

INSPIRE: *n. the arousing of feelings, ideas and impulses that lead to a creative activity. v. to uplift the mind of spirit.*
PLACE: *n. the connection between nature and culture which gives meaning to our everyday life. v. to position or arrange.*
NOTHOFAGUS GUNNII: *n. Deciduous beech, the only native deciduous tree endemic to the island of Tasmania, Australia.*



MOUNTAIN BIKE TOURISM MARKET PROFILE FOR TASMANIA

Prepared for Tourism Tasmania



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1. INTRODUCTION

Participation in mountain biking has increased markedly over the last decade worldwide, and has resulted in the emergence of a number of sub-disciplines and the development of mountain bike specific infrastructure and events. The revenue generated by some of these facilities has proven to be significant, particularly where they are located within proximity to large population centres.

Mountain bike tourism emerged largely as a result of the motivation of dedicated mountain bikers to experience new terrain, but has grown to include travel for participation in competition, festivals and skills training, as well as the incorporation of mountain biking into other commercial tourism activities.

Mountain biking is a popular activity in Tasmania, as evidenced by the recent development of mountain bike specific trails and infrastructure, establishment of state and local mountain bike clubs, the increase in mountain bike sales, the popularity of events such as the Wildside and the Australian National Bike Series, and the development, although limited, of commercial mountain bike tourism products.

Tasmania is an established nature-based tourism and bushwalking destination, well-known for its wild and iconic natural and cultural landscapes. Mountain bikers, particularly those interested in cross country riding or 'all mountain' riding, are seeking similar experiences to those of bushwalkers – escape, adventure in 'wild' and beautiful places, and challenge.

Tourism Tasmania recognise the potential for Tasmania to strengthen its position as a mountain biking destination, by leveraging off the natural landscape assets that the island possesses. This potential was also recognised in the recently completed *Trails Tasmania Strategy*, which made a number of recommendations relating to the development of mountain bike opportunities.

Inspiring Place were engaged by Tourism Tasmania to undertake desktop research and initial consultation to investigate existing and potential mountain bike tourism opportunities in Tasmania.

1.1 PROJECT AIM

The aim of this project is to investigate in more detail the opportunities outlined in the *Trails Tasmania Strategy 2007*, for the development of mountain biking experiences in the State, including to:

- Support the planning, development and management of high quality mountain-bike trails and parks across Tasmania that provide diverse trail experiences for a range of riding disciplines;
- Investigate the potential for Tasmania to be the first state in Australia to develop an International Mountain Bike Association (IMBA) Epic ride, or iconic mountain bike trail; and
- Investigate the scope to package, market and promote 'Tasmania's Great Mountain Bike Rides'.

More specifically, this report aims to provide an initial investigation into the characteristics of this emerging tourism market segment (including intrastate, interstate, and internationally), an overview of existing mountain bike tourism product and infrastructure in Tasmania, and an identification of the potential opportunities, based on the research findings and the core strengths, or points of differences unique to Tasmania.

The information outlined in this report will form the basis for the preparation of a *Mountain Bike Industry Development Strategy for Tasmania*.

1.2 PROJECT METHODOLOGY

The project comprised the following tasks:

reviewing available market data, including participation in mountain biking (rider profiles, popularity of the various disciplines, trends in bike sales, etc) from local, state, national and international sources;

reviewing existing infrastructure, events, competitions and tours in Tasmania;



consulting with a range of mountain bike contacts, including MTB Australia, Sport and Recreation Tasmania, land management agencies (e.g. Tasmanian Parks and Wildlife Service, Forestry Tasmania), Wildside organisers, Council contacts, cycle tourism operators, cycle shop owners via phone and/or meeting (see Attachment 1 for a list of contacts);

benchmarking of state, national and international MTB tourism destinations (e.g. including an overview of products, infrastructure, events and competitions, visitation and revenue);

preparing a summary report outlining the main research findings, the identified points of difference for Tasmania, and the best prospect mountain bike tourism products;

presenting the draft *Mountain Bike Tourism Market Profile* report to Tourism Tasmania, and amending the report where required; and

preparing the final *Mountain Bike Tourism Market Profile* report.

1.3 ACKNOWLEDGEMENTS

Inspiring Place would like to thank the stakeholders who gave their time to provide input into the project. In particular, the project team would like to thank Frank Hussey – Manager Sector Development, Tourism Tasmania, Nic Deka and Keith Ryan from Sport and Recreation Tasmania for their guidance, and all other stakeholders contacted.

1.4 LIMITATIONS

It should be noted that whilst this report provides a range of information and a number of recommendations relating to mountain bike tourism, it comprises an initial study only, undertaken within a limited timeframe, largely using desktop resources. Further investigation will need to be conducted to determine the feasibility of the potential opportunities outlined in this report.

There is very limited quantitative data available relating to MTB participants and MTB tourists in Australia/Tasmania, and therefore it is difficult to determine the size of the MTB market. The need for land managers and

tourism agencies to collect MTB specific data, including user profiles is a key finding of this report.



2. MOUNTAIN BIKING TRENDS

2.1 MOUNTAIN BIKING

The following definition of mountain biking derives from the report - *Exploring the Market Potential for Yukon Mountain Bike Tourism*¹:

“Mountain biking may best be described as a segment of cycling that is focused primarily on off-pavement travel. Mountain bikes are designed with wider tyres, a more upright position, and lower gearing than their on-pavement counterparts, and can accommodate a wide variety of riding surfaces, including pavement, gravel, rock and most soils”

Mountain biking encompasses four main sub-disciplines²:

CROSS COUNTRY/ ALL MOUNTAIN:

Cross country riders are generally self-sufficient, and are interested in riding longer-distance trails (e.g. 16-160km) with loops and natural obstacles. Cross country trails are generally a combination of single track and dirt roads, however, quality tracks are generally considered to be those that have large sections of well-constructed single track. The experiences sought includes solitude, nature, exercise and challenge. Cross country bikes are generally lightweight, with relatively short suspension.

Cross country mountain biking is now an Olympic and Commonwealth Games sport. The annual Tasmanian Wildside event is an example of a cross country stage race, although it has a very different format to that of the Olympic style events (e.g. the Olympic cross country events are generally circuits with a duration of 2 – 2.5 hours).

DOWNHILL:

Downhill mountain bikers are primarily interested in descending steep and technically challenging tracks. A range of sophisticated equipment is utilised by downhill riders, including reinforced body armour, and heavy-duty motor-bike style helmets. Downhill riding is generally more popular among younger riders. Serious downhill riding often occurs in alpine resort areas around the

¹ Koepke, J. (2005) *Exploring the Market Potential for Yukon Mountain Bike Tourism*, Cycling Association of Yukon, Canada, page 3.

² Based on the types of mountain bikers as outlined in IMBA (2007) *Managing Mountain Biking: IMBA's Guide to Providing Great Riding*.

world, due to their suitability for this discipline as a result of topography and infrastructure such as ski lifts and shuttles.

Downhill bikes are of a heavier construction with dual suspension. Downhill mountain biking, including competitive downhill, is becoming very popular at locations such as Thredbo and Mount Buller on mainland Australia.

4 X / D I R T J U M P I N G

This discipline is generally popular with younger riders, and is often associated with, or a progression from BMX riding. These riders seek dedicated dirt jump parks, such as the Tolosa Mountain Bike Park in Glenorchy, but may also take part in other types of mountain biking that involve jumps and obstacles. This discipline also encompasses 'head to head' racing (four races at a time) and dual slalom (two races on two separate identical courses).

A range of bikes are used, some of which are jump-specific models.

F R E E R I D I N G

Free Riding encompasses natural and constructed technical features such as rocks, logs, elevated bridges, jumps, drop-offs and teeter-totters, and has its roots in the North Shore region of British Columbia. Free ride features may be incorporated into cross country tracks, or be grouped into stand alone experiences. Free ride areas may be developed within an urban setting, similar to skate parks. A range of bikes are used for free riding.

