survey publicly available. This is the second market survey completed by Dirt Art with the initial conducted in 2014 and the relationship between the two sets of data does begin to demonstrate changes in rider demographics and behaviors over time.

It must be noted that in the 6 years following this survey, mountain bike participation, infrastructure development and technology has continued to improve at a rapid pace with some key and specific current trends and behaviors, like e-bike use, not captured or reflected due to the timing of the survey.

As it is a survey, results are reported rather than revealed preferences so there are some inaccuracies to be expected attributable to self-reporting. Despite the time that has passed and significant changes in the mountain bike and trail supply landscape that have occurred over the interval between the two documents, the survey characterizes the typical mountain biker in a way largely consistent with that offered in the 2009 Tasmanian Mountain Bike Plan.

There were 4019 respondents to the survey with key details as follows:

- 84% of respondents were male with 16% female
- Most riders were between the ages of 25 and 54 with 33% in the 35-44 age bracket
- Most riders earned between \$60 000 and \$100 000 per year though nearly 20% of respondents reported earning >\$100 000 per year
- Most riders were from NSW with roughly equivalent numbers from Victoria and Queensland
- Most riders own one or two bikes with a majority owning bikes worth more than \$4000 and spend up to \$3000 per year on bikes or equipment
- The preferred riding style of a majority of riders is All-Mountain (the non-competitive equivalent of endure riding/racing) followed by XC (cross country)
- Over 75% of respondents have either undertaken or are interested in undertaking skills instruction
- 55% of riders had participated in an organised event in the last 12 months though this figure had reduced by 10% over the 2 years since the previous survey
- A 18% decline in participation in XC (Cross country) events and 10% increase in gravity endure event participation was evident between the two surveys
- A strong majority (69%) of riders travel outside their home state to ride at least once per year
- Most respondents most commonly ride trails of either intermediate/ more difficult (61%) or advanced/ most difficult (30%) Technical Difficulty Rating with 56% of riders preferring 'descending' rather than 'undulating' trails
- Trail quality is the major determinant (64%) of riders assessment of attractiveness of a mountain bike facility over location/ accessibility (20%)
- Most riders (45%) self-report their riding ability as 'advanced'

Engagement with Industry

Consultation with stakeholders was undertaken through the project Working Group. The Working Group was composed of individuals, businesses and Government agencies involved in the development, management or support of MTB product across Tasmania.

The Working Group was composed of representatives from:

- Parks and Wildlife Service, Tasmania
- Sustainable Timbers Tasmania
- Department of Police Fire and Emergency Management – Police Search and Rescue
- Department of Police Fire and Emergency Management – Ambulance Tasmania
- Tourism Tasmania
- Destination Southern Tasmania
- Visit North Tasmania
- West X North West
- World Trail
- Dirt Art
- Break O'Day Council
- Dorset Council
- Georgetown Council
- Kentish – Latrobe Council
- West Coast Council
- Vertigo MTB
- Maydena Bike Park
- Mountain Bike Network Tasmania

Individual sessions were conducted that enabled members of the Working Group to share their experience and insights related to the development, management and marketing of Tasmania's MTB product. Meetings were recorded and transcripts retained to support the project. The content of these discussions, where appropriate and supported by consensus, observation or evidence, has informed the project outputs, recommendations, Trail Classification System and Feasibility Assessment Framework.

The Working Group was also involved in reviewing the project outputs at several stages prior to finalisation of tools and the Action Plan.

Consultation Outcomes

Key ideas expressed through consultation were:

