

George Town Mountain Bike Proposal Economic Analysis

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Introduction

Tasmania is experiencing a mountain bike (MTB) boom with visitor numbers increasing, new businesses opening and several new trails under construction across the state. To help fuel the enthusiasm for mountain bike tourism, frequent media articles proclaim that mountain biking is a panacea for underperforming regional economies. There is a growing perception if large volumes of high-quality trails are built, visitors will follow.

Since 2017, work has commenced on a proposal for visitor-focused MTB trails in land adjacent to the township of George Town. Initial indications for a trail network in the George Town area are positive. Two trail feasibility reports have been prepared for the George Town Council (GTC) to assist in the preliminary planning for the facility. There reports are:

World Trail. (2017). *George Town Site Visit Report*. George Town Council.

Dirt Art. (2018). *George Town Mountain Bike Feasibility Study*. George Town Council.

The Dirt Art report (2018) is a more detailed study that provides conceptual trail alignments for approximately 110km of trail. Two stages of trail development have been proposed; a first stage of approximately 70km and a second stage of approximately 40km. The report also includes feasibility analysis, projected rider volumes and an estimated economic impact.

In December 2018, The GTC commissioned further analysis to clarify the possible impact of George Town MTB (GTMTB) proposal as outlined by Dirt Art. Additional independent analysis has been requested to:

1. Position the proposed facility relative to existing and proposed Tasmanian MTB facilities
2. Briefly review existing research and data related to mountain bike tourism and current market conditions in Tasmania
3. Develop scenarios to demonstrate the likely economic impacts of MTB facilities to the George Town area.

This report is not designed to be an in-depth market analysis nor is it a critique of the existing assessments conducted by Dirt Art (2018). It is a broad assessment of the GTMTB trail proposal using Multi Criteria Analysis and Scenario Analysis to provide an overview of the project's potential to deliver tangible benefits to the George Town area.

This report demonstrates there is strong potential for the facility and reinforces the Dirt Art findings but also indicates that trail alone do not make a successful MTB destination.

Background

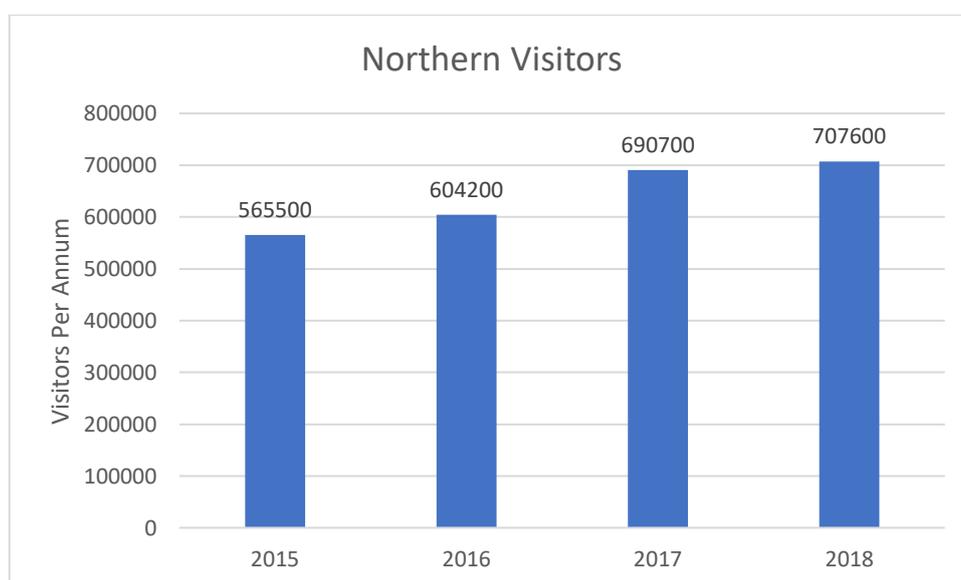
The Dirt Art Feasibility Study (2018) outlines a trail network of approximately 110 kilometres of purpose-built trail to provide additional economic activity and recreational facilities to the George Town area. This proposal represents a significant investment in trail infrastructure (up to \$4.4M) as well as a commitment to long-term maintenance and management of these trails.

Whilst the logic behind this proposal is based on precedents such as the successful Blue Derby trails, the GTC is seeking to better understand the likely impact of this infrastructure on the local economy. Initial estimates of rider volumes and economic impact provided by Dirt Art (2018) are based on preliminary analysis of the site, early-stage trail concepts and a basic assessment of the market opportunity. Initial projections (Dirt Art, 2018) have forecast the potential annual impact of up to \$6.4 million in direct expenditure from a potential 40 000 riders per year from 110km of trail.

Initial findings from research and stakeholder consultation conducted for this report confirm there is genuine potential for the proposed trail network as well as substantial community support behind the concept. There is also a need to be realistic about the strengths and weaknesses of the GTMTB proposal relative to existing and proposed trails in Tasmania.

Tourism Demand

The overall picture for tourism demand in Tasmania is positive. Tourism Tasmania data shows that tourism demand in Northern Tasmania is strong with annual rising from 565 500 in 2015, to 707 600 in 2018 (Tourism Tasmania, 2019).



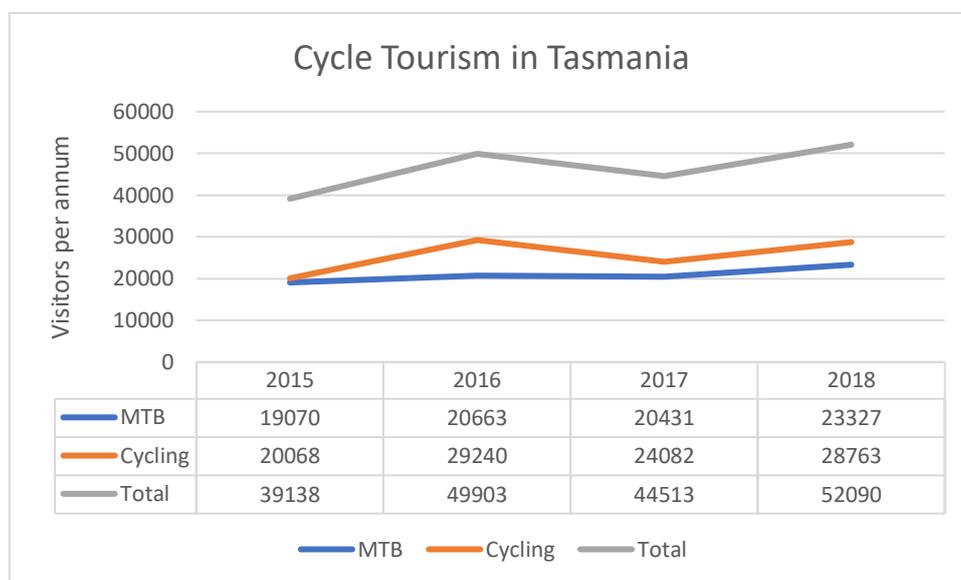
Other demand indications are also strong. Between 2016 and 2018...

