



Concept Plan - West Coast Town to Town Trail Opportunities

West Coast, Tasmania

West Coast Council

August 2021



Table of Contents

1	<i>Executive Summary</i>	7
2	<i>Introduction</i>	9
2.1	Project Overview	9
2.2	Key Objectives	9
2.3	Project Background	9
2.4	Establishing the West Coast as a Mountain Bike Destination	10
3	<i>Market Analysis</i>	12
3.1	Overview	12
3.2	The Back Country Mountain Bike Rider	12
3.3	The Adventure Trails Rider	13
3.4	Suggested Target Market	13
4	<i>Methodology</i>	14
4.1	Background Analysis	14
4.2	Stage 1 Consultation	14
4.3	Desktop Analysis	14
4.4	Field Analysis	15
4.5	Development of Multi-Factor Analysis	15
4.6	Stage 2 Consultation	15
		16
5	<i>Site Analysis</i>	
5.1.1	Overview	16
5.1.2	Climate	18
5.1.3	Vegetation	18
5.1.4	Land Tenure	18
5.1.5	Mining lease considerations	18
6	<i>Consultation</i>	20
6.1	Overview	20
6.2	Key Stakeholders	20
6.2.1	West Coast Council	20
6.2.2	Tasmanian Parks and Wildlife Service	20
6.2.3	Mining and Minerals Tasmania (MMT)	20
6.2.4	Destination West Coast (DWC)	20
6.2.5	West Coast Mountain Bike Club (WCMTBC)	20
6.2.6	Police and Emergency Services	21
6.2.7	Business Community	21
6.2.8	West Coast MTB Reference Group	21
6.2.9	Community Consultation	21
7	<i>Existing and Emerging Trail Destinations</i>	23

7.1	Overview	23
7.2	Locations	23
7.2.1	Queenstown	23
7.2.2	Zeehan	23
7.2.3	Rosebery/Tullah	23
7.2.4	Strahan	24
8	<i>Proposed Development</i>	25
8.1	Overview	25
8.2	Interaction with Other Trail Users	25
8.3	Land Tenure	25
8.4	Development Zones	25
8.4.1	Overview	25
8.5	Prioritisation Matrix	26
8.5.1	Overview	26
8.5.2	Matrix Criteria	26
8.5.3	Interpreting the Multi Factor Analysis	27
8.5.4	Mount Owen Trail Zone	29
8.5.5	Rating Matrix	31
8.5.6	Analysis of Criteria Scoring	31
8.5.7	Trial Harbour Trail Zone	33
8.5.8	Rating Matrix	35
8.5.9	Analysis of Criteria Scoring	35
8.5.10	Granville Harbour to Zeehan Trail	37
8.5.11	Rating Matrix	40
8.5.12	Analysis of Criteria Scoring	40
8.5.13	Rosebery Trail Zone	42
8.5.14	Rating Matrix	44
8.5.15	Analysis of Criteria Scoring	44
8.5.16	Tullah to Rosebery Trail	46
8.5.17	Rating Matrix	48
8.5.18	Analysis of Criteria Scoring	48
8.5.19	Rosebery to Zeehan Trail	50
8.5.20	Rating Matrix	52
8.5.21	Analysis of Criteria Scoring	52
8.5.22	Zeehan to Strahan Trail	54
8.5.23	Rating Matrix	56
8.5.24	Analysis of Criteria Scoring	56
8.5.25	Mount Lyell Loop	58
8.5.26	Rating Matrix	60
8.5.27	Analysis of Criteria Scoring	60
8.5.28	Queenstown to Strahan	62
8.5.29	Rating Matrix	64
8.5.30	Analysis of Criteria Scoring	64
8.5.31	Rosebery to Queenstown	66
9	<i>Implementation Plan</i>	67
9.1	Project Staging	67
9.2	Concept Trail Design	67
9.3	Detailed Trail Design	68
9.4	Approvals	68