INFRASTRUCTURE

- There is a widespread recognition of the alignment of MTB tourism and Brand Tasmania as well as visitor expectations that trails will be in high quality natural Tasmanian environments.
- Visitors are seeking products that provide an authentic Tasmanian experience through environment or culture.
- Key factors that contribute to the success of destinations are accessibility, geology/soils, and the quality of the natural environment.
- There is a developing understanding of the different physical attributes of development areas and their impact on development cost, trail experience for visitors and maintenance costs.
- Despite a slowing of the rate of trail development, multiple LGAs interested in MTB destination development, particularly in the South though the active proposals suffer significant limitations and challenges.
- At this stage with Tasmania having established several distinct and successful destinations focus should shift to consolidation and promotion of destinations. Further development and renewal of trails rather than more large trail networks.
- There was concession by some trail managers that despite an ambition to achieve a market position equivalent to BlueDerby and Maydena Bike Park, for a range of reasons they will not achieve the same levels of success.
- There is incompatibility between forestry activities and trails developed for visitors though it may be more appropriate to locate higher impact trails like large-scale jump lines in areas of private plantation or lower conservation value forests.
- There is reduced market interest in stacked-loop trail networks and greater interest in shuttle-able descents for all abilities, jump trails and longer-distance wilderness-style trails.
- As trail volume across the State increases there is a demand for more trails at both ends of the difficulty spectrum; easy and difficult.
- There is a gap state-wide in the supply of easy and intermediate technical trails including hand-built trails with reduced construction impact and footprint but low risk to riders.
- Some trail managers and DPFEM identified a demand for more safe opportunities for rider skill progression.
- There is an opportunity to increase dispersal or stay through the development of introductory MTB experiences for non-MTB riders where there are existing demand drivers and visitor flows.
- There is often no clearly articulated specification or intention for many trails developed due to a lack of demand data and the understanding of proponents as to the best way to attend to rider demands.
- At trail network level there is not clear differentiation between trails from a planning or management perspective, but an understanding that there are differences between like wilderness, jump, etc.
- Some areas and networks are still encountering challenges resourcing ongoing maintenance and determining the best model to use for maintenance.

POLICY AND GOVERNANCE

- A consistent concern of Government trail managers is resourcing ongoing trail development, trail renewal and maintenance.
- There was some appetite for investigating other funding streams (State) for trail maintenance in recognition of the economic impact the trails provide for areas outside of the host LGA.
- The MTB market is evolving rapidly and the planning and approvals processes for trail development can lead to outdated concepts and products being pursued despite an understanding that the opportunity has passed.
- There was frustration among some trail development proponents with assessment, approvals and bureaucracy though the cause of frustration varied. This was true among MTB business operators as well as trail development proponents.
- There is uncertainty around what assessment process (FPP, RAA, DA etc) trail proposals are required to address and what the requirements of each process are.
- There is a recognition that the different objectives of proponents and permitting authorities can lead to different perceptions and expectations around the importance and prioritization of MTB development. This has manifested particularly around the infrastructure development required to host high-profile International events and has led to political intervention to expediate processes.
- There is misalignment between the objectives of PWS who license operators and Councils who operate the trail networks that the operators use.
- Funding has been lost by some destinations unable to navigate assessment and approvals within the timeframe required by funding partners.
- While some 'destinations' are not attracting the same visitation as BlueDerby and MBP, a second tier of MTB destinations that do not attract riders from outside the state can increase the stay of visitors brought to the state by Maydena and Derby.
- There is an understanding that differentiation through some characteristics is necessary between trail networks even if the target market is 'broad' to be complimentary. If networks offer the same experience and are poorly differentiated, they are competing for riders time.
- There is a desire within the trail industry to have more detail in procurement that prescribes the trail scale including tread and corridor width as well as other attributes that impact construction cost (density and type of features) to ensure that companies are tendering on and will deliver equivalent outcomes.
- There are always political influences that can reduce the impact of evidence or trail industry advice when defining the direction of a development. This has resulted in imitation of successful examples rather than development of unique and complimentary trail products.
- There is increasing understanding of the demand for shuttle access of trail networks.
- There is no assurance of a minimum standard of service from shuttle, guiding or tour operators due to the novelty of these activities relative to the PWS permit system. There are currently operators undertaking activities outside their permit conditions.
- There is a proliferation of shuttle operators in BlueDerby because there is no limit to the number of licenses that can be granted and public access to the shuttle road.

RISK MANAGEMENT AND SAFETY

- MTB trail development has led to an increase in demands on emergency service in the context of a strained health system.
- There is a lack of dialogue between DPFEM and trail managers about incidents and incident patterns, with both trail managers and emergency services amenable to improving this.
- There was an unwillingness of some destinations to acknowledge the demand on emergency services created by certain trails while other destinations have well developed protocols to address hazards and incidents.
- There is a widespread understanding that jump trails account for greater numbers of injuries per rider movement than other trail types though they are also one of the most popular trail styles. These trails also attract higher volumes of riders and require higher maintenance inputs.
- There has been a lack of consideration of the impacts on emergency services in planning with little consideration given to local emergency services resources.
- There are clear opportunities to engage with visitors to improve understanding of the risks related to MTB and remote areas prior to riding.
- DPFEM wish to be engaged during infrastructure design to ensure proponents understand their needs or have available a guide describing requirements for access and operation of emergency services.
- There is some uncertainty amongst development proponents about who is responsible for emergency management related to trail networks ie should it be done by the proponent of DPFEM?