Having recognised the various sub-disciplines of mountain biking, in reality the distinction between the disciplines is often less clear. 'All mountain' riding, encompassing elements of both cross country and downhill is likely to be the predominant discipline (e.g. many of the 7 Stains trails in Scotland fall into this category). The types of bikes used for 'all mountain' riding are generally hybrid bikes (e.g. a lightweight downhill bike, but sturdy cross country). Many riders use 'cross country' to describe this type of riding.

2.1.1 Participation and Demographics

There is limited participation data available which isolates mountain biking as a specific activity from that of general cycling in Australia or Tasmania.

Therefore, the following information is an overview of data from a range of sources, which when combined, indicate that mountain biking continues to increase in popularity:



Participation	Comment
<p>National Trends</p> <ul style="list-style-type: none"> • General cycling was rated as the fourth most popular physical activity in Australia in 2006, with an estimated 1.6 million participants - an increase of 17% from 2001³ • A record number of bicycles were sold in Australia in 2007 - 1.47 million bicycles, outselling cars for the 8th consecutive year⁴ • Approximately 70% of the bikes sold in Australia throughout 2005 were mountain bikes⁵ • A survey conducted by the Australian Bureau of Statistics in 2000 indicated that 4.2% of Tasmanians participated in off-road cycling or mountain biking (15,300) – 8,500 in the Greater Hobart/south, 3,300 for the north, 3,500 for the Mersey-Lyell area <p>International Trends</p> <ul style="list-style-type: none"> • Approximately 11.8 million people in the UK own a mountain bike, with an estimated 1.3 million regularly biking off road⁶ • Regular participation in the US ranged between 4-6% of the population (~14 million riders)⁷ between 1994 and 2003 • ~ 3.5 million German residents are mountain bikers (out of 7.2 million recreational cyclists)⁸ • mountain biking was the 10th most popular physical activity for New Zealand adult males in 2001 (10% - 128,200 people)⁹ • mountain biking was also rated the 10th most popular physical activity for New Zealand adults aged between 25-34 years in 2001¹⁰ 	<p>Mountain biking is a popular physical activity on an international scale, with participation rates continuing to increase.</p> <p>It is likely that the participation rate for both general cycling and mountain biking in Tasmania has increased significantly since 2000. Anecdotal evidence suggests that there is an increase in the number of commuter cyclists, the increasing demand for mountain bike accessible and/or specific trails, the increase in nationwide bike sales, and the construction of illegal MTB trails across the state.</p> <p>Local bike shops indicated that the most popular type of bikes sold are mountain bikes in the \$500 range, followed by mountain bikes in the \$1000 range.</p>

³ Standing Committee on Recreation and Sport (2007) *Participation in Exercise, Recreation and Sport Survey 2006 Annual Report*.

⁴ <http://www.cyclingpromotion.com.au/content/view/299/9>. Accessed on the 9th September 2008.

⁵ Australian Bicycle Industry (2006) *The Australian Bicycle Industry Report 2006*, page 11.

⁶ Genesis Strategic Management Consultants (2008) *Draft: The Sustainable Development of Mountain Biking in Scotland – A National Strategic Framework*, UK, page 2.

⁷ Koepke, J. (2005) *Exploring the Market Potential for Yukon Mountain Bike Tourism*, Cycling Association of Yukon, Canada, page 4.

⁸ Ibid.

⁹ <http://www.sparc.org.nz/research-policy/research/sparc-facts-97-01/top-sports-and-physical-activities>.

Accessed 25th September 2008. Figures are based on participation within the 12 months prior to the survey, and people over the age of 18.

Demographics	Comment
<p>Specific visitor profiles for Tasmanian events and tours are provided in Section 2.5 as case studies. The following mountain bike rider demographics are a generalised summary drawn from a number of Australian and international sources¹¹:</p> <p>The majority of experienced mountain biker riders:</p> <ul style="list-style-type: none"> • are male (up to 80 or 90%), however, it is expected that there will be a discernable gender shift in years to come, as between 2002 and 2003 there was a 33.9% increase in the participation of women in the US¹² • have tertiary level education, and come from professional or technical backgrounds • have high incomes (e.g. \$50,000 and above) • range in age from mid 20's to mid 40's, with a high percentage in the mid 30's age group • tend to travel in small groups of 2-3 people • tend to travel to destinations within half day to day away from home or base for the majority of mountain bike trips, but will travel further for unique experiences or competitions • expect a relatively high level of trail infrastructure and associated services at MTB destinations • ride once to 2-3 times per week • generally access information about a destination through word of mouth or the internet • cite features such as fitness/exercise, technical challenge, spectacular scenery, local culture, and accessibility as important attributes for MTB destinations 	<p>This general outline of rider demographics is broadly consistent with the profiles of Tasmanian event riders (see Section 2.5), and with stakeholder and personal observations of riders.</p> <p>The demographic profile indicates that the majority of serious mountain bikers (excluding the generally younger group of extreme downhill and Bike Park riders) have above average annual incomes, and are willing to travel for quality experiences. The tendency of riders to travel in small groups is also a positive factor in relation to revenue generation.</p> <p>Mountain bikers are experience driven and educated, and therefore likely to respond to innovative media, including inspirational imagery of riders in unique and wild landscapes, downloadable information and consideration of sustainable track construction techniques.</p>

¹⁰ <http://www.sparc.org.nz/research-policy/research/sparc-facts-97-01/top-sports-and-physical-activities>. Accessed 25th September 2008.

¹¹ See Bibliography.

¹² Koepke, J. (2005) *Exploring the Market Potential for Yukon Mountain Bike Tourism*, Cycling Association of Yukon, Canada, page 5.



2.1.2 Primary Motivators

The following summary of primary motivators are derived from a consideration of a range of studies and discussions with experienced MTB riders:

Convenience/accessibility (e.g. the majority of independent mountain bikers seem to seek out day ride destinations);

Trail quality (e.g. diversity of terrain, trail features, and amount of single track) and quantity of riding available in an area; and

Iconic experience – riding in a unique, natural landscape setting, with high scenic value.

Whilst convenience of access in relation to the interstate/international market is not a key strength, Tasmania does have the potential to deliver on the last two key motivators. However, to do so, will require a commitment to quality trail design and construction, and locating trails in uniquely Tasmanian natural environments.

2.2 MOUNTAIN BIKE TOURISM

Cycling tourism is a component of the adventure travel, or ‘adventure seeker’ market. A cycle tourist, can be defined as:

“a person who is away from their hometown or country for a period of not less than 24 hours or one night, for the purpose of a vacation or holiday, and for whom using a bicycle as a mode of transport during this time away is an integral part of their holiday or vacation. This vacation may be independently organised or part of a commercial tour and may include the use of transport support services and any type of formal and/informal accommodation¹³”

This broad definition does not take into account cycling ‘excursionists’ undertaking cycling-based excursions away from their home of a shorter duration:

“a person involved in any recreational cycling activity or excursion, which is undertaken within a time period not longer than 24hrs or one night from their home destination, and for whom cycling is seen as a positive way of using their leisure time”

¹³ Faulks, P., Ritchie, B. and Fluker, M. (2007) *Cycle Tourism in Australia: an investigation into its scope and size*, CRC for Sustainable Tourism Pty Ltd, page 7.

Whilst these definitions are not specific to mountain biking, they do provide a useful starting point. To paraphrase the above, a mountain bike tourist, more specifically, may be defined as:

a person who is away from their hometown or country for a period of not less than 24 hours or one night, for the specific purpose of undertaking mountain biking activities, including independent riding (any of the recognised sub-disciplines), commercial guided tours, skills camps, events or festivals.

Similarly, mountain bike excursionists may be defined as:

a person involved in any form of mountain bike activity or excursion, which is undertaken within a time period not longer than 24hrs or one night from their home destination.