- Visitation to George Town: Up from approx. 80 000 to 85 000
- Overnight stays in George Town: Up from approx. 12 000 to 17 000
- Tamar Valley Touring Route Visitors: Up from approx. 123 000 to 131 000

* (Tourism Tasmania, 2019).

Cycle Tourism

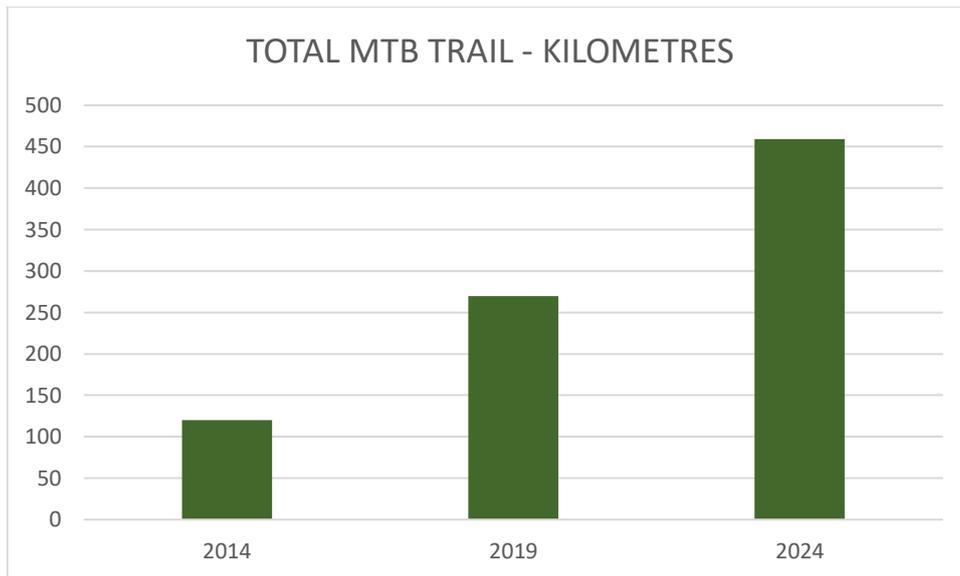
The overall picture for cycle tourism is also positive. Between 2015 and 2018, visitors that engaged in MTB activity is up 18%, other forms of cycling up 30% and total cycling activities are up 24% (Tourism Tasmania, 2019).



MTB Infrastructure

Prior to the development of the North Eastern Mountain Bike Project in 2014 (encompassing Hollybank, Derby and Blue Tier), Northern Tasmania had a distinct lack of suitable MTB infrastructure to encourage any significant growth in mountain bike visitation from interstate or overseas (Six Dot Consulting, 2011). Whilst there were existing “back country” trails and local riding facilities in areas like the Blue Tier, this infrastructure was not necessarily targeted at visiting riders.

Five years on, and this situation has altered significantly. Tasmania is experiencing a boom in the construction of MTB trail infrastructure. This follows the rise of MTB as a recreational pursuit as well as the increased number of tourists that MTB whilst visiting Tasmania. The quantity of high-quality purpose-built trail in Tasmania has more than doubled between 2014 (~120km) and 2019 (~270km). Total trail distance is forecast to reach almost 460km by 2024.



For areas looking to develop new trail proposals, this increased supply of MTB trail is a double-edged sword. More trail in Tasmania helps to create a critical mass of trail experiences. But it also creates competition for the attention of local riders and visitors with an ever-increasing range of riding options and choices. Therefore, new MTB infrastructure developments must have a clear point of difference to attract new visitors to Tasmania to prevent the dilution of the market for existing trails (TRC Tourism, 2016).

George Town Proposal

Since 2017, work has been undertaken to develop concept plans for MTB trails in the George Town area. Two initial assessments have been commissioned to assess the feasibility of trails in the areas surrounding the township. These studies have largely focused on the technical feasibility of trail construction and NOT the market feasibility of the trails.

Initial research and assessment demonstrate that the GTMTB proposal has strong potential. The proposal comes at a time when tourism demand is strong and MTB visitors are increasing. The individual strengths of the GTMTB proposal include:

- Preliminary designs completed
- Favourable building conditions
- Excellent supporting tourism infrastructure in the George Town area
- Views across Port Dalrymple and the northern coast of Tasmania
- In-principle landowner support
- Strong indications of support from local businesses.

(TRC Tourism, 2013)

The initial GTMTB trail concepts have been reviewed against MTB infrastructure assessment criteria developed for Northern Tasmania Development (NTD) in 2011. This assessment process was used by NTD to prioritise the development of MTB trails in the Northern Region of Tasmania and attract funding for trails (Six Dot Consulting, 2011).

The results of this multi criteria analysis is contained in the appendices. This comparative analysis highlights key areas of differences of the GTMTB proposal compared to the successful Blue Tier/Derby location. These differences highlight areas of risk (uncertainty) that influence the projected rider volumes and the profile of visitation for the GTMTB trails.