MARKETING AND COMMUNICATION

- There is awareness that as our product offering increases and diversifies, effort must be invested in getting the right riders on the right trail through honest, informative marketing that recognises the different products we have and the different market segments they service.
- There are opportunities for integration, co-development, and co-marketing with complimentary products particularly hospitality.
- There is recognition that communication, marketing and branding has been and, in some cases, continues to be ineffective and inauthentic due to proponents engaging advertising agencies. As MTB and the culture around it is particularly esoteric activity, inauthentic content is immediately obvious to visitors.
- There was some agreement that it would be desirable to build on the Trail Classification System develop a more simplistic market facing classification system to allow visitors to differentiate between products and communicate consistently to market.
- There is a perception that while we have market leading product Tasmania may lose ground relative to other states due to their strong marketing investment.
- Aggressive marketing of MTB product to the wrong market can damage the Tasmanian MTB Brand. This may be attributed in some cases to developments that have been funded to increase visitation but for a range of reasons are better suited to local, recreational use.

RESEARCH AND DATA

- Aside from St Helens and Maydena Bike Park there is no robust knowledge derived from survey or data collection around actual visitor numbers, attributes and behaviours.
- There is a strong desire amongst local government areas for economic impact studies to support further funding requests and increase or maintain community support.
- There is strong demand for more data describing MTB visitor behaviour while they are here.
- There is varying willingness for trail managers to share trail count data with some reluctant to share information due to fear of misinterpretation.
- There is a recognition among operators that different trails and destinations are attracting different visitors though due to the lack of data there is only anecdotal evidence to support this.
- MTB operators report MTB visitors also undertaking iconic walks during visits.
- There is recognition of the importance of ride in/ride out experience for some riders and some types of trails predominantly those that wish to base themselves in one destination/network.

Pestel Analysis

A PESTEL analysis provides a structured approach to considering the range of factors that may influence Tasmania's success as a MTB destination into the future.

The factors included in the PESTEL analysis are the product of engagement with the Working Group, consideration of existing data and observation.

Politics

- The failure of some proposed destinations to achieve the anticipated increases in visitation has led to some cynicism and reluctance to support future proposals and further development in successful destinations.
- Political instability over several years in the North East has contributed to an uncertain environment for investment and slowing the rate of trail development that has led to its success.
- Ambiguity in procurement and trail specification has allowed manipulation of process and outcomes.
- Increased demand on Emergency Service and Healthcare system attributable to increased participation and visitation may impact political and community support for further development.

Economy

- Change in prevailing economic climate and reduction in discretionary spending in some sectors may lead to less MTB destination travel.
- There is a lack of large-scale funding initiatives that Tasmanian trail proponents can access to resource new developments or redevelop existing trails while funding secured by mainland destinations is enabling significant development, Bushfire Recovery etc.
- Large-scale trail developments based on trail volume rather than quality trail experience creates a large maintenance and therefore cost burden.
- The precedent set by public free-to-access trail developments disincentivises private development of trail experiences and has created an expectation that access to MTB trails should be free.

Society

- Perception of trail proliferation by broader community and lack of investment in other recreational activities may reduce support for further MTB development or investment in redevelopment/evolution within existing destinations.
- Increasing scale/footprint of individual trails and ingress into new areas is increasing environmental concern in some communities and interest groups.
- Participation in MTB and the MTB community has increased in size due in part to the accessibility of quality trail infrastructure. Strong riding communities will be more active seeking funding for further development and increase the attractiveness of an area for visiting riders.

Technology

- Increasing use of E-bikes may reduce the appeal and viability of marginal (low elevation range or undulating trails) shuttle products and require more direct climbing trails, ie further specific trail development.
- Trail networks will generally need to adapt to an increase in E-bike use.
- Evolving marketing and communication technologies will require changes in approach to achieve engagement with potential visitors.

Environment

- Tasmania's diverse, unique, high quality natural environments remain conducive to trail development of unique trail experiences close to communities.
- The increasing footprint of trails in some destinations and natural settings may lead to greater opposition to further trail development.
- Ingress of trails and MTB further into intact environments, without appropriate measures can increase the spread of weeds and soil borne pathogens.