Included within the mountain bike tourism mix, should also be those 'adventure seekers', who may undertake a mountain bike activity, either self-guided or commercially guided, as part of a broader nature-based experience, or whilst visiting friends and relatives, or as part of a more traditional road cycling tour program.



2.2.1 Benchmarking: MTB Tourism Destinations

The brief overview provided below presents the main features of selected successful mountain bike tourism destinations, including a summary of the types of products and infrastructure available, events and competitions, and an estimation of visitation and revenue:

MTB Destination	Infrastructure	Products	Events and Competitions	Visitation	Revenue
Whistler, BC, Canada www.whistlerbike.com	<ul style="list-style-type: none"> Over 1,200m of bike park terrain, including technical single tracks, easier lines and steep rock faces Extensive valley trail system Over 250 km of lift serviced downhill trails Two skill centres, jump park, drop off park, Boneyard Slope style Park Indoor 'Air Dome' bike training facility with foam pit and wooden ramps 	<ul style="list-style-type: none"> Fall Two Nights Two Days Mountain Bike Package (\$91), including hotel accommodation for two adults, and bike park tickets Three and four days packages available Crankworx Packages (from \$80 per person) Range of skills camps and lessons Summer Gravity Camps, Dirt Series MTB Camps, Freeride Camps, Instructor Development Courses, MTB Park 101 lessons, and day tours 	<ul style="list-style-type: none"> Harvest Huckfest MTB event weekend P hat Wednesdays – downhill race series K okanee Crankworx Freeride Mountain Bike Festival (8 day schedule) – attracts international competitors and spectators 	<ul style="list-style-type: none"> ~ 80,000 in 2003 (an increase of 30% from 2002)¹⁴ Anticipate 250,000 MTB visitors by 2008 – surpassing ski and snowboard visitors¹⁵ 	The general Whistler trail system generated approx. \$6.6 million over the period June 4 th to Sept. 17 2006 ¹⁶

¹⁴ DSE Recreation and Tourism Forum (2007) *Mountain Biking in Victoria: The Role of Public Land* (Powerpoint presentation).

¹⁵ Ibid

¹⁶ Western Canada Mountain Bike Tourism Association (2006) *Sea to Sky Mountain Bike Economic Impact Study Overall Results*, Vancouver, Canada, Page 1. (this figure does not include Whistler Bike Park spending)

MTB Destination	Infrastructure	Products	Events and Competitions	Visitation	Revenue
Whistler, BC, Canada www.whistlerbike.com	<ul style="list-style-type: none"> • Range of bike shops, with hire facilities • Range of 'bike friendly' hotels • Fully serviced, all year round alpine village 	<ul style="list-style-type: none"> • Women's Nights (Monday and Wednesday at the MTB Park) • Whistler Pro Team (elite riders) 	See above.	Crankworx attracted approx. 55,000 visitors in 2006 (in excess of 23,000 visited solely for the event, generating in excess of \$11.5 million) ¹⁷	\$16.2 million for the Whistler Bike Park ¹⁸

¹⁷ Ibid

¹⁸ Ibid. Non-resident visitors only.



MTB Destination	Infrastructure	Products	Events and Competitions	Visitation	Revenue
<p>7 Stanes, Scotland www.7stanes.gov.uk</p>	<ul style="list-style-type: none"> • Encompasses 7 Forestry Commission Scotland sites in the south of Scotland • Over 400km of trails ranging from easy forestry roads to technical and strenuous single track • High amount of purpose-built single track at some of the seven sites, and some sites have bike park infrastructure (e.g. Northshore timber trail, extreme downhill/freeride) • All sites have differing levels of onsite facilities including toilets, cafe, playground, bike hire, bike wash, showers and bike shops • Full range of other services within close proximity to sites, including accommodation and dining 	<ul style="list-style-type: none"> • 7 Stanes website – the main portal which combines trail and mountain biking information with support services and tourism information • Brochures and trail maps (electronic and hard copy) • Merchandise (e.g. T shirts, cycling jerseys, socks, baseball caps, mugs, thermos stationary) • Mountain Bike Business Network works in partnership to provide support services for mountain bikers in Scotland that benefit local communities (e.g. accommodation and tours can be booked online) • Businesses involved in the Mountain Bike Business Network cater specifically for mountain bike riders, and may offer discounts and accommodation packages 	<ul style="list-style-type: none"> • Range of competitions and events that run throughout the year, including: stages of the SXC Cross Country MTB Series, Dalbeattie Challenge Duathlon (trail running and mountain bike race), Ladies Freeride Weekend • Events are organised and run by a range of mountain bike and outdoor adventure organisations 	<p>Approximately 400,000 to date¹⁹ (approx. 80% of the market are non-local)</p>	<p>\$9.29 million expenditure for Southern Scotland²⁰</p>

¹⁹ EKOS Limited and Tourism Resources Company (2007) *7 Stanes Phase Two Evaluation*, Forestry Commission of Scotland, UK.

²⁰ Ibid



MTB Destination	Infrastructure	Products	Events and Competitions	Visitation	Revenue
<p>Rotorua (Whakarewarewa Forest), North Island, New Zealand www.riderotorua.com</p>	<ul style="list-style-type: none"> • Multi-use recreational area • More than 65 km of purpose built MTB trails linked to a network of forest roads (downhill, cross country, single track) • Number of 'core' trails designated MTB only, maintained by volunteers • Support amenities (toilets, parking, picnic facilities) • Full range of services in Rotorua including MTB hire, bike shops, tours and skill clinics, cafes, dining, range of accommodation) 	<ul style="list-style-type: none"> • Trail maps and signage • Planet Bike tailored MTB tours (including multi-day) and clinics (located on site at the Whakarewarewa Forest) • Local MTB manufacturing company (Kiwibikes) 	<ul style="list-style-type: none"> • North Island Interclub Duathlon Championships 2008 • Treble Treat - 3 Course MTB Race 2008 • Peak2Pools – social downhill race • Auckland MTB Cross Country Spring Series 2008 • 2008 Whaka 100 MTB Marathon 2008 • 2008 National Secondary Schools MTB Relay • 2006 World MTB Championships 	<p>Approx. 6,500 annual MTB users, equating to approx. 51,000 MTB activities per year²¹</p>	<p>\$4.35 million annually²²</p>

²¹ APR Consultants (2005) *Mountain Biking in Rotorua, NZ.*

²² Ibid.



MTB Destination	Infrastructure	Products	Events and Competitions	Visitation	Revenue
<p>Queenstown, New Zealand, South Island</p>	<ul style="list-style-type: none"> • Range of nearby trails, including those at nearby Lake Wakatipu • Coronet Peak Bike Park • Infrastructure • Extensive range of services, including dining, accommodation, bike shops, bike hire, and guided tours 	<ul style="list-style-type: none"> • Range of MTB tourism operators offering day tours, through to multi-day trips (based around either single track, free ride, cross country, downhill, and heli-biking) • Queenstown and Wakatipu MTB Trail Guide (\$4) 	<ul style="list-style-type: none"> • Queenstown Winter festival – Outdoor Sports MTB on Snow • Mountain bike lift passes (e.g. for Coronet Peak) • MTB skill training sessions at Coronet Peak (\$60 per 3 hours plus lift pass) 	<p>Not available</p>	<p>Not available</p>