Areas of risk include:

- Landowner Support: Discussions have occurred with landowners for 'in principle support'. However, no formal approvals processes have begun. The final support of land owners will be contingent on additional trail planning, negotiations (e.g. lease arrangements) and approvals. The trails cover several different land tenures.
- Planning: Initial site visits have been completed and two reports have been completed by specialised MTB trail building companies. However, trail designs are concepts only. Further “ground truthing” activities are required before final alignments can be submitted for approval or market assessment.
- Community and Rider Support: There is some strong support from the local community including the local Chamber of Commerce, major industry and education facilities. A recent community consultation (7 February 2019) attracted significant attendance in support of the concept. However, limited formal engagement has occurred with local or regional rider groups (such as the Launceston MTB Club).
- Market Appeal: The proposed trail area contains several attractive features including panoramic views of the north coast and Tamar Estuary. Compared to other iconic the trails in Tasmania (such as Blue Derby and Maydena) the GTMTB area lacks the wilderness appeal that is a major drawcard for visitors to Tasmanian trails (TRC Tourism, 2016). Further market research would clarify the “point of difference” and market appeal for the area and trail designs.

- Existing Trails: There are no significant or formalised existing trails for mountain bike riders. Whilst the proposal is aimed at developing new purpose-built trail, initial promotional efforts will need to focus on creating an awareness of the area as a riding destination whilst leveraging existing and proposed trail networks such as Blue Derby.

Trail Hierarchy – Local, Regional and National Significance

In recent years, the growth rate of MTB trails quantity in Tasmania has greatly outgrown the growth of cycling visitors. It is estimated that by 2024, the quantity of high-quality purpose-built MTB trail in Tasmania will be around 460km; over double the current trail volume.

New MTB developments need a point of difference to grow the overall cycling market rather than cannibalise the existing visitation from other locations. The Tasmanian Mountain Bike Plan (Sport and Recreation Tasmania, 2009) proposed a Trail Hierarchy to assist in the categorisation, promotion and management of trails. The value of a trail hierarchy is:

- *the relative significance of different MTB riding experiences can be identified*
- *rides can be better positioned, developed and maintained to the differing needs and expectations of international, interstate, intrastate and local riders*
- *priority can be assessed for those MTB trails that offer the best ride experiences for the different types of riding, allowing prioritisation of funding allocation*
- *the ability to more clearly market and promote the different MTB ride experiences to the intended market segment*
- *the ability to better identify and implement the most appropriate planning, development, management and maintenance requirements for the different levels of trails.*

(Sport and Recreation Tasmania, 2009)

This hierarchy suggests that not all trails need to be built and maintained as ‘world-class’ to be a useful and beneficial recreation and tourism asset infrastructure. It is important to target new investments in trail infrastructure according to the requirements of the target market, the capacity of trail managers and the characteristics of the trail environment.

The concept of a trail hierarchy is supported by international research. Renowned trail advocate and consultant, Dafydd Davis, proposes a similar method of categorising trail development (Davis, 2011). Davis outlines three categories of strategic (i.e. purposeful) trail development:

- Local
- Regional
- National.

In conducting this economic analysis, the GTMTB proposal is considered as Regionally Significant. This suggests that the trails:

- Will leverage existing interstate and international mountain bike visitors to areas such as Derby
- Will be a predominantly a day visit for the intrastate market but when however, when combined with other facilities it forms part of a larger tourism offering for the Region
- Will maximise connectivity with large Regional centres (e.g. Launceston and Devonport)
- Have 40KM+ in high-quality, purpose-built trail

Further details of these trail hierarchy systems are provided in the appendices.



Scenario Analysis

In developing economic impact scenarios for the GTMTB proposal, the following influences have been used to predict visitation and economic impact:

- Current levels of tourism demand and growth
- Characteristics of MTB-specific visitation
- The current and projected supply of visitor-focused MTB trails
- The strengths and weaknesses of the GTMTB proposal
- Projections developed for similar cycling projects in Tasmania.

Two scenarios are presented to give a range of likely outcomes for the GTMTB proposal.

1. Low (Pessimistic)
2. High (Optimistic)

The scenarios are based on the facility being a Regionally Significant trail network of 50km+ of high-quality MTB trails and associated infrastructure. This analysis is based on the successful completion of Stage One of the Dirt Art (2018) proposal totalling ~70km of trail at an estimated cost of ~\$2.8M.

Based on research and stakeholder consultations, the completion of Stage One would enable the GTMTB facility to be enough to create a network of MTB trails that would be of regional importance.

In summary, these visitation and impact scenarios are:

	Local Riders	Intrastate Visitors	Other Visitors	Total Visitors	Direct Impact	Indirect Impact
Low	4,153	4,845	7,169	16,166	\$1,527,059	\$2,901,411
High	4,845	6,460	14,703	26,007	\$3,407,975	\$6,475,153

Low (Pessimistic) Scenario – 2024

This scenario outlines the potential impact of the GTMTB facility based on:

- A slowing of the current growth rate of MTB visitation to Tasmania from the current three-year average of 7% to 3.5%
- Moderate levels of engagement from Tasmanian, interstate and international riders
- Approximately 85% day-usage

	Local Riders	Intrastate Visitors	Other Visitors	Total Visitors	Direct Impact	Indirect Impact
Ride Only	3,322	1,938	2,151	7,411	\$0	\$0
Full Day	831	1,938	3,584	6,353	\$355,754	\$675,932
Single Night	0	484	717	1,201	\$468,522	\$890,192
Multi Day	0	484	717	1,201	\$702,783	\$1,335,288
TOTAL	4,153	4,845	7,169	16,166	\$1,527,059	\$2,901,411

MTB Visitor Growth Rate

- 3.5% per annum

Local Riders (Northern Region)

- 60% of all Local (Northern) MTB riders visit the trails
 - 80% of these local visitors ride only
 - 20% stay in the area for a full day
 - No additional overnight stays.

Intrastate Riders (Southern and North Western)

- 30% of Other Tasmanian riders visit the trails
 - 40% of these intrastate visitors ride only
 - 40% stay for the day
 - 10% stay for one night
 - 10% stay for multiple days.

Other Visitors (Interstate and International)

- 50% of total MTB visitors to Tasmania travel to the Northern Region
 - 50% of these riders visit the GTMTB facility
 - 30% of these visitors will ride only
 - 50% stay for a day
 - 10% stay overnight
 - 10% stay for multiple days.