Legislation

- Tasmania offers legislation in the form of Acts and Plans that is conducive to trail development across a broad range of tenure.
- Timber supply quotas and contracts require availability of PTPZ and due to the demonstrated incompatibility of harvesting activities and MTB tourism these areas will not be available for trail development without legislation or policy revision.



Where do we
want to go?

Revisiting a Vision for Tasmanian MTB ↙

The Tasmanian Mountain Bike Plan 2009 (the Plan) proposed a vision for mountain biking in Tasmania:

“Tasmania will provide a world-class, diverse range of outstanding mountain bike riding experiences showcasing Tasmania’s natural environment to entice local, national and international riders, where the network of trails and facilities are managed on a sustainable basis with the support of land managers and riders.”

Consensus within the project Working Group was that while awkwardly expressed, the existing vision adequately captured the elements of a sustainable MTB tourism industry for Tasmania.

The Plan was developed nearly 15 years ago, at a time where there were no Tasmanian MTB destinations, few sanctioned MTB trails and MTB use in Reserved lands was not widely supported. The vision was presented to reflect both local recreational and MTB tourism activity. Now MTB is a legitimate recreational activity with trails of all purposes across many Reserve types and tenure classifications and our MTB tourism product is nation leading. As such, the support of land managers has been demonstrated and less relevant into the future.

The following is proposed as the vision for MTB tourism in Tasmania:

“Tasmania will provide a sustainable, diverse range of unique mountain bike experiences that support communities and compel visitors to enjoy Tasmanian environments through trails.”

It reflects the 4 key tenets of Tasmanian MTB tourism:

Sustainable: Our MTB tourism product must be sustainable in every sense:

- **Environmentally sustainable.** MTB tourism must provide a net environmental benefit. The ways this can occur is through MTB providing economic opportunities that are less impactful than the other ways areas may be used, by providing visitors and Tasmanian residents the opportunity to recreate in Tasmanian natural environments and developing an appreciation of natural places that may be reflected in policy.
- **Economically sustainable.** MTB tourism must provide net economic benefit where the costs of development, maintenance, management and re-development are met by visitation or its effects.
- **Socially sustainable.** MTB tourism must benefit and be appreciated by host communities, conserve our culture and ensure impacts of visitation are positive.

Uniquely Tasmanian: Our MTB product will be based around uniquely Tasmanian environments and cultural experiences. This will assure our MTB experiences are unique internationally and cannot be replicated by our competitors.

Based on the experience of Tasmanian environments: Trail experiences should provide MTB visitors the opportunity to experience Tasmanian natural and cultural environments through trails. This includes not only the natural environment but historic and contemporary cultural experiences including our produce, food and hospitality offerings.

Diverse: We will offer MTB experiences that complement each other not compete. This will be with respect to the riders and market sectors that they appeal to as well as the range of experiences they provide.

Competitive Landscape ↙

Summary

Tasmania is regarded as Australia's market leader in MTB tourism offering due to the success of BlueDerby and Maydena Bike Park supported by a range of other destinations.

High quality trails in unique Tasmanian landscapes have played a key role in this but it would be naïve to ignore the role that the rapid and widespread development of trails; outpacing other States has played. Tasmania has demonstrated the potential of MTB tourism to provide economic benefit to regional communities and now there are many aspiring mainland destinations, some with genuinely unique propositions in development.

There are hundreds of kilometres of trails open, under development or planned and funded, particularly in Victoria and NSW that will increase competition in the national destination market and while it is expected that the visitor market will continue to increase in size, the vast number of developments will certainly increase competition and disperse visitors across a larger number of destinations..

To maintain or enhance its market position Tasmania must continue to develop the unique trail experiences that cannot be replicated in other areas.

The most significant trail destinations existing or in development include:

Victoria

WARBURTON.

177km of trail proposed and in development though construction has not commenced. Warburton will be constructed by World Trail and offers some similarities to the environment of Derby though across a greater elevation range. The trails will be serviced by an existing town with a strong hospitality offerings 90 minutes from Melbourne.

HIGH COUNTRY.