9.4.1	Parks and Wildlife Service (Reserve Activity Assessment) RAA	68
9.4.2	Sustainable Timber Tasmania (STT)	68
9.4.3	Development Application	68
9.4.4	Geotechnical Assessment	68
9.4.5	Water Catchment Considerations	69
9.4.6	Mining Leases	69
9.5	Construction Approach	69
9.5.1	Machine construction where possible	69
9.5.2	Hand building in rugged areas	69
9.5.3	Climatic considerations	69
9.6	Marketing	70
9.6.1	Overview	70
9.6.2	Integration with recent West Coast re-branding	70
9.6.3	Marketing opportunities	70
9.6.4	Website	71
9.6.5	Marketing budget	71
9.7	Suggested Development Budget	71
10	<i>Operational Considerations</i>	72
10.1	Management Models	72
10.2	Trail Maintenance	72
10.3	Risk and Incident Management	73
10.4	Bushfire Risk and Management	73
11	<i>Economic Impact Analysis</i>	74
11.1	Overview	74
11.2	Projected Visitation	74
11.3	Estimated Economic Impact	75
11.3.1	Assumptions	75
11.3.2	Direct Economic Impact	75
11.3.3	Indirect Economic Impact	75
12	<i>Conclusion</i>	76
13	<i>Appendix 1 – Mountain Bike Market Overview</i>	77
13.1	The Mountain Bike Market - National and Local	77
13.1.1	Overview	77
13.1.2	History	77
13.1.3	Current market	77
13.1.4	Current participation and economic data - Australia	78
13.1.5	Current Participation and economic data - Southern Hemisphere	78
13.1.6	Current participation and economic data - Northern Hemisphere	79
13.1.7	The future	80
13.2	Mountain bike tourism	81
13.2.1	Mountain bike tourism markets	81
13.2.2	Complementary mountain bike tourism markets	81
13.2.3	Enthusiast tourist market	82
13.3	Defining Mountain Bike Destinations	82
13.3.1	Overview	82
13.3.2	Nationally Significant Destination	83

13.3.3	State-significant Destination	83
13.3.4	Regionally Significant Destination	84
13.3.5	Local-Level Destination	84

Disclaimer: This report draft has been prepared by *Dirt Art Pty Ltd*; for the West Coast Council. Any content within this report represents the views of *Dirt Art Pty Ltd* only and is not to be interpreted as the view of the West Coast Council and/or other project stakeholders. The report is a draft only, with all contents contained in the report yet to be progressed through land manager and statutory approvals. No design or written descriptions within the report are to be deemed a final design or an approved project, until such time that the report is finalised and all statutory approvals are in place.

Report Version:

Date	Version	Author	Notes
4 th May 2021	Internal Draft	Simon French	Internal use only
6 th May 2021	Internal Draft	Jason Lam	Internal use only
26 th May 2021	Internal Draft	Simon French	NA
30 th May 2021	Draft for distribution	Simon French	NA
1 st June 2021	Final Draft	Simon French	NA
7 th July 2021	Amended Draft	Simon French	Public Distribution
23 rd August 2021	Final Report	Simon French	NA

1 Executive Summary

The West Coast of Tasmania is an emerging mountain bike destination of national significance. At the time of preparing this report, construction is nearing completion on the Queenstown Mountain Bike Trails Project, which will add a further ~35km of new trails to the regional mountain biking opportunity. Final development approvals are also underway for a new trail network in Zeehan, the first stage of which will see approximately 20-25km of trails developed, of a proposed ~35km. It is expected that construction of the Zeehan trail network will commence in Spring 2021.

This project aims to build upon existing and emerging mountain bike trail developments in the region to create a further development stage/s for the region. The focus of the project is on back country riding experiences that connect towns, though the project will also explore opportunities to consolidate and enhance existing trail opportunities in the region.

Dirt Art has elected to focus multi-day riding experiences on connecting towns, therefore avoiding the necessitation of developing remote camps/huts. While the development of camps/huts would open up the feasibility of longer riding sections, the development cost and complexity, and narrower rider market opportunity reduces the priority of this type of development. Importantly, the use of towns as nodes for these rides also vastly improves economic development opportunity, particularly in the food and beverage, and accommodation sectors.