High (Optimistic) Scenario - 2024

This scenario outlines the potential impact of the GTMTB facility based on:

- A continuation of the 3-year trend of MTB visitation to Tasmania 7% growth per annum
- High levels of engagement from Tasmanian, interstate and international riders
- Approximately 75% day-usage

	Local Riders	Intrastate Visitors	Other Visitors	Total	Direct Impact	Indirect Impact
Ride Only	3,391	2,584	4,411	10,386	\$0	\$0
Full Day	1,453	1,938	5,881	9,273	\$519,262	\$986,598
Single Night	0	1,292	2,941	4,233	\$1,650,693	\$3,136,317
Multi Day	0	646	1,470	2,116	\$1,238,020	\$2,352,238
TOTAL	4,845	6,460	14,703	26,007	\$3,407,975	\$6,475,153

MTB Visitor Growth Rate

- 7% per annum

Local Riders (Northern Region)

- 70% of all Northern MTB riders visit the trails
 - 70% of these local visitors ride only
 - 30% stay in the area for a full day
 - No additional overnight stays.

Intrastate Riders (Southern and North Western)

- 40% of Other Tasmanian riders visit the trails
 - 40% of these intrastate visitors ride only
 - 30% stay for the day and
 - 20% stay for one night and
 - 10% stay for multiple days.

Other Visitors (Interstate and International)

- 60% of total MTB visitors to Tasmania travel to the Northern Region
 - 70% of these visitors will visit the GTMTB facility
 - 30% of these visitors will ride only
 - 40% stay for a day
 - 20% stay overnight
 - 10% stay for multiple days.

Assumptions

It is acknowledged that the scenarios presented contain many assumptions. This is the nature of future projections. However, realistic assumptions have been made about the growth of MTB visitation, MTB participation, length of stay and rider expenditures based on numerous existing studies and research conducted over the last decade.

The focus of this report is to provide an accurate range of impacts for the proposal and to assist the GTC in making an informed decision based on the likely economic impact. Assumptions made in conducting this analysis are:

Accommodation Supply and Business Engagement: This analysis assumes that accommodation is available for visitors and that local businesses respond positively to the market opportunity.

Construction: It is assumed that construction of Stage One (~70km) is completed in mid-2022.

Employment: It is assumed that for every \$1,000,000 in direct expenditure, 11.4 jobs are created. This figure is consistent with other MTB research reports (TRC Tourism, 2013) and is based on Tourism Research Australia findings.

Indirect Impact: It is assumed that for every \$1 in direct expenditure, \$0.9 in additional indirect expenditure is created through supply chain effects. This figure is consistent with other MTB research reports (TRC Tourism, 2013) and is based on Tourism Research Australia findings.

Infrastructure: This assessment considers the GTMTB facility to be classified as Regionally Significant in line with the criteria outlined by Davis (2011).

Local Riders: It is estimated that the MTB participation rate is 4.2% of the population. There is a lack of current data on this participation rate. Anecdotally, this participation rate is between 3.5% - 5%. The population estimate for 2024 is taken from the Tasmanian Government projections (Department of Treasury and Finance, 2014).

	2018	2024
Tasmanian Population	528,097	549,283
MTB Participation Rate	4.2%	4.2%
Total Tasmanian MTB Riders	22,180	23,070
Northern Proportion of Total Tas MTB	30%	30%
Northern MTB Riders	6,654	6,921
Other Tasmanian MTB Riders	15,527	16,149

Mountain Bike Visitors: It is assumed that MTB visitors will grow at 7% per annum for the High Scenario and 3.5% per annum for the Low Scenario. Figures below are based on a 7% per annum growth rate based on the September 2018 TVS data (Tourism Tasmania, 2019).

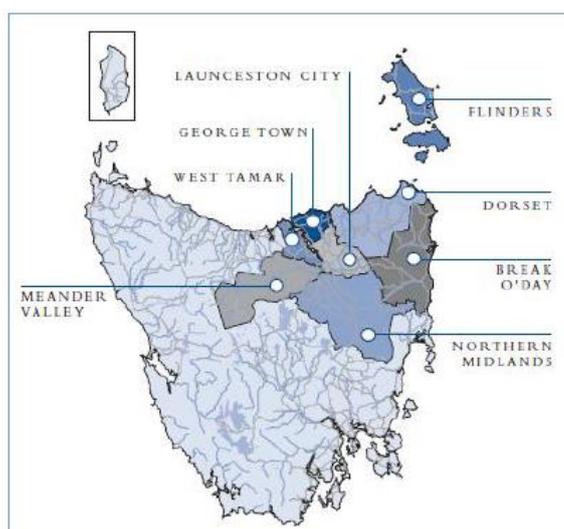
Year	MTB Visitors
2015	19,070
2016	20,663
2017	20,431
2018	23,327
2019	24,960
2020	26,707
2021	28,577
2022	30,577
2023	32,717
2024	35,008

Multi Day: It is assumed that multi day stays are 3 days in total duration or that visitors extend their stay by 3 days due to the availability of the GTMTB trails. This length of stay is consistent with the Dirt Art Feasibility report (2018). Overnight Spend (Per Night) assumed to be \$195 based on an average of estimates from Dirt Art (2018), TRC Tourism (2015) and Tourism Tasmania (2019).

New Expenditure: It is assumed that the creation of the GTMTB facility creates a Direct Impact through new expenditure and new visitation that would have otherwise not have occurred without the GTMTB facility (e.g. intrastate overnight travel) or through the extension of existing travel plans (e.g. for interstate travellers).

Other Visitors: To simplify the analysis, interstate and international tourists are combined into this category. It is expected that a clear majority of Other Visitors will be from key interstate markets.

Region: It is difficult to isolate the impact to the George Town municipality. Local riders and visitors will travel across the northern region and the expenditure will also accrue wide area. Therefore, the Region is defined as the Northern Region of Tasmania.



Trail Volume: It is assumed that the facility contains at least 70km of high-quality, purpose-built infrastructure as well as necessary supporting infrastructure such as signage, car parking and trail head facilities.

Rider Expenditures: Only the expenditure of riders has been accounted for. It is likely that some travellers will be accompanied by non-riders who will also spend in the Region.

Spend per day: The spend per day for overnight stays is based on a weighted average of intrastate, interstate and international daily spend estimates from TVS data (2019), Dirt Art Feasibility Report (2018) and Cycle Strategy for Northern Tasmania (TRC Tourism, 2016). Weightings are based on the proportion of visitation from intrastate, interstate and international visitors. Daily Spend (Day Visits) assumed to be \$56 per day.