Ten existing MTB trail areas totalling hundreds of kilometres and many road, rail-trail and gravel routes distributed across the Victorian Alps. There are a broad range of trail experiences across this region from the popular community driven destination of Bright to the resorts of Mount Buller and Falls Creek. The recently developed 56km Indigo Epic (noting this is not an IMBA epic trail) Trail linking the towns of Yackandandah and Beechworth diversifies the trail experience by providing a longer distance MTB opportunity between two well serviced towns and is similar in concept to the Bay of Fires and Blue Tier trails. Ongoing Government investment and marketing of this region is aggressive with support totalling \$4.4 million.

OMELO.

120 km of trail currently in development to the East of the Victorian Alps 30 minutes from the minor High Country trail network of Dinner Plains and under 2 hours from Bright. It is explicitly positioned to attract visitors that are already visiting the High Country by providing shuttle access to the large elevation range adjacent to the town and longer distance trail riding.

CRESSWICK.

Stage One of 100km total currently under development. Cresswick was intended to be the MTB venue for the 2026 Commonwealth Games. Though the Games have been cancelled, the trail construction will still proceed. Given the focus of the Cresswick development was as an event venue it is not clear how effective it will be attracting visiting riders.

FORREST.

Located 2hrs west of Melbourne, Forrest was arguably the first large scale Australian MTB development pursued to provide economic opportunity for the local community in the early 2000's. The trail offering at Forrest has since been surpassed by many other developments and visitation has reduced significantly. Forrest recently received funding to redevelop and expand the network with the explicit aim of again being a nationally significant MTB destination. Forrest does suffer significant limitations in the lack of elevation and geology the trail network involves but these factors also enable it to provide for beginner riders which is significant given its location so close to the population of Melbourne.

New South Wales

MOGO.

155km of trail currently under construction. This trail network builds on the small volume of existing trails and through a sprawling stacked loop network will enable a longer distance, gentle descent from the peak of a local mountain to the township of Batemans Bay.

EDEN.

A 56km network of gravity trails has recently been completed and is awaiting opening. Eden offers over 300 metres of elevation and like the other South-Coast NSW aspiring MTB destinations is a town already servicing large numbers of visitors.

THREDBO/JINDABYNE.

Thredbo is one of Australia's most established MTB destinations as offers Australia's only consistent, lift-accessed riding. While the trail network in Thredbo itself is not that extensive due to constraints related to its location in Kosciusko National Park, it attracts vast numbers of visiting riders due to the unique in Australia, lift-accessed, gravity riding (detailed data is not available due to commercial sensitivities). Thredbo also offers the Thredbo Valley Trail which allows riders to descend gently for 37km gently from Thredbo toward Jindabyne, along the Thredbo River.

NAROOMA.

65km of trail has recently been added to the existing, locally developed trails to provide close to 100km of trail riding. Positioned between the soon to open Eden Gravity trails and Mogo, Narooma hopes to leverage its location relative to other riding destinations and it's sea-side location and existing tourism products.

ORANGE.

A 104km trail network is proposed on Mount Canobolus and is currently seeking planning approval from the State Government. The proposed capital investment is in excess of \$10 million dollars with the express intention of 'drawing enthusiasts from all over Australia' though it will be easily accessible from the major population centres of NSW. The site offers over 500m elevation range and an existing road that may be used for shuttle access.

Queensland

ATHERTON.

Atherton predates all of the Tasmanian MTB destinations and was also constructed by World Trail who are responsible for the BlueDerby, St Helens and George Town networks in Tasmania. Through juxtaposition with BlueDerby, Atherton (who has not enjoyed the same level of success) can offer some insights into what is required to achieve success as an MTB destination.

EUNGELLA/FINCH-HATTON.

Located less than an hour from Mackay this development involves two towns in the Pioneer Valley. The development involves a trail network extending from Finch Hatton into the surrounding hills and include a full range of trail styles including trails developed to World Cup standard as well as a wilderness trail linking the two towns suggested to provide 1500m of descending over its 36km length. The strength of the natural setting, elevation opportunity, proximity to Mackay and the range of trail proposed are likely to make this development successful.

WANGETTI TRAIL/CAIRNS.

Cairns has a strong riding community and culture though offers a limited number and style of trails. It has hosted many high-profile international events including World Cups, World Championships and Crankworx and will host the UCI Masters World Championships in 2024.