MTB Destination	Infrastructure	Products	Events and Competitions	Visitation	Revenue
<p>Mount Buller, Victoria, Australia www.MTBuller.com.au</p>	<ul style="list-style-type: none"> • Over 100km of cross country trails that link with Mount Stirling Alpine Resort, and down into the Delatite and Howqua Valley (trail network is currently under expansion, including beginner trails, easy down hill and new linkages to the cross country network) • Four lift-accessed downhill trails • Bike hire (cross country and downhill) • Limited options for food and accommodation on mountain throughout the summer 	<ul style="list-style-type: none"> • Cross Country Escape Package (\$215 per person), includes: One full-day MTB, helmet and glove hire, Full day lift pass, two-night weekend accommodation at Ski Lodge • Downhill Adventure (\$305 per person, \$295 triple/quad share includes: One full day MTB and full-face helmet hire, One all-day lift pass, two nights motel style accommodation • Two course meal on Saturday evening and continental breakfast each morning • Bike Buller brand - Bike Buller Ambassadors (professional road and MTB riders, including Simon Gerrans Tour de France stage winner) • MTB Trail Guide and Map • Downhill Day Lift Pass (\$45), Season Pass (\$310) 	<ul style="list-style-type: none"> • Victorian Downhill MTB State Series and Final • 2008 Buller Cup (downhill) • 2008 Shimano Southern Cross Interschools MTB Championships 	<p>Not available</p> <p>Significant increase in summer visitation can be attributed to MTB over the last few years</p>	<p>Not available</p>



MTB Destination	Infrastructure	Products	Events and Competitions	Visitation	Revenue
<p>Stromlo Forest Park, Canberra, Australia www.stromloforestpark.com.au</p>	<ul style="list-style-type: none"> • Multi-use recreational facility with event pavilion, criterium cycling circuit, grass cross country running track, and trails suitable for equestrian and walkers • Developed around the MTB Park concept – caters for all disciplines of MTB, including 2.2 km long downhill course, mountain cross course, 35km of cross country track, 14.8 km beginner MTB track, 10 km intermediate MTB track • Permanent trials area to be developed in the near future • Full range of services available in Canberra, approximately 10 min drive away 	<ul style="list-style-type: none"> • Stromlo Forest park website • Trail map (available for download from the website) 	<ul style="list-style-type: none"> • National MTB Championships 2007-2009 • To hold the 2009 World MTB Championships 	<ul style="list-style-type: none"> • 92, 000 vehicular counts in 10 months²³ 	<p>Not available</p>

²³ DSE Recreation and Tourism Forum (2007) *Mountain Biking in Victoria: The Role of Public Land* (Powerpoint presentation). This figure would also include the vehicular movements of horse riders and other recreational users.



2.2.2 Mountain Bike Market Segments

INTERSTATE AND INTERNATIONAL MARKETS

Mountain bikes tourists, whilst sharing some similarities with general cycling or nature-based tourists, they have quite specific requirements and expectations. A brief summary of identified mountain bike market segments for Tasmania is provided in the following table:

MTB Sub-Markets	Independent Mountain Biker (Destination Mountain Biker)	Event Mountain Biker	Guided Adventure Seeker	Event Spectators	Independent Adventure Seeker
MTB as trip motivator	Primary	Primary	Primary or Secondary	Primary or Secondary	Secondary
General Characteristics	<ul style="list-style-type: none"> • Primarily male, aged between 20–40 • Have a tertiary level of education and mid to high incomes (e.g. higher than \$50 K) • Mountain bike regularly (e.g. once a week - 2-3 times per week) • Likely to own more than one bike valued at over \$1000 • Travel with own bike 	<ul style="list-style-type: none"> • Primarily male, aged between 30-49 • Likely to own more than one bike valued at over \$1000 • Have a tertiary level of education and mid to high incomes • Travel with own bikes • Willing to pay for quality experience • Interstate competitors attracted to Tasmania for high profile or exceptional events only (due to cost and time constraints) 	<ul style="list-style-type: none"> • May have some MTB experience • Will hire a bike and other gear • Likely to be interested in half to full day tour, or mountain biking as part of a broader tour program • Will likely spend the rest of their tour sight seeing • May include families 	<ul style="list-style-type: none"> • Mainly intrastate and interstate market • Attracted to high profile events (e.g. national or state level competition) • Family and friends will support recreational competitors • Other activities and attractions may also be a motivator for attending event (e.g. activities for children) • May MTB/cycle recreationally 	<ul style="list-style-type: none"> • Have chosen to holiday in Tasmania for other reasons (e.g. other nature-based activities or visiting friends or relatives) • May include the touring market (camper vans) • May have own bike, or may hire a bike • Require easy access to trail information (e.g. internet or map/brochure), and more likely to visit Visitor Information Centre

MTB Sub-Markets	Independent Mountain Biker (Destination Mountain Biker)	Event Mountain Biker	Guided Adventure Seeker	Event Spectators	Independent Adventure Seeker
MTB as trip motivator	Primary	Primary	Primary or Secondary	Primary or Secondary	Secondary
General Characteristics (continued)	<ul style="list-style-type: none"> • Generally have high fitness and technical ability • Are seeking adventure, skill and physical challenge in exceptional natural landscapes • Motivated by the technical quality of trails – in particular the amount of single track (e.g. narrow, rough and winding with features), and exploring new areas is important • Frequently ride trails rated 'difficult' or 'advanced' • Seeking non-crowded, natural destinations • Majority likely to fit into the 'all mountain' category (cross country and down hill elements) 	<ul style="list-style-type: none"> • Frequently ride trails rated 'difficult' or 'advanced' • May be converted to participate in a supported mountain bike tour program (e.g. pre-arranged accommodation, with bike specific facilities and gear transport) • May stay in the state to sight see, visit friends and relatives and take part in another activity post competition 	See above	<ul style="list-style-type: none"> • Often seeking quality accommodation and dining • Often stay on after the event has finished to sight see, visit friends and relatives or take part in other activities 	<ul style="list-style-type: none"> • More likely to ride easy or moderate trails (e.g. higher amount of 'double track' - fire trail, dirt road) • May be converted to participate in a guided MTB day trip • Includes families



MTB Sub-Markets	Independent Mountain Biker (Destination Mountain Biker)	Event Mountain Biker	Guided Adventure Seeker	Event Spectators	Independent Adventure Seeker
MTB as trip motivator	Primary	Primary	Primary or Secondary	Primary or Secondary	Secondary
General Characteristics (continued)	<ul style="list-style-type: none"> Require good quality base facilities (e.g. track signage, maps and track notes, access to bike shops, accommodation and dining) Generally rely on web-based information, or word of mouth Willing to pay for a quality mountain bike experience May compete in events May be converted to participate in a supported mountain bike tour program (e.g. pre-arranged accommodation, with bike specific facilities and gear transport, rather than guided tours) 	See above	See above	See Above	See above
Likely Proportion of the Market	Likely to be the main MTB segment for Tasmania..	Significant market segment, but likely limited by distance and travel cost from interstate/international origins.	Small proportion of the market.	Small overall proportion of the market.	Small proportion of the market.



MTB Sub-Markets	Independent Mountain Biker (Destination Mountain Biker)	Event Mountain Biker	Guided Adventure Seeker	Event Spectators	Independent Adventure Seeker
MTB as trip motivator	Primary	Primary	Primary or Secondary	Primary or Secondary	Secondary
Case Studies	See above	<p>Wildside Case Study (2008):</p> <ul style="list-style-type: none"> • 87 % were men • 41% of competitor were in the 30-39 age group, 23% 40-49 and 12% 23-29 age group • the majority of competitors had a high annual income (majority over 50 K), 23% \$50-\$70K, 19% \$70-\$90K, 15% \$90-\$120K • 26 % of competitors were from Victoria, 13% NSW, 2% international and 40% Tasmania • Generally seeking comfortable accommodation 	<p>Ben Lomond Descent Visitor Profile Case Study</p> <ul style="list-style-type: none"> • Primarily young professional couples from Victoria or NSW • High disposable income • Fly in for short weekend break • Pre-book tour online • Generally sight see or undertake other activities on the other day • Generally have some MTB experience, but most below the level of a 'mountain biker' 	See above	See above



MTB Sub-markets	Independent Mountain Biker (Destination Mountain Biker)	Event Mountain Biker	Guided Adventure Seeker	Even Spectators	Independent Adventure Seeker
MTB as Trip Motivator	Primary	Primary	Secondary or Secondary	Primary or Secondary	Secondary
		<p><u>Wildside Case Study (Cont.)</u></p> <ul style="list-style-type: none"> Motivated to travel to Tasmania to compete due to diversity of the Tasmanian environment, including wetter climate (water features) <p><u>Launceston MTB Events (mid 2006 to mid 2007²⁴)</u></p> <p>The events attracted a total of 630 participants throughout 2006/07</p> <p>Only 13.5% of participants were women</p> <p>The average age was 35</p> <p>The majority of participants were Tasmanian, with some representation from other Australian states</p>	<p><u>Ben Lomond Descent (Cont.)</u></p> <ul style="list-style-type: none"> Small amount of international visitors to date (generally spend part of their time in Australia) 		

²⁴ The data included above is based on participation in a number of Enduro races, the Tasmanian Cross Country Race Series, Summer Twilights and social rides. It is likely that the same people participated in a number of the events, and therefore the data are representative only.