Trails have been proposed at multiple locations across the region, with a focus on connecting towns, and creating a series of trail nodes focused on towns and relevant infrastructure. The proposed trail concepts cater for a broad market of riders, with a focus on creating highly appealing, iconic riding experiences that attract visiting riders.

The West Coast region provides a wide range of stunning, rugged and remote environments for mountain bike trail development. The wild landscape and wet climate provide a number of challenges for the development and operation of mountain bike trails, with some areas of the region all but impossible to develop trails through.

Dirt Art has developed a number of potential trail concepts across the region, achieving the following strategic objectives:

- Sustainably showcase the unique West Coast environment
- Develop designs for a network of trails that has significant appeal for visiting riders
- Develop designs for a network of trails that caters for local riding community wants and needs
- Minimise ongoing maintenance and maximise the riding experience by carefully considering the local climate
- Maximise economic development opportunities for the region
- Work to reduce implementation complexity through careful analysis of land tenure and related factors

- Create a suite of 'hero trail experiences'
- Create trails for a broad market of riders
- Maximise any project budgets
- Carefully consider operational aspects of the trails (including safety management, maintenance, uplift etc.)

Dirt Art has developed a multi-criteria analysis (MCA) that analyses the proposed trail concepts against a range of key criteria. The MCA assists in providing a robust assessment framework, which aids in prioritising trail concepts.

As a result of this plan, *Dirt Art* has developed fourteen trail network concepts, spread across the region. These concepts aim to provide a suite of world-class mountain bike experiences, which build upon existing and emerging developments, as well as creating a range of new stand-alone experiences.

2 Introduction

2.1 Project Overview

Dirt Art has been engaged by the *West Coast Council* to develop a regional mountain bike trail development plan that will guide the next phase of mountain bike trail infrastructure development across the West Coast region. The focus of the plan is on providing town to town connectivity through longer format mountain bike trail experiences, as well as exploring opportunities to achieve strong visitor growth through expansion of existing trail networks. By utilising the existing infrastructure and amenities offered in the various towns, the plan leverages on these opportunities to create a holistic and interesting trail product that does not rely on ancillary developments such as remote wilderness camps/huts. Instead, riders are taken in and out local towns, each with their own identity and peculiarities, creating a genuine experience and cultural authenticity that cannot be reproduced in any other manner. The plan builds upon several years of mountain bike infrastructure planning and construction, including recent and upcoming major trail destinations being constructed in Queenstown and Zeehan.

Development opportunities have been ranked against a multi factor analysis to assist in determining development prioritisation.

2.2 Key Objectives

The key objective of this report is to develop a trail design plan that:

- Sustainably showcases the unique West Coast environment
- Maximises length of stay and opportunities for repeat visitation
- Develops designs for a network of trails that has significant appeal for visiting riders
- Develops designs for a network of trails that caters for local riding community wants and needs
- Minimises ongoing maintenance and maximises the riding experience by carefully considering the local climate
- Maximises economic development opportunities for the region
- Works to reduce implementation complexity through careful analysis of land tenure and related factors
- Creates a suite of 'hero trail experiences'
- Creates trails for a broad market of riders
- Maximise any project budgets
- Carefully considers operational aspects of the trails (including safety management, maintenance, uplift etc.)

2.3 Project Background

The recent history behind the West Coast mountain bike project will be detailed below. A more comprehensive background can be found in previous relevant reports.

The concept of utilising the growing mountain bike tourism market to contribute economically to the West Coast region has been progressing steadily over the past several years. In 2019 the first formal, purpose-built mountain bike trail was developed in the region at Oonah Hill in Zeehan. This project was developed and funded by the Tasmanian Parks and Wildlife Service (PWS) and marks a shift in the mountain bike experience in the area. While only relatively small in scale (approximately 4km of new trail development), the project has attracted new riders to the area, and has importantly begun establishing the West Coast region as a recognised mountain bike destination.