The Wangetti Trail is slowly approaching construction and will extend from Palm Cove, just north of Cairns to Port Douglas. It is proposed as a shared use trail that will accommodate both walking and mountain biking and will be 94km in length when completed. The former Queensland Tourism Minister stated "The Wangetti Trail will rival anything Tasmania has when it comes to ecotourism." though changes to the trail alignment now locates more of the trail within developed areas. This will reduce the quality of the experience and has impacted support for the project across the local government areas through which it passes. Despite this, the trail will traverse areas of great natural value including two National Parks and WHA₄₉



How do we
get there?

Existing Plans and Strategies ↙

There are a range of existing strategies that are intended to guide the direction of MTB trail development in Tasmania or our visitor economy of which MTB tourism is a part.

The last comprehensive, state-wide, MTB specific, strategy was the Tasmanian Mountain Bike Plan. As discussed elsewhere in this document, it preceded the development of any MTB trail infrastructure intended to attract MTB visitors to Tasmania. The need to develop a contemporary State mountain bike strategy, covering recreational and tourism activities is demonstrated through the isolated, independent approach to trail development that has occurred in recent years.

Some regions have strategic plans or have identified opportunities for MTB trail development, the West Coast and MBP. Notably BlueDerby does not have a plan to guide further MTB product development though it has been identified by Dorset Council as a priority.

It is acknowledged that other local government areas have undertaken work to identify MTB opportunities within their municipalities, but these are primarily focussed on attending to local recreational demand.

Tasmanian Mountain Bike Plan, 2009.

The Tasmanian Mountain Bike Plan is the only comprehensive, state wide MTB strategy and was written prior to the establishment of any of the current MTB destinations in Tasmania. It was developed by Inspiring Place and Dirt Art for Sport and Recreation Tasmania to ‘*provide a framework for the coordinated development, management and marketing of mountain bike opportunities in Tasmania*’ and arose in response to the observed increase in popularity of MTB and the understanding of the need to provide and formalize recreational trails for Tasmanian mountain bikers and the potential to develop or promote MTB experiences as tourism products.

The Plan contained several key components including the first Vision for Tasmanian mountain biking, a characterization of the ‘destination mountain biker’, a hierarchy of trails and a range of recommendations oriented around achieving the Vision. It is important to note that the Plan was equally concerned with satisfying local recreational demand as it was supporting the development of MTB tourism products.

While many of the specific recommendations that the Plan contains do not reflect current participation and visitation, the hierarchy of trails it recommends remains a valuable lens through which to consider the development of trails for specific purposes and through which to assess the success of trail development relative to its objective.

The TMTBP proposed what at the time was a very useful ‘hierarchy’ of MTB trails ranging from potential IMBA epics (a status awarded by IMBA for iconic trail experiences), Iconic Wild Rides, MTB adventure Centres, Regional MTB Trail Hubs and Bike Parks to Local MTB trails. Similar hierarchies are now consistently used to classify trail developments based on their intended function and market. These are discussed specifically and an updated hierarchy proposed later in the Report.

The hierarchy can be summarized as follows:

- *Potential Epic Rides*: The trail experience nominated by the Tasmanian community and endorsed by IMBA as an EPIC ride.
- *Iconic Wild Rides*: World-class trail experiences located within the wild landscapes of Tasmania.
- *MTB Adventure Centres*: Remote locations with the potential to provide a service base for riders to access a diversity of high quality adventure MTB trails.
- *Regional MTB Trail Hubs and Bike Parks*: Trail networks offering higher quality experiences than those available to riders in their immediate area.
- *Local MTB Trails*: Trails proximate to population centres intended to satisfy local recreational demand.

At the time of the Plan’s writing in 2009 there were no clear examples of what composed a successful Tasmanian MTB destination or MTB tourism trail product and the primary function of the hierarchy was to set out how trail infrastructure would lead to it satisfying particular demands ranging from attending to local recreational need to attracting visitor riders. Many of the specific criteria are now redundant as the provision of MTB trails has increased and improved with a corresponding increase in the standard and competitiveness of the destination market. An updated version of the hierarchy is provided earlier in this document.

Most interesting in the Trail Hierarchy is that the types of trails expected to be epic or iconic were all stand-alone, longer distance point to point rides; essentially MTB equivalents of Great Walks, rather than trail networks which by definition would have been ‘MTB adventure centres’. So, even at this time there was an intuitive understanding of the types of products that visitors to Tasmania wanted; that is engaging trail experiences in high quality Tasmanian environments. The little data that exists does support this expectation.