INTRASTATE MARKET

Local mountain bikers are an important segment of the overall market. Tasmanian mountain bikers travel considerable distances from their homes to take part in independent adventure riding around the state, on both day and overnight trips, and also travel to participate in club events and competitions. Characteristics of interstate riders include:

- The majority of experienced local riders are likely to be of a similar demographic and socio-economic profile to that of the independent and events riders outlined in this report.
- A small, but growing percentage are members of local clubs (e.g. the Launceston MTB Club, Dirt Devils/Hobart Wheelers, Burnie Cycling Club) and participate in club activities (e.g. Tasmanian Cross Country Series, Enduro races etc).
- A significant number travel to other places primarily to participate in mountain biking (e.g. New Zealand, Whistler, mainland Australia).
- A significant percentage of the Tasmanian population takes part in off-road cycling (4.2%)²⁵.
- Tasmanian riders contacted as part of this study indicated that they would be happy to pay for quality trail maps, and potentially a small fee for entry into an area that caters well for mountain bikers (e.g. with purpose built infrastructure, toilets, showers, secure parking and bike wash).
- As in many places, the exclusively downhill and free riders are of a younger age group (e.g. 15-mid 20's), although these disciplines are increasing in popularity with older riders. The lack of designated downhill trails was noted by a number of local riders – particularly in relation to the Hobart area.

SUMMARY

In summary, the main MTB market for Tasmania is likely to be the independent mountain biker, with Victoria and NSW, followed by other Australian states, as the main market origin. The event market is also a significant market, as

²⁵ Australian Bureau of Statistics (2006) Regional Statistics, Tasmania. <http://www.abs.gov.au/ausstats/abs@.nsf>. Accessed on 9th of August 2008. Local bike shops in Hobart indicated that off road bikes, around the \$500 price point are the most popular bikes sold.

evidenced by the success of existing events, such as Wildside, which attracts a strong interstate representation.

The international market is considered to be relatively small, due to distance and strong competition from established MTB destinations. However, Tasmania's reputation as a place to experience 'wild' landscapes, combined with a commitment to developing high quality and innovative MTB infrastructure, provides an opportunity to grow this market.

Studies and other information reviewed as part of this project indicated that there is some cross-over between the mainstream cycling market (touring/road cycling), including²⁶:

higher than average income;

aged 24–49

likely to travel as a family or couple

more men than women (although the proportion of women is much closer to that of men for mainstream cycle tourism than is the case for MTB specific tourists)

trend towards lower cost accommodation (e.g. friends/relatives home, tent/camping, standard hotel/motel, self-contained unit;

the tendency to spend more than the average traveler;

high reliance on word of mouth, previous experience and the internet as information sources;

likely to take part in other activities on a trip involving national parks, forests, swimming, beaches or bushwalking;
and

the tendency for MTB to participate in road cycling, touring or commuter cycling.

There is, therefore, the potential for some conversion of mainstream cyclists to mountain biking. However, the infrastructure and experience requirements of the two cycling segments are considered to be quite distinct.

²⁶ This information has been adapted from Roy Morgan Research (2006) *Cycle Tourist Insights*, Tourism Australia. This study also noted that only 2% of cycle tourists visited Tasmania on their last trip.



There is also some indication that there is significant conversion of bushwalkers to mountain biking. The potential conversion of the bushwalking and mainstream cycling market, in conjunction with encouraging younger BMX or dirt jump riders to continue on to mountain biking, provides for the opportunity to significantly grow both the interstate and intrastate MTB market.

3. THE TASMANIAN SITUATION

This section provides an overview of the existing mountain bike infrastructure, tourism operators and premium events currently in operation in Tasmania.

3.1 EXISTING INFRASTRUCTURE

The following table provides a brief overview of selected mountain biking areas around the state. The information provided is a snapshot of the more well-known and/or frequented areas only:

Destination	Summary
Wellington Park	<ul style="list-style-type: none"> • range of cross country and downhill trails, including purpose built MTB infrastructure (the new North South Link²⁷ and Glenorchy MTB Park) and fire trails • basic trail map available • good car access to most trails - good accessibility from Hobart and the surrounding suburbs • significant potential for further cross country and downhill riding, which could be associated with the Glenorchy MTB Park (further development will need to be in accordance with the <i>Wellington Park Bike Strategy</i>) • popular local riding area • existing commercial tour (Mount Wellington Descent) • associated amenities (e.g. parking and toilets) available at some locations • managed by the Wellington Park Management Trust
Glenorchy MTB Park	<ul style="list-style-type: none"> • land managed by the Glenorchy City Council and Wellington Trust • good accessibility from the City and surrounding suburbs • jump park and technical single track infrastructure developed in partnership with the Dirt Devils Club • requires improved maintenance and work to ensure the standard of the facility is appropriate for national events • number of local, state and national events held (e.g. round of the National MTB Series) • basic amenities (e.g. parking) • linkages to MTB accessible trails within Wellington Park

²⁷ This new trail has been constructed to a very high standard, and caters for cross country riding. Council has plans to extend this trail in the future.

Destination	Summary
Meehan Range (Greater Hobart Area)	<ul style="list-style-type: none"> • popular location for local freeriders and cross country riders • series of short single track, jumps and obstacles as well as fire trails • majority of purpose built infrastructure has been constructed by riders • good accessibility • limited amenity (small parking area only) • potential for conflict with trail bike riders • managed by the Parks and Wildlife Service • site of the proposed Clarence MTB Park
Trevallyn Reserve and Kate Reid Reserve	<ul style="list-style-type: none"> • trail plans are currently under development for these reserves (by the Parks and Wildlife Service and Launceston City Council), including significant effort into improving MTB opportunities – the plans will legitimise mountain biking within these reserves • good accessibility • primarily cross country, including single track • popular local riding area • commercial tours operate in the area (MTB! Tasmania) • managed by the Launceston City Council and Parks and Wildlife
Hollybank, Mt Arthur, North East	<ul style="list-style-type: none"> • some existing MTB trails (e.g. downhill) • Forestry Tasmania has recently prepared a <i>MTB Trail Network Plan</i> for the area, with the help of Joey Klein, IMBA Trail Specialist (work has not yet commenced) • only 19km from Launceston – good accessibility • significant potential for cross country and downhill riding • some existing amenity (e.g. parking, toilets and picnic facilities) • managed by Forestry Tasmania
Ben Lomond, North East	<ul style="list-style-type: none"> • moderate downhill riding on the main access road from the village to the base of the mountain (Jacob's Ladder) • series of single track and fire trails at base of the mountain • location of state events (e.g. King and Queen of the Mountain) • commercial tours operated in area (Ben Lomond Descent by MTB! Tasmania) • National Park – managed by Parks and Wildlife • moderate accessibility from Launceston – day trip from other population centres • downhill and cross country potential – particularly at the base of the mountain (e.g. in association with the proposed trails at Craggy Peaks) • range of accommodation and services onsite, and opportunities for a range of other activities (e.g. at Craggy Peaks)