Unique Visitors: In determining the impact of the proposal, rider numbers are expressed as 'unique visitors'. The total volume of local riders would almost certainly be higher than calculated. Many riders will visit the GTMB facility more than once during a 12-month period. However, the economic impact will not materially change as the economic impact from this visitor group is small due to the proportion of riders that do not contribute any expenditure to the area.

Comparison

The rider volumes and economic impact projected by Dirt Art for Stage One:

- Total visitation: 20 000 per annum
- Direct Impact: \$2.8M
- Indirect Impact: \$5.3M

The rider volumes and economic impact projected by Dirt Art for the completed project (Stages One and Two):

- Total visitation: 40 000 per annum
- Direct Impact: \$6.4M
- Indirect Impact: \$12.1M

This assessment considers the development of Regionally Significant 70km+ MTB facility (Stage One of the GTMTB proposal) of would generate the following impacts:

- **Total visitation:** ~16 000 - ~26 000 per annum
- **Direct Impact:** Between \$1.5M - \$3.4M
- **Indirect Impact:** Between \$2.9M – \$6.5M

NOTE: It is difficult to predict that increasing the trail volume beyond the proposed 70km Stage One would result in a proportionate increase in the economic impact. Whilst it could be argued that more trail brings more visitors, it is uncertain that more trail would necessarily increase expenditure and overnight stays unless the overall quantity of MTB visitors to Tasmania increased beyond current growth rates.

In addition, the overall success of the proposed trail network depends on other criteria (aside from volume of trail). These criteria are outlined on page 8 of this report and page 38 in the appendices.

Similar Projects

To put the rider projections into context, recent studies conducted for similar scale cycle tourism projects in Tasmania have produced the following estimated annual rider numbers.

- North Eastern MTB Project ~21 000 (Northern Tasmania Development, 2013)
- NE Rail Trail ~23 000 (TRC Tourism, 2014)
- Wild Mersey ~21 000 (TRC Tourism and World Trail, 2015)

Reliable data for rider numbers related to existing MTB trails is difficult to obtain. Anecdotal estimates for annual rider numbers for existing Tasmania MTB trails collected during stakeholder interviews for this study include:

- Blue Derby ~30 000 – ~40 000 (possibly up to 50 000)
- Maydena ~20 000 – ~25 000
- Penguin MTB Park ~8 000

Conclusion

Over the last 15 years, much research has been undertaken on the outdoor recreation market as a form of economic and tourism development. Recent successes in Northern Tasmania have further reinforced the potential of MTB trail infrastructure as a boost to underperforming regional economies.

However, despite the hype surrounding the growth of MTB tourism, it remains a niche market. According to the Tasmanian Visitor Survey (Tourism Tasmania, 2019), there are currently more visitors to Tasmania that:

- Canoe/kayak/sea kayak: ~25000
- Fish (other than trout): ~35000
- Take a train journey: ~45000

Nevertheless, research commissioned by Tourism Northern Tasmania (TRC Tourism, 2016) shows that MTB visitors are a high yielding section of an otherwise small market. Whilst the MTB market may be modest in overall size, MTB experiences are a proven opportunity to attract new visitors to regional areas (TRC Tourism, 2016).

The GTMTB proposal has merit. It comes at a time of considerable optimism for the future of cycle tourism in Tasmania. Stakeholder consultations reveal continued confidence in the ongoing growth of MTB visitation. There is strong support from regional development organisations, local businesses and a range of community members. The GTMTB proposal also fits an identified need for more regional-level trail networks that can support existing and proposed iconic MTB trails in Tasmania (TRC Tourism, 2016).

This analysis also shows that the direct economic impact for Stage One could be between \$1.5M - \$3.4M from up to 26,000 unique visitors per annum three years after construction. This is a strong result for an initial investment of around \$2.8M.

Further project planning, consultation and market research will assist to provide the GTMTB proposal with a clear direction, point of difference and governance framework to create a successful MTB development. Given the projected benefits and the recent demonstrations of community and business support for the project, the GTMTB proposal is an attractive opportunity for the community and economic development in the George Town area.

Recommendations

- That the GTC progress project planning for Stage One of the GTMTB proposal including the development of governance and management arrangements
- That stakeholders (including Tourism Northern Tasmania) develop a preliminary marketing framework to further articulate the “point of difference” for the trail network and develop strategies to leverage existing MTB visitation
- That GTC collaborate with existing project supporters (particularly the Chamber of Commerce) to extend consultation with the local community and northern Tasmanian MTB riders
- That a project ‘champion’ (either an individual or an organisation) be identified to provide a central point of contact for enquiries regarding the project
- Progress initial approvals for the project so that there are sections of trail that are ‘shovel ready’.



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Appendices



Multi Criteria Analysis – Comparison

The table below is an extract from a multi criteria analysis conducted in 2011 prior to the NEMTB project being initiated. The GTMTB proposal has been inserted to highlight major differences between the NEMTB location and the GTMTB proposal at a similar stage in the project lifecycle (initiation).

	Landowner Support	Planning	Community and Rider Support	Market Appeal	Benefit to Local Economies	Access	Profile and Other Attractions	Existing Trails	Existing Support Facilities	TOTAL
Blue Tier / Derby / Welborough	6	4	6	6	6	1	3	2	2	36
George Town	4	4	4	4	6	3	3	1	2	31

<i>Max Score</i>	6	6	6	6	6	3	3	3	3	42
<i>Min Score</i>	2	2	2	2	2	1	1	1	1	14

Assumptions

- Landowner Support: Discussions have already been undertaken with landowners for 'in principle support'. No formal approvals processes yet undertaken
- Planning: Two reports have been completed with specialised trail building companies. Initial site visits completed. Trails mapped
- Community and Rider Support: Some support from the local community. Limited consultation with rider groups in the surrounding region
- Market Appeal: The area has attraction including coastal scenery. Initial trail designs are like other facilities in the region that have proven popular. Compared to other iconic MTB areas (such as the Blue Tier), the landscape is not necessarily uniquely Tasmanian
- Benefit to Local Economies: In concept, the proposal has clear linkages to the township and integrates with existing tourism activities and assets
- Access: The site has very good accessibility for potential riders
- Profile and Other Attractions: George Town has significant and growing existing visitation as well as linkage to other attractions and touring routes
- Existing Trails: There are no significant or formalised existing trails for mountain bike riders
- Existing Support Facilities: George Town is well serviced for visitors with existing tourism and hospitality infrastructure, natural attractions and activities