The rationale for differentiation between Tiers in the plan is largely based on the strength of the environmental setting and quality of the trail dynamic with secondary reference to trail volume which remains a sound approach.

The characterization of the destination mountain biker provided in the Plan contains also remains surprisingly accurate given the significant change and development in trail and bike technology that has occurred over time.

Tasmanian Cycle Tourism Strategy, 2017.

The Tasmanian Cycle Tourism Strategy was written by the Department of State Growth and seeks to “identify priority opportunities that can deliver on the Tasmanian Visitor Economy Strategy 2015-2020 goals and drive Tasmania toward being Australia’s best cycling destination.”

The Strategy considers various cycling disciplines relevant to cycle tourism and makes specific though high-level recommendations.

The Strategy also includes a summary of participation and visitation at the time of its development derived from various sources.

Mountain Bike Trail Strategy. West Coast, Tasmania, Dirt Art, 2019

The ‘Mountain Bike Trail Strategy’ was developed by Dirt Art for West Coast Council to guide the development of MTB trail infrastructure required to establish the West Coast as a MTB destination. It asserts the importance of trail developments being unique in a national context and the importance of providing riders with access to the range of iconic West Coast environments through trails.

It was released during the development of the Mount Owen trails and identifies and prioritises future trails developments required to consolidate the West Coast as a MTB destination. It sets out four future directions:

- Trails in the Heemkirk Regional Reserve that have since been constructed.
- Backcountry riding with options for overnight routes in recognition of the lack of this style of product, its demonstrated success in other countries and the tenure and topographical advantages the West Coast offers in developing this kind of product.
- Further trail development on Mount Owen to improve connectivity and trail diversity.
- Trail development that integrates existing or potential non-MTB tourism offering including the Wilderness Railway and King River Rafting

Five Year Masterplan, Maydena Bike Park, 2023

The Five Year Masterplan outlines the strategy required to ‘establish MBP as one of Australia’s leading eco and adventure tourism operations, and one of the worlds leading mountain bike destinations.’

The plan contains the infrastructure and product development goals for years 6-10 of the Parks operations shaped by consultation and market analysis. It:

- Identifies MBP USP’s including its location, elevation, low-housing cost and significantly its operational stability and responsiveness attributable to its private operation and business model.
- Reports the market demand for more maintenance of flow/jump trails, noting that MBP’s jump trail offering is amongst the most frequently maintained in the State which demonstrates the maintenance demand and cost of these kinds of trails and their potential incompatibility with public funded settings.
- Identifies demand for more intermediate jump trails.
- Describes the infrastructure responses required to maintain or enhance MBP’s position including; more trail riding, more beginner trails, another DH race track and testing facility, improved trail connectivity, increase in intermediate and advanced jump trails.
- Indicates preliminary planning is underway for chairlift/gondola uplift within the Parks freehold boundary.
- Identifies demand and identifies opportunities to increase local accommodation capacity including camping options.

Feasibility Assessment Framework ↙

The Feasibility Assessment Framework provides a structured and consistent approach to determining the potential of a trail development proposal and its alignment with the proposed vision for Tasmanian MTB. It has been developed by the Mountain Bike Network - Tasmania and is made available to any organisation or individual looking to develop mountain bike trails.

While not intended as a formal assessment process, it may be used or adapted by Government agencies within existing or statutory assessment processes as a consistent way to demonstrate the value and feasibility of a proposal.

The Framework is made up of a weighted attribute scoring matrix and scoring guide.

The attributes included in the matrix impact the economy of trail development and maintenance, the quality of visitor experience, the competitiveness of MTB product in the domestic market and the benefit provided and support of host communities. These have been determined through observation, research and consultation with the project Working Group composed of trail industry representatives, land managers, trail managers, business operators and tourism organisations involved in the development, management and promotion of MTB product in Tasmania.

The Feasibility Assessment Framework is broken down into:

- **ATTRIBUTES:** The broad categories of attributes that influence MTB product feasibility.
- **VARIABLES:** The variables that collectively establish the attributes that define MTB product feasibility.
- **DIMENSIONS:** Specified where a higher level of resolution and consideration of further factors is required to score variables.

While the Framework has been designed to help organisations assess the feasibility of MTB development proposals, it can also be used to compare alternative development locations for the same product or alternative concepts within the same location.