Destination	Summary
The Blue Tier Reserve, North East	<ul style="list-style-type: none"> • cross country riding on existing fire and other trails • long distance trail from the Blue Tier to Weldborough (recent work on this trail for mountain bikes has been damaged by trail bike riders) • recent upgrade of MTB infrastructure part of a federal grant program • moderate level of amenities (parking and toilets within the reserve, accommodation and dining at Weldborough) • conflicts with trail bike riders and potentially horse riders • not easily accessible from the major population centres (e.g. day or overnight trip) • managed by Forestry Tasmania
Wildside course stages, West Coast	<ul style="list-style-type: none"> • includes sections such as Montezuma Falls, Stirling Valley, Granville Harbour • technical riding on fire trails, 4WD trails and single track • linkages with local towns and amenities • support from local businesses • potential to develop a riding experience based around a section/s of the longer course • primarily cross country • various land tenures (some sections are on private land and are restricted to race day use only) • not easily accessible from the major population centres (long day or overnight trip)
Dial Range, North West	<ul style="list-style-type: none"> • cross country and downhill • existing trail map (however, the advertised MTB trails are not considered to offer the best riding opportunities in the area) • good accessibility from Burnie, Devonport, Penguin • half day to full day trip from other population centres • low level of amenity (e.g. parking) • managed by Forestry Tasmania
Tarkine Forest Adventures (Dismal Swamp), North West	<ul style="list-style-type: none"> • series of MTB loop trails at Forestry Tasmania's Tarkine Forest Adventures (Dismal Swamp) Attraction • entire trail system will be ~13km long • predominately cater for cross country riders • trails have been designed to cater for beginner, intermediate and advanced riders • it is intended that MTB hire will be available on site • potential for future MTB interpretive tours is being explored • trails are to be officially opened in December 2008

Destination	Summary
Stubbs Road, North West	<ul style="list-style-type: none"> privately owned 50ha property, near Turners Beach the owner gave permission for MTB riders to use and develop the site 10 years ago the site has 10km of cross country single track, and two downhill tracks hosts annual 4 hour Enduro event and a round of the State Cross XC Series considered to be the most popular MTB riding area in the northwest
Four Springs	<ul style="list-style-type: none"> cross country riding area located near Westbury public reserve developed by the Launceston MTB Club, and is used frequently by Launceston riders hosts an annual 12 hour Enduro event and shorter cross country races

Whilst there is significant momentum among Tasmanian mountain bike enthusiasts for trail development and promotion, there is a lack of quality base infrastructure available. This is particularly evident in comparison to the trail infrastructure, support facilities and associated tourism products and packages offered by the well-known mountain bike destinations (e.g. such as those benchmarked above).

Taking the next step will require coordination of effort and the formation of partnerships between mountain biking clubs and enthusiasts, tourism operators and land owners/managers, as well as support from agencies including Tourism Tasmania, and Sport and Recreation Tasmania.

3.2 EXISTING MTB PRODUCTS AND EVENTS

Mountain bike specific tourism products are currently very limited in Tasmania. The businesses included in the following table are the only operators currently offering commercial tours. Island Cycle Tours have a successful core business of road touring, and only offer mountain biking as part of their Mount Wellington Descent tour. Mountain Bike! Tasmania are currently the primary mountain bike tourism operator in the state, and are only in the early stages of their operation.

The events included in the summary are a selection of the premium state events, for which data was available:



Existing Tourism Products	Product Overview
Commercial Tours	
<p><u>Island Cycle Tours</u> Mount Wellington Descent Active Tours – Bike, Hike, Kayak www.islandcycletours.com</p>	<p><i>Mount Wellington Descent:</i></p> <ul style="list-style-type: none"> • Follows the Mount Wellington Road, and connects (if guests are willing) to off-road trails, followed by snacks at Cascade Gardens and finishing at Salamanca Place. • Departs: 9.30am and 1.30pm September to June • Cost: \$75 (adult), \$70 (child/concession)
<p><u>Mountain Bike! Tasmania Tours</u> The Ben Lomond Descent 'Keep Some in Reserve' – Trevallyn Reserve 'Pedal About' – North Esk River www.mountainbiketasmantia.com.au</p>	<p><i>Ben Lomond Descent:</i></p> <ul style="list-style-type: none"> • Starts at the Ben Lomond Village and descends 1050 m via Jacobs Ladder and 4WD tracks. • Departs: Wednesday and Saturday • Duration: 6-7 hours from Launceston • Cost: \$150 (includes transfer to and from Ben Lomond, lunch and snacks, bike, helmet and day pack) <p><i>Keep Some in Reserve:</i></p> <ul style="list-style-type: none"> • Explores a variety of tracks within Trevallyn Reserve, including technical single track, easy fire trails, and a walk through Cataract Gorge. • Departs: Tuesdays and Fridays • Duration: 3-4 hours • Cost: \$90 (includes snacks, bike, helmet and day pack) <p><i>Pedal About:</i></p> <ul style="list-style-type: none"> • Leisurely circuit following the banks of the North Esk and Tamar Rivers. • Departs: Mondays and Thursdays • Duration: 2-3 hours • Cost: \$75 (includes snacks, bike, helmet and day pack)
<p><u>Tarraleah Lodge</u> The Breakfast Bike Ride</p>	<ul style="list-style-type: none"> • Guided downhill ride from the Lodge to the river below • Platypus spotting on route • Cooked breakfast prepared by the guide • Ride back up the hill to the Lodge in the 'Adventure Tarraleah Oka' (4WD bus)

Existing Tourism Products	Product Overview
Commercial Tours	
<u>Wildside MTB Race</u>	<ul style="list-style-type: none"> • Biannual cross country MTB competition ('mountain to beach' riding) – scheduled to take place on the 30th January – 2nd February 2010 • ~ 200km of varied terrain between the Cradle Valley and Strahan • The field is capped at 350 competitors • Range of men's and women's categories (must be 18 to compete) • Entry is \$396 (includes lunches and a competitor kit) • Competitor bus services are available to assist competitors to get to the start of the race (e.g. either from Strahan or from Launceston), including personal gear transportation throughout the race (\$198 - \$268) • Total prize money of \$7000 (awarded to stage winners and overall winners, as well as spot prizes)
Australian Mountain Bike Series (Glenorchy Mountain Bike Park round host)	<p>Will host:</p> <ul style="list-style-type: none"> • Round 5 of the National XCO Series on the 28th of February • Round 4 of the National 4X Series on the same day • Round 5 of the National DH Series on the 1st of March 2009 • hosted rounds of the Australian MTB Series in 2006
Launceston MTB Club Events	<p>The Launceston MTB Club hosts a range of events, including:</p> <ul style="list-style-type: none"> • 4 Hour Enduro • 6 Hour Enduro • 1 2 Hour Enduro • Tasmanian Cross Country Race Series • Summer Twilights • Social rides <p>The majority of participants are generally Tasmanian, with some competitors from NSW and Victoria</p>

PROPOSED MTB PROJECTS

In response to the increasing popularity of mountain biking, and demand for infrastructure, a number of

Proposed Clarence Mountain Bike Park: Clarence Council have recently prepared a development plan for a mountain bike park within the Meehan Range Reserve area, on the site of existing MTB activities. Work on the park is expected to commence in the near future, and include the construction of cross country, downhill, 4 Cross (dirt jump) and beginner trail infrastructure. It is intended that the park will be constructed to a standard to cater for national



level MTB competition, and potentially operate in partnership with the Glenorchy MTB Park.

Maydena Activity Hub: Forestry Tasmania are looking to develop an outdoor activity hub at Maydena, 80 km west of Hobart. Mountain biking is one of the proposed activities, in addition to guided walking, 4WD tours, horse riding, fishing, caving or climbing. Forestry Tasmania are currently in discussion with a potential MTB tourism operator, and are developing plans to redevelop an existing track into a MTB specific course. It is unlikely that his project will be online within the next couple of years.