Previous MCA 2011

Table 6: Assessment of Infrastructure Development Potential

Proposed Development	Nearest Town	Type of Riding	Landowner support high = 6 med = 4 low = 2	Planning high = 6 med = 4 low = 2	Community & rider support high = 6 med = 4 low = 2	Market appeal high = 6 med = 4 low = 2	Benefit to local economies high = 6 med = 4 low = 2	Access high = 3 med = 2 low = 1	Profile & other attractions high = 3 med = 2 low = 1	Existing trails high = 3 med = 2 low = 1	Existing support facilities high = 3 med = 2 low = 1	Total Score (Out of a possible 42)
High Priority Developments												
Blue Tier / Derby / Weldborough	Derby / Weldborough	XC / AM / DH	6	4	6	6	6	1	3	2	2	36
Hollybank Forest Reserve	Underwood	XC / DH / FR / DJ	6	6	6	4	2	2	3	1	3	33
Medium Priority Developments												
Trevallyn NRA	Trevallyn	XC / AM	6	6	6	2	0	3	2	2	2	29
Kate Reed NRA	Prospect	XC	6	6	6	2	0	3	0	2	1	29
The Flinders Experience	Whitemark / Lady Baron	XC / AM	2	4	6	6	6	1	2	1	1	29
Western Tiers / Tasmanian Trail	Deloraine	XC / AM / DH	4	2	4	6	6	2	2	1	2	29
North East Rail Trail	Scottsdale / Herrick	XC	4	4	6	2	6	2	2	1	1	28
Mt Helen – Mt Scott - Cuckoo Falls	Scottsdale	XC / AM	4	4	4	6	6	2	1	0	1	28
Craggy Peaks & Surrounds	Rossarden	XC / AM	4	4	4	6	4	1	1	1	1	28
Mt Victoria – Derby	Ringarooma / Derby	XC / AM	4	2	2	6	6	1	3	1	2	27

(Six Dot Consulting, 2011)

Table 5: Criteria used to assess trail development proposals.

Assessment Criteria	Rationale / Explanation
Essential Criteria	
Landowner support	Without landowner support a trail will not be developed. Where a final trail alignment is still to be finalised and it could potentially pass through multiple land tenures, the proposal would rank lower on this criteria.
Level of planning	Proposals that have had some level of planning and investigation to identify the type of trail, route, construction methods, costs of construction and maintenance and target markets provide land managers and grant providers with greater confidence about the feasibility of a proposal compared with conceptual proposals.
Level of community and rider support	Support of riders and the broader local community is a common success factor in established mountain bike destinations. Local riders and the community will help monitor and maintain trails and drive development.
Market appeal	To become a MTB destination requires trails that capture the imagination of riders. Capitalising on the Tasmanian brand with trails in iconic locations rich in scenery or set amongst wild, natural settings and unique terrain will appeal to riders. Exceptional or unique trails attract riders and capture the attention of MTB media and event organisers. Great trails in iconic locations offer the greatest appeal.
Potential to support local economies	A major focus of Governments and organisations such as NTD is to promote economic growth throughout the region. The more MTB riders disperse throughout the small rural communities, the greater the spread of benefits and the more attractive a proposal becomes to funding bodies. Economic benefits will drive community support and promote further investment in trail development.

(Six Dot Consulting, 2011)

(cont.)

Table 5: Criteria used to assess trail development proposals Continued...

Assessment Criteria	Rationale / Explanation
Desirable Criteria	
Accessibility to visitors and locals	Facilities that offer benefits to locals as well as visitors will have greater chance of attracting Government funding and generate volunteer support. While visitors will travel further to access great trails, locations that are close to population centres or on key touring routes will appeal to the broadest market, representing the most effective return on investment.
Tourism profile and links to other visitor attractions	Trails or riding areas that can leverage off established visitor attractions will require considerably less marketing effort than locations without a profile.
Existing support infrastructure	Mountain bike destinations require a range of infrastructure to succeed including trails, signage, car parks, toilets, accommodation, cafés, food outlets, transport and other support facilities. Where facilities already exist the time and financial commitment to put a riding area on the map decreases significantly.

(Six Dot Consulting, 2011)

Stakeholders Consulted

Stakeholders consulted during the development of this report:

Stakeholder	Organisation
Kevin Turner	RDA Tasmania
Buck Gibson	Vertigo MTB
Simon French	Dirt Art
Tara Howell	Blue Derby Pods Ride
Marcello Cardona	Next Level Mountain Bike
Maree Tetlow	Northern Tasmania Development Corporation
Georgie Brown	Northern Tasmania Development Corporation
Damien Blackwell	West Tamar Council
Chris Griffin	Tourism Northern Tasmania
Gary Thomas	Accommodation Provider - Derby
Maureen Lacey	Harcourts East Tamar
Harry Galea	George Town Council
Lou Clark	Bell Bay Aluminium
James Cameron	George Town Chamber of Commerce
Shane Power	George Town Council

Hierarchy – Daffyd Davis

Projects of local significance should meet the following criteria:

- *The development should provide an important local recreational resource*
- *The development should take place either adjacent to or not less than 10km from local communities*
- *The development should be not less than 20km from another local level facility*
- *The development should be a day visit destination only*
- *... the development should consist of not more than 25km of waymarked trails*
- *... it should consist of not more than 2 waymarked loops of between 40 minutes and 2 hours duration*
- *The development should consist of not less than 30% purpose built singletrack trails*
- *The development should be associated with very basic facilities e.g. parking and toilets*

Projects of regional significance should meet the following criteria:

- *The development should aim to create a high value regional recreation and tourism resource, which is also part of a national tourism product*
- *The development should be not less than 50km from regional centres of population*
- *The development should be not less than 50km from another regional level development or from a national level development*
- *The development should primarily be a day visit destination for the domestic market, however when combined with other regional and national facilities it forms part of a larger tourism destination*
- *The development can, when combined with other facilities, be a short break destination for both domestic and international markets*
- *...the development should consist of at least 40km of waymarked trails*
- *The development must consist of not less than 60% purpose built singletrack*
- *The development should consist of not less than 2 independent waymarked loops of not less than 2 hours duration each*
- *The development should be associated with basic visitor facilities e.g. toilets, parking, bike hire, light refreshments*