The Framework is intended to help organisations assess the value of a proposal in attracting or retaining visitors, but the matrix can easily be adapted to assess proposals for local or regional recreational developments. Similarly, while the attributes, variables and dimensions included in the Framework all influence a development's feasibility, there are foreseeable situations where a proponent or assessor will have sound reasons to omit or include additional factors or adjust attribute weightings.

The Framework reflects an understanding of MTB product held at the time it was developed. It should be revised and updated as the destination market changes and as the understanding of the factors influencing a development's feasibility improves.

Recommendations and Actions ↙

The recommendations and actions accompany the Executive Summary at the start of this document.

Terms and Abbreviations ↙

All-mountain	A non-competitive MTB discipline where riders seek engaging, technical descents and either pedal or shuttle to the top of trails. Often used interchangeably with Enduro.
aMTB	Adaptive mountain biking.
Auscycling	The National Sporting Organisation encompassing all cycling disciplines. It incorporates and supersedes MTBA the former National Body for MTB.
Closed-loop	A trail format where multiple descents are accessed by a one or multiple climbing trails, often with a shuttle option.
DPFEM	The Department of Police, Fire and Emergency Management.
E-bike	A bike with an electric motor that in Australia, provides the rider with assistance up to 25km/h and with a maximum power of 250W. Assistance is proportional to pedal input from the rider rather than using a throttle.
Enduro	The most popular mountain bike discipline and competitive event that best reflects the way most mountain bikers approach mountain biking. Riders ascend to the top of descending trails using either climbing trails, shuttling or lifts.
EWS/EDR	Enduro world series and as it is now known after UCI assumed control of the series Enduro World Cup. The peak, global enduro competition.
FAF	Feasibility Assessment Framework. The feasibility assessment method supported by this Plan.
Freeride	A broad mountain bike discipline oriented around any combination of technical descents, natural and constructed technical features, jumps and style.
Gap/Gap Jump	A jump where the rider must leave the ground and jump between the take-off and landing.
Hip/Hipped Jump	A jump where the take-off and landing are not directly aligned. This requires a rider to turn up the take-off and often reorient their bike in the air to align with the landing. Suitable for advanced riders.
IMBA	The International Mountain Bike Association. The peak, international body for mountain biking with a focus on trail development, standards and advocacy.
MBP	Maydena Bike Park
MTB	Mountain Bike
MTBA	Mountain Bike Australia. The former National Body for MTB which amalgamated with BMX Australia and Cycling Australia to form Auscycling in 2020.
MTBN	The Mountain Bike Network – Tasmania. The peak industry body representing the MTB tourism industry of Tasmania
Roll-able	Able to be traversed by a rider without leaving the ground. Usually referring to jumps but also drops.
Shuttle/Shuttling	Where riders use vehicles to access the high points of descending trails rather than climbing on trails.
Slopestyle	A competitive mountain bike discipline where riders style is judged through a 'run' where they navigate technical features like jumps, drops, and timber features.
Stacked-loop	A trail network configuration where loops are arranged to provide less difficult and physically demanding trails close to trailheads or access points and where other loops adjoin and increase in difficulty with distance from the trail head.
TCS	Trail Classification System. The approach to classifying trails based on their attributes proposed in this Plan.
TDR/TDRS	Technical difficulty rating/system. The rating of the technical demands of the trail through the Auscycling/MTBA system or IMBA frameworks noting that there are minor differences between each.
TMTBP	Tasmanian Mountain Bike Plan 2009
Trail dynamic/ trail style	The component of MTB experience that involves what it is like to move along a trail. The trail dynamic is determined by the trail profile, trail surface the interaction of these factors with the rider.
Trials	A mountain bike discipline where riders navigate obstacles at low speed aiming to avoid the need to place feet on the ground. Usually involves highly modified specialist bikes that are unsuitable for other uses.
UCI	Union Cycliste Internationale. The global governing body of cycling.
Wilderness/ back-country trail	More remote, longer distance usually stand-alone trail experiences. Often point-to-point but may be a loop. Focus is on the setting or accessing natural points of interest rather than trail dynamic focus.
XC	Abbreviation for Cross-country. A mountain bike discipline that involves riding and racing trails that climb and descend with increased emphasis on physical fitness. Usually undertaken on short travel full-suspension or front suspension mountain bikes.

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