In early 2019, the West Coast Council engaged *Dirt Art* to develop a concept plan for the development of mountain bike trails within the Greater Queenstown area, along with proposals for a number of other potential trail projects in the region (Mountain Bike Trail Strategy- West Coast, Tasmania 2019 *Dirt Art*). The report proposed the development of a number of gravity-focused mountain bike trail concepts in the Mount Owen area, and a secondary development area in the Heemskirk area near Zeehan. Several trail corridors were proposed in Queenstown, catering for a largely advanced rider audience. This report builds upon the 2019 report, to establish a comprehensive multi-year vision for mountain bike trail development across the region.

During the lead in to the 2019 federal election, the project received a \$2.5m funding commitment from the Coalition Government, funding that is being utilised to undertake this particular project in addition to the existing \$500,000 commitment from the State Government. Part of the Federal grant was to be used to explore future options for further potential Back-Country and Point to Point trail options for the region.

2.4 Establishing the West Coast as a Mountain Bike Destination

To achieve success in an increasingly competitive mountain bike destination market, the West Coast must develop distinct and engaging trail experiences within iconic West Coast landscapes that are of sufficient quality to ensure riders are willing to travel to what are contextually remote locations. Critical to the success of the region is recognising that for many in the target market, the environment, scenery and natural values are of equal, and in some cases greater importance than the trail itself.

The West Coast region offers an excellent opportunity to develop mountain bike trail experiences that are not yet available in Australia for which there is significant, demonstrated demand both domestically and internationally. While the opportunity is great, the West Coast also presents unique challenges in its climate, geology, topography and distance from population centres which serve to define the types of trail infrastructure it is feasible to develop in the area, and the markets that may be targeted through trail infrastructure development.

This plan focuses on development of the following trail styles:

- Stacked loop trail system suitable for beginner and intermediate riders

- Long format backcountry trail riding
- Long format enduro-focused descending (with uplift opportunity where possible)
- Town to town long format bike packing opportunities

3 Market Analysis

3.1 Overview

A current mountain bike market analysis can be found at Appendix 1.

For the purposes of this report, two key specific rider markets will be analysed, which focus on the rider profiles for longer format town-to-town and extended trail riding experiences.

3.2 The Back Country Mountain Bike Rider

Broadly speaking, long format point-to-point mountain bike riding can be considered as two key markets: the cycle touring/rail trail market, and the bike packing mountain bike market. The key differentiator between these markets is that for the cycle touring market, the peripheral experience is the key to a successful riding destination, where riders seek ancillary experiences, and the trail is simply a means to connect these experiences. For the bike packing mountain bike market, the trail experience itself is much more central to the experience, with riders generally seeking high quality singletrack trails.

The cycle touring/rail trail market are generally seeking a more sanitised, often gravel surfaced trail experience, which generally connects townships. The type of riding experience is often matched with food and wine, and other eco-tourism experiences. The most successful rail trails in Australia are located in areas such as North East Victoria, where trails connect towns and a number of boutique food and beverage producers. New Zealand has a large network of rail trails across both north and south islands, which typically connect wine regions and other key destinations.

The second core market is the bike packing market. Broadly speaking, this market involves riders connecting towns and/or camps with more authentic mountain bike trail experiences, at times involving service roads and tracks. There are limited examples of successful bike packing routes in Australia, with the market really in its infancy in the country. New Zealand offers strong examples, such as The Heaphy Track and the Old Ghost Road Track, both of which are internationally renowned multi-day mountain bike experiences serviced by hut accommodation.

For the purposes of this project, *Dirt Art* has elected to focus multi-day riding experiences on connecting towns, therefore avoiding the necessitation or developing remote camps/huts. While the development of camps/huts would open up feasibility of longer riding sections, the development cost and complexity, and narrower rider market opportunity reduces the priority of this type of development. Importantly, the use of towns as nodes for these rides also vastly improves economic development opportunity, particularly in the food and beverage, and accommodation sectors.