Projects of national significance should meet the following criteria:

- *The development should aim to create a high value, high quality tourism product of national importance*
- *The development should be not less than 100km from another national level facility or 50km from regional level facility*
- *Any development should primarily appeal to both domestic and international markets*
- *The development should be a stand-alone short break destination*
- *The development should also form part of a larger national longer-term destination*
- *The development must be of the highest possible quality*
- *In system the development must consist of at least 100km of waymarked trails*
- *...the development must consist of at least 4 independent waymarked loops of not less than 2 hours duration each with at least one loop of up to 4 hours duration*
- *... the development should consist of not less than 70% purpose built singletrack trails*
- *The development must be associated with high quality visitor facilities e.g. toilets, showers, café, bike hire*

(Davis, 2011)

Existing and Proposed Trails in Tasmania

TRAIL	2014	2019	2024
Bay of Fires Descent	0	0	46
Derby	50	100	120
Glenorchy	10	10	10
Hollybank	20	20	20
Kate Reed	10	15	15
Maydena	0	30	70
North South Track	23	23	23
St Helens	0	0	66
Trevallyn	7	7	10
West Coast	0	50	50
Wild Mersey	0	15	29
TOTAL KILOMETRES	120	270	459

The above table shows the estimated trail volumes at 2014, 2019 and a projected volume for 2024. Estimates have been gathered from internet research of trails where construction has been completed, commenced or funding has been committed for future trails.

Tasmanian Mountain Bike Plan – Trail Hierarchy 2009

(Sport and Recreation Tasmania, 2009)

Hierarchy	Description	Rationale	Core market appeal	Core criteria	Example trails
Potential Epic Ride	An outstanding trail experience/s nominated by the Tasmanian community and endorsed by IMBA as an EPIC ride.	IMBA has endorsed a number of Epic Rides (primarily in North America) that are world class and internationally marketed, but none have yet been nominated or approved in Australia. Tasmania, like most other states, should aim to identify, develop and manage an outstanding MTB trail that has the capacity to be recognised by local riders and IMBA as an Epic Ride. It is unlikely that multiple Epic Rides would be endorsed by IMBA within the state. To market and promote the distinctiveness of Tasmania as a destination, it would be appropriate to consider one of the potential Iconic Wild Rides as a prospective nomination for an Epic Ride.	International and interstate riders (the independent mountain biker) to be attracted to Tasmania for this ride. The Epic would also attract local riders, with levels of use influenced by location.	An Iconic Wild Ride that is considered to provide a high quality experience - a journey through a spectacular landscape, unique trail features, providing challenges for riders of varying abilities. The development of an Epic begins with the nomination of an existing trail, which is then assessed by IMBA against a number of criteria ²⁷ , including consideration of the unique features of the trail such as: quality and variability of experience the 'iconic' nature of the ride (representative ride of the region) trail length and amount of climbing diversity of riding (e.g. singletrack combined with service roads) trail popularity the geographic distribution of Epics relationship with the landowner and level of support from mountain bike riders.	To be determined. Likely to be one of the Iconic Wild Rides; recognising that the main points of difference for Tasmania are around the wild, natural environment these rides will encompass

Table 5.1. Proposed MTB trails hierarchy

Hierarchy	Description	Rationale	Core market appeal	Core criteria	Example trails
Iconic Wild Rides	World-class trail experiences located within the wild landscapes of Tasmania	This would involve choosing the very best MTB ride opportunities within Tasmania's unique landscapes that have the capacity to be developed and managed as world class trails. None of the nominated iconic wild ride locations are fully developed and it is suggested that there are two tiers of prospective trails. The first are considered to be the leading wild rides with outstanding prospects for trail development, upgrading of facilities and marketing (and least amount of work required). The second tier are those trail areas that need investigation and may require legislative or policy change to progress (given many of the best trail locations may be within or close to national parks).	International and interstate riders to be attracted to Tasmania for these rides. Local riders would also use the Iconic Wild Rides with levels of use influenced by location.	An Iconic Wild Ride must meet all of the following criteria: <ul style="list-style-type: none"> located within a landscape that is distinctive to Tasmania and recognised by both Tasmanians and visitors as being unique to or representative of the state the trail is designed, developed, managed and maintained as a world class MTB trail with suitable trail length, surfaces and high standard of facilities demonstrated capacity to attract international and interstate riders the trail offers a strong sense of naturalness and remoteness the trail offers inspiring and challenging experiences for intermediate to skilled MTB riders, but may also incorporate easier sections or alternatives 	<p>Leading Iconic Wild Rides:</p> <ul style="list-style-type: none"> North-South Track (as completed from Springs to Glenorchy) Blue Tier Area (including the Blue Tier Descent) Wildside MTB Race Section/s: (e.g. Trial Harbour to Granville Harbour, Montezuma Falls/Stirling Valley). <p>Iconic Wild Rides locations to be Investigated²⁸:</p> <ul style="list-style-type: none"> Wellington Park Coles Bay area Cradle Mountain area Maria Island National Park Tasman Peninsula Area Flinders Island Bruny Island.

Table 5.1. Proposed MTB trails hierarchy (continued)

²⁸ These are general landscape types/areas likely to be sought by MTB riders (as well as other participants in other outdoor adventure activities such as bushwalking, rock climbing, kayaking, etc.) and likely to meet the core criteria and core market appeal. They do not necessarily imply MTB riding is allowed or should be allowed within National Parks or other protected areas in these general areas. Where MTB riding is allowed in such areas it is only supported where it occurs on tracks or trails approved for such use and listing a national park or protected area does not provide an implied or express authority to ride on all trails in those areas.