Wellington Park: Building upon the Wellington Park Bike Strategy, the Hobart City Council will continue to construct the remaining stages of the North-South Track, eventually linking the Hobart and Glenorchy sections of Wellington Park. The next stage to be constructed will link the Springs to the start of the existing North-South Track. The Wellington Park Management Trust, in conjunction with the Hobart and Glenorchy City Councils, is also continuing discussions with local riders to explore new opportunities as outlined in the Bike Strategy, including the potential for a new downhill track in the Hobart section of the Park.

In addition to the proposed downhill trail outlined above, the potential to develop a purpose built MTB track between Big Bend in Wellington Park and the Glenorchy MTB Park, comprised a specific action in the *Glenorchy Recreation Plan 2008-2013: Volume 1: Strategies and Actions*. The Plan highlights the promotion of:

vehicle access (and large car park) at the top of the track;

the long descent from the top of Mt Wellington;

Glenorchy MTB as an end point; and

Tolosa Park as a trailhead.

Savage River Pipeline: The potential for the Savage River Pipeline alignment to be developed into a long distance, unique riding experience was noted by some MTB enthusiasts. It should be noted that this is a concept only, and has significant tenure and risk issues.

Craggy Peaks: Craggy Peaks resort, located at Rossarden, intend to develop ~20km of MTB specific trails in the near future. The new trails will be in addition to existing MTB trails in the area.

Tarraleah: Tarraleah Lodge offer mountain biking as a guided experience (The Breakfast Bike Ride) as part of their activity package. There is recognised potential for further development of mountain bike product in this area.

Great Western Tiers/Meander Valley: The Meander Valley Council has received funding for development of the Great Western Tiers Cycling Strategy under the state *Tourism Promotional Plan (2006)*. The Plan includes development of trail and supporting infrastructure, interpretation and supporting collateral and signage and a community education program to develop a cycle friendly community. The infrastructure includes a range of themed trails for mountain bikers.

3.3 TASMANIA AS A MTB DESTINATION

This section provides a brief overview of the strengths, weaknesses, opportunities and threats in relation to the development of mountain bike tourism in Tasmania, in light of the information that can be ascertained about the market:

3.3.1 SWOT Analysis

Strengths	Weaknesses
<ul style="list-style-type: none"> • Diverse landscape and terrain within a small land area (e.g. possible to experience a range of natural landscapes in one day) • Cool Temperate Rainforest/wet forest riding opportunities • Small size of the island allows for easy access between destinations • Established reputation as a leader in nature-based and adventure tourism • 'Wild', rugged and remote scenery • 'Small' feel, authentic local experiences • Range of existing base infrastructure, the majority of which is located within close proximity to towns and urban centres (e.g. new cross country track in Wellington Park) • Reputation of existing events (e.g. annual Wildside competition), already attracting interstate and some international visitation • Enthusiasm of local mountain biking clubs and individuals 	<ul style="list-style-type: none"> • Distance from core international mountain bike tourism markets (e.g. USA, Canada, Europe and New Zealand) • Distance from interstate mountain bike hubs/destinations (e.g. Mount Buller, Thredbo, Stromlo)²⁸ • Not located within close proximity to major population centres (e.g. in comparison to Whistler or the 7 Stains) • Limitations associated with mountain bike access to more scenic and remote locations within National Parks/wilderness areas • Lack of significant infrastructure base, such as alpine resorts, to provide a catalyst for mountain bike riding (e.g. in particular lift-assisted downhill riding) • Limited supply of dedicated single tracks • Lack of other mountain bike specific infrastructure, such as 'bike barns', secure bike storage, wash and repair facilities associated with tracks • Mountain bike tourism in early stages of development • Lack of quality information about existing MTB opportunities

²⁸ An overview of the costs associated with bike transport with the major carriers is provided in Attachment 2.



Opportunities	Threats
<ul style="list-style-type: none"> • Increasing popularity of mountain biking in Tasmania, Australia and overseas • The development of mountain bike experiences based around the unique and diverse natural landscapes of Tasmania • Potential to package mountain biking with existing adventure and nature-based tourism products, as well as food and wine products • Potential to lever off existing and future events and competitions to raise the profile of Tasmanian mountain biking • Interest expressed by government agencies, councils and other land managers in relation to mountain bike facilities development • The potential to tap into state recreation planning initiatives arising from the <i>Trails Tasmania Strategy</i> (e.g. in relation to planning processes and funding initiatives that may benefit both residents and visitors) and other programs • Although Tasmania is a considerable distance from mainland Australia, the Victorian market is, in reality, only ~ 1 hour away by air and low cost flights are generally available 	<ul style="list-style-type: none"> • Strong competition from more established mountain bike destinations (e.g. New Zealand and mainland Australia) • Travel and bike transport costs acting as a deterrent for interstate and international visitors • Lack of support from land managers and tourism bodies • Potential that developed trails will not meet the expectations of mountain bikers (e.g. not be specifically designed for mountain bikers)

3.3.2 The Tasmanian Point of Difference

The main points of difference for Tasmania as a mountain bike destination are considered to be the:

highly diverse, compact and 'wild' natural environment, providing opportunities for riders to experience a range of landscapes and terrains within a short period of time (e.g. the summit to the sea in a day);

opportunities for riders to experience cool temperate rainforest/wet forests by bike; and

established, high profile reputation as a nature-based and adventure tourism destination, with the potential to bundle mountain biking activities with other tourism products, including food, wine and culture.

4. POTENTIAL OPPORTUNITIES FOR DEVELOPING MTB RIDING TOURISM

The following provides a 'shopping list' of potential opportunities for developing mountain bike riding tourism within the State. The opportunities respond to the analysis of the market segments, the identified Tasmanian points of difference, consultation with experienced riders and stakeholders, and review of the experience of existing MTB destinations.

The opportunities arising from the review are considered to be:

1. Supporting existing tourism operators (primarily Mountain Bike! Tasmania), through marketing and promotional assistance (all of the successful destinations have capitalised on the power of 'iconic' photography to entice their audiences).
2. Supporting existing and proposed national and international level mountain bike events/festivals consistent with the Tasmanian brand.
3. Investigating the potential to develop a number of dedicated mountain biking hubs²⁹ and trails around the state. The following locations are examples of potential destinations for either hubs or trails, all of which have either existing or planned mountain bike infrastructure:

Hobart/South: Wellington Park/Glenorchy Mountain Bike Park, Meehan Range/Clarence Bike Park, and the proposed Maydena Activity Hub;

Launceston/North: Trevallyn Reserve/Kate Reid Reserve (Launceston), Hollybank, Ben Lomond;

North West: Dial Range, and Dismal Swamp; and

Strahan/Rosebury/West: Selected sections of the Wildside course (e.g. Montezuma Falls).

4. Providing opportunities to package a selected range of 'hero' rides as the 'Great Tasmanian Mountain Bike Rides'.

²⁹ The concept of a mountain biking 'hub' is defined in Attachment 3.

5. Developing mountain bike riding commercial tourism opportunities utilising the base infrastructure outlined above, including day tours, multi-day tours, skills camps, events and festivals, and indirect servicing opportunities such as accommodation, dining and transport.

6. Developing a trail website for Tasmania, with a link to a mountain bike specific web page with downloadable maps and trail notes, and the ability to book tours or transport online.

7. Investigating the potential to develop a high yield, supported mountain bike product based around:

an iconic trail in a scenic Tasmanian landscape;

independent riding, with gear transport between destinations;

high quality accommodation and dining (e.g. Tasmanian produce and wine provided by local operators); and

bike specific facilities at destinations and accommodation places (e.g. bike wash, secure storage, and repair/servicing facilities).

8. Investigating the opportunities to incorporate mountain biking into other nature-based tourism programs (e.g. multi-activity programs).

9. Investigating the potential to develop travel packages for independent interstate/international mountain bikers (e.g. cost savings on bike air transport, accommodation deals etc).

10. Packaging the existing trails and facilities available, and promoting in a brochure, with maps and trail notes. This could be done in a similar way to that of the successful '60 Great Short Walks' program.

11. Investigating the proposed downhill MTB track between Big Bend on Mt Wellington and the Glenorchy MTB Park as outlined in the *Draft Glenorchy Recreation Plan 2008-2013*, and in accordance with the *Wellington Park Bike Strategy*.



12. Developing an iconic trail/s experience, that has the potential to become an IMBA EPIC³⁰ ride (EPIC status would act to raise the profile of the ride, and Tasmania as a mountain bike destination) – refer to Attachment 4 for examples of IMBA EPIC rides.

³⁰ IMBA EPIC rides are exceptional, primarily long distance trails that have been nominated to the International Mountain Bike Association for certification of EPIC status. IMBA representatives assess the trail against a set of criteria. Currently there are no EPIC rides in Australia (the majority are in the USA).

5. RECOMENDATIONS

Based on the research and consultation undertaken, the main recommendations for guiding the initial stages of developing Tasmania as a mountain bike tourism destination are considered to be:

1. Prepare the proposed *Mountain Bike Industry Development Strategy for Tasmania*, with input from mountain bike organisations, operators, riders and land managers.
2. Develop and implement research/data collection methodology to capture mountain bike specific information (e.g. rider profiles, participation trends, and take up of commercial products), in partnership with Tourism Australia, IMBA Australia, state agencies (e.g. Sport and Recreation Tasmania) and commercial operators.
3. Further investigate the recommendations relevant to mountain biking in the *Trails Tasmania Strategy 2007*, as part of the *Mountain Bike Industry Development Strategy*, including:
 - support the planning, development and management of high quality mountain bike trails, hubs and parks across Tasmania that provide a diversity of trail experiences for a range of riding disciplines;
 - investigate the potential for Tasmania to be the first state in Australia to develop an IMBA Epic ride; and
 - investigate the scope to package, market and promote Tasmania's Great Mountain Bike Rides.
4. Prepare a map and trail notes for existing MTB trails, to improve visitor information in the short-term.
5. Work with existing operators to enhance mountain bike products, including package development, promotion and branding.
6. Support local clubs and organisers to increase the promotion and capacity of the premium and national level competitions.
7. Work with land managers to development high quality base infrastructure based around the concept of mountain bike hubs and unique trail experiences.

8. Prepare a feasibility study for the proposed Big Bend to Glenorchy Mountain Bike Park track. The proposed track has the potential to be a distinctive, high quality downhill MTB track, and contribute to addressing the need for longer distance downhill MTB riding experiences in the area.



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ATTACHMENT 1

STAKEHOLDERS CONSULTED

Stakeholders contacted throughout the preparation of this study included:

- Sport and Recreation Tasmania (Nic Deka and Keith Ryan)
- Wildside MTB Competition (Nic Deka)
- Luke Chiu (Glenorchy City Council)
- Staff at Ray Appleby's bike shop, Elizabeth Street, Hobart
- Selected experienced riders from the Hobart area
- Parks and Wildlife Service Tasmania (Annie McCuaig)
- Forestry Tasmania (Richard Skinner)
- Hobart City Council (Jill Hickie)
- Clarence City Council (Recreation Officer – Matthew)
- MTB Australia (Tony Scott)
- MTB Launceston (Ian Smith)
- MTB! Tasmania Tours (Ian Ferrear)
- Island Cycle Tours (Sam)
- Hobart Wheelers/Dirt Devils Inc, (Adam Christopher)
- Australian MTB Magazine (Editor)
- Cycle Tourism Australia

ATTACHMENT 2

AIRLINE CARRIER BIKE POLICY

Carrier	Summary of Bike Policy
Virgin Blue³¹	<ul style="list-style-type: none">• Bikes must disassembled and packed in a bike box or similar case (bike boxes can be purchased at the airport for \$15.00)• Must be checked in no later than one hour prior to departure• Excess baggage may apply if the bike is over the weight allowance (travelers with sporting goods such as bikes, are eligible to check in an extra 5kg free of charge)
Jetstar³²	<ul style="list-style-type: none">• Bikes must disassembled and packed in a bike box (Jetstar do not provide bike packs for purchase at the airport)• Excess baggage may apply if the bike is over the weight allowance (no single item must exceed 32kg in weight)• Bulky items (max. 2m for A320 aircraft, max. 2.77 for A330 aircraft) including bicycles, may be included within the allowance subject to space availability• Passengers with bulky items should check in at least 2 hours prior to departure for domestic flights and 3 hours for international flights
Qantas	<ul style="list-style-type: none">• Bikes must disassembled and packed in a bike box (bike boxes can be purchased from most Australian and New Zealand Qantas terminals for \$16.50)• Bike boxes purchased elsewhere must comply with the following dimensions: Length: 140cm Width: 30cm Height: 80cm• The bike box constitutes one piece of checked baggage - additional baggage rates will apply if the bike box and checked baggage exceed the free baggage allowance (e.g. \$20 per piece plus GST, or per kilogram, and depending on mileage for international flights)

³¹ <http://www.virginblue.com.au/Personal/Flightinfo/Baggage/Over-sized/Baggage/Over-sized...>

³² <http://www.jetstar.com/au/travel-info/at-the-airport/bulky-items.html>

ATTACHMENT 3

DEFINING MOUNTAIN BIKE RIDING HUBS

For the purposes of this study, mountain bike hubs are defined as well-developed locations that have centralised, high quality MTB specific and visitor support infrastructure.

MTB 'hubs' will:

be developed in areas that are relatively easy to access (e.g. short car trip, bus ride or bike ride) from main centres or towns with support facilities;

offer a range of integrated riding infrastructure (e.g. gravity parks, downhill trails, cross country, free ride elements) and a diversity of riding, avoiding duplication of experience (e.g. differing terrain, trail features, level of difficulty);

have installed centralised trailhead/s, with trail signage and markers, detailed trail notes and maps, toilets, secure car parking and bike wash-down;

be attractive to both visitors and residents, and provide for beginner to advanced riders (less experienced riders are often attracted to areas frequented by advanced riders);

have close proximity to access a range of accommodation, dining, and retail services (including bike shops and repair);

have potential for the development of additional facilities e.g. shuttle bus facilities for areas with long downhill trails, on site café and bike hire and/or bike shop where such facilities and services can be demonstrated to be viable and appropriate;

have developed with genuine opportunities for input from experienced mountain bikers, and mountain bike specific trail specialists;

have been developed to high environmental and technical standards to ensure sustainability (e.g. IMBA guidelines); and

provide opportunities for hosting national and international level competition (this level of facility may be developed at two or three locations rather than all hubs).



ATTACHMENT 4

CHARACTERISTICS OF IMBA EPIC RIDES

The following table provides a brief overview of the characteristics of a few selected IMBA EPIC Rides³³:

IMBA Epic	Type of Trail	Distance	Climbing/elevation
Tahoe Rim Trail Epic Lake Tahoe, Nevada, USA	Rocky and smooth single track (open to bikes only on even numbered days)	45km	~ 1, 212m
Henry Coe Epic Morgan Hill, California, USA	Range roads and single tracks	39km	~ 251m – 666m
Seven Summits Trail Rossland, BC, Canada	Technical high- mountain single track	55km ~	909m
Eagle Ridge Expedition, Vancouver, BC, Canada	Technical single track, old access roads, steep drops, bridges and teeter-totters	16km ~	151-454m
Cortina Epic Cortina d'Ampezzo, Italy	Mix of rocky dirt roads, ancient cart paths and single track	To be determined	Typically ~ 909m

³³ http://www.imba.com/epics/seven_summits.html