Hierarchy	Description	Rationale	Core market appeal	Core criteria	Example trails
Iconic Wild Rides (continued)	See above	See above	See above	<ul style="list-style-type: none"> incorporates sections of MTB specific trail including singletrack, technical trail features and good flow the trail is managed on a sustainable basis with adequate management resources available to the land manager. 	See above

Table 5.1. Proposed MTB trails hierarchy (continued)

Hierarchy	Rationale	Core market appeal	Core criteria	Example centres
MTB Adventure Centres	<p>There are a number of remote locations within the state with the potential to provide a service base for riders to access a diversity of high quality adventure MTB trails (that are not necessarily of iconic wild ride status). Most of the suggested locations are comprised of towns that could embrace MTB riding as a prime focus for local tourism. The distinctiveness of the small towns and their local setting would provide a strong appeal for those riders seeking uncrowded, intimate and adventurous experiences away from the main urban areas. The potential for the development of the adventure centres would largely depend on the willingness of the local community to embrace MTB riding as a prime investment for their place – it would require upgrading of trails and support facilities, information and for customer service standards to be tailored to the MTB market. Riding opportunities should be explored outside the immediate Adventure Centre area (e.g. within an hours drive from the centre, and may include nearby towns and settlements, to provide a variety of experiences).</p>	<p>More likely interstate riders and possibly smaller numbers of international riders. May be one of the major attractions for riders to visit Tasmania, as well as add to the reasons to stay longer.</p> <p>It is likely that the development of MTB Adventure Centres would attract intrastate riders as well as local residents.</p>	<p>MTB Adventure Centres must meet all of the following criteria:</p> <ul style="list-style-type: none"> located so as to provide access to a network of adventure MTB trails within a natural setting the MTB trails are designed, developed, managed and maintained as high quality trails with suitable trail length, surfaces and high standard of facilities to cater for different skill and fitness levels must have well developed locally-based support facilities and services including a range of accommodation options, food and beverage, basic equipment supplies and information for MTB riders it must have the demonstrated support of the local council, land managers and local community to function effectively, and be promoted as a MTB Adventure Centre incorporate trails with sections designed specifically for mountains bikes, including singletrack and technical trail features the trail or specific MTB infrastructure is managed on a sustainable basis with adequate management resources available to the land manager. 	<p>Potential MTB Adventure Centres:</p> <ul style="list-style-type: none"> Derby and Wvelborough area Maydena area Wvaratah area Great Western Tiers area Ben Lomond area Snug Tiers area.

Table 5.1 Proposed MTB trails hierarchy (continued)

Hierarchy	Rationale	Core market appeal	Core criteria	Example trails/areas
Regional MTB Trail Hubs and Bike Parks	These are the key riding locations to meet the needs of local riders – well developed trail hubs and MTB parks within the major urban centres/regions that provide access to a network of local trails for day to day use.	Primarily local riders including intrastate travel during holidays and weekends, and during events. Some of these facilities will have the capacity to attract interstate and international riders through high level event infrastructure, and may also play a supporting role in addition to the Adventure Centres, and Iconic Wild Rides.	<p>A Regional MTB Hub or Bike Park must meet all of the following criteria:</p> <ul style="list-style-type: none"> • be recognised as a popular MTB riding area by the local riders, including MTB clubs • provide access to a diversity of trails and facilities of varying quality, length and suitability for different skill levels • have the capacity to hold MTB events • have basic support facilities to cater for the level of MTB riding use (e.g. parking, toilets, shelters, and signage) • have the support of the local council and relevant land manager • incorporates sections of MTB specific trail/infrastructure including singletrack and technical trail features • the trail or specific MTB infrastructure is managed on a sustainable basis with adequate management resources available to the land managers. 	<p>Northern Region:</p> <ul style="list-style-type: none"> • Trevallyn Reserve • Kate Reed Reserve • Wyena²⁹ and Hollybank. <p>Southern Region:</p> <ul style="list-style-type: none"> • Wellington Park • Glenorchy Mountain Bike Park • Clarence Mountain Bike Park. <p>Northwest Region:</p> <ul style="list-style-type: none"> • Stubbs Road³⁰ • Dial Range • Palooka.³¹

Table 5.1 Proposed MTB trails hierarchy (continued)

²⁹ This location is on private land and access is subject to the approval of the landowner.

³⁰ As above footnote.

³¹ This location is on Hydro Tasmania and State Forest land and access is currently informal.

Hierarchy	Rationale	Core market appeal	Core criteria	Example trails/areas
Local MTB Trails	Access to the network of local MTB trails close to urban living areas and work places.	Local riders	A Local MTB Trail is an authorised trail that is used by local riders with the knowledge and support of the relevant land manager. The trail should have a basic level of signage and active management to ensure risk management.	The majority of trails currently being used by MTB riders are local trails.

Table 5.1 Proposed MTB trails hierarchy (continued)

Criteria for Success

The Australian Capital Territory has long been considered a MTB travel destination in the Australian MTB market. Beginning in 1989 with the World Championships, the ACT has maintained its presence as a nationally significant MTB destination. Critical factors identified in this success as a destination include:

- *location and connectivity to the remainder of network*
- *quality of the facility*
- *environmental sensitivities associated with the location*
- *level of use or demand for the type of facility*
- *the need to maintain a diversity of experiences*
- *the contribution the facility could make to events (existing and proposed)*
- *the contribution the facility could make to the ACT reputation as a mountain biking*

(CBRE, 2011)

Research undertaken for the NEMTB project (TRC Tourism, 2013) also highlight similar success factors:

Trail design – *it is widely accepted and understood that trails need to be designed sustainably. The International Mountain Bike Association (IMBA) Trail Standards are a widely accepted means of achieving sustainable design. Trails must also be designed and constructed primarily for mountain bike use.*

Access – *trails that are easily accessible receive higher use. Networks located close to large urban areas receive high repeat levels of use with regulars riding up 2-3 times per week.*

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

The Visitor Experience - *while the trail is the critical component for the Destination MTB market, other supporting infrastructure and services complete the experience*

Management and Maintenance – *Ongoing trail management and maintenance provides a much greater challenge than obtaining funding and finding volunteers to build a new trail.*

Community Engagement – *the long term success of trails is closely linked to the degree of community engagement. Demonstrating the value of trails is important to convince non-riders of the benefits. Community support needs to extend beyond the dedicated trail builders to include the business sector and other community members/groups*

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

Events – *events can be an excellent vehicle and catalyst for raising the profile of a mountain bike destination. These range from community based festivals to races and national or international championship events.*