3.3 The Adventure Trails Rider

Broadly speaking, 'adventure trails' are riding experiences focused on long-format trail riding, often in remote areas. These trails collate a broad range of experiences in a trail that will typically range from 20-60km in length. Current examples in an Australian context include; Blue Tier Descent (Derby, TAS), Wilderness Trail (Maydena, TAS) and the Thredbo Valley Track (Jindabyne, NSW).

This rider market focuses on the 'competent enthusiast', a rider demographic generally of strong intermediate or above technical ability, and above average fitness. These riders are capable of an uninterrupted 20-40+km ride, with an elevation change of ~1,000m+ per ride.

Notably, this demographic has been broadened by the emergence of the eMTB, which has increased the physical capacity of many riders, broadening the appeal of longer format trail riding.

3.4 Suggested Target Market

Dirt Art suggests targeting the adventure trails rider market, with a focus on competent enthusiast riders. These riders will be motivated to visit through the appeal of longer format adventure rides, with a subset of these riders likely motivated by self-supported town-to-town riding. While this market is not the largest in the mountain bike destination industry, they still represent a large subset of the traveling mountain bike community. Importantly, this focus leverages the key potential of this project, and creates maximum dispersal and length of stay.

The proposed development of major riding hubs in Queenstown and Zeehan provides a strong appeal for the general mountain bike rider, seeking a more structured trail centre experience. While not the major focus of this project, the inclusion of larger trail centres ensures that the broader region will have a diverse mountain bike offering, catering for all areas of the visitor market.

4 Methodology

The project has engaged the following methodology;

4.1 Background Analysis

Dirt Art has undertaken a comprehensive background analysis for the project, including the review of all relevant previous plans and reports. Notably, the majority of relevant literature reviewed occurred during the concept design phase for the project, and can be found within the report, Mountain Bike Trail Strategy- West Coast, Tasmania 2019 *Dirt Art Pty Ltd*.

4.2 Stage 1 Consultation

The first stage of consultation has involved consultation with the following key groups:

- The West Coast Council (WCC)
- West Coast MTB Club (WCMTBC)

This stage of consultation has been high-level and focused on broad concepts only.

Stakeholder consultation will occur during the next stage of the project with the below agencies/groups;

- The Tasmanian Parks and Wildlife Service (PWS)
- Mineral Resources Tasmania (MRT)
- West Coast MTB Reference Group

4.3 Desktop Analysis

Dirt Art has undertaken extensive desktop analysis to determine key areas of potential trail development. Utilising land management and cadastral overlays, *Dirt Art* has avoided areas such as mining leases (where possible), water catchment and private land. All concepts investigated are based on the project concept plan proposed trail corridors.

Dirt Art has utilised desktop analysis to develop a range of trail concepts in readiness for more intense field investigations. These concepts have sought out areas with a range of preferable characteristics, including but not limited to:

- Unwooded areas: minimising construction maintenance costs while maximising rider experience
- Prominent ridgelines: free draining, elevated areas perform better in wet conditions
- North facing slopes: perform better in wet conditions
- Functional trail heads: the proposed network configuration is functional and intuitive for users to navigate

4.4 Field Analysis

Dirt Art has undertaken high-level field analysis of key concept corridors.

4.5 Development of Multi-Factor Analysis

Dirt Art has developed a multi-factor analysis tool to assist in assigning a development priority rating to the trail concepts presented. This analysis tool assesses trail concepts across a wide range of metrics.

4.6 Stage 2 Consultation

The draft report has gone through a public consultation process. Following this process a number of changes have been made to the report.

5 Site Analysis

5.1.1 Overview

The West Coast is defined by the Southern Ocean to the West, Macquarie Harbour to its south, and mountain ranges to its north and east. Relative to the rest of Tasmania the West coast is characterised by high-relief and dominated by the mountains of the West Coast Range, which runs roughly north-south through the area and extends from the peaks of Mount Agnew, Mount Heemskirk north of Zeehan through to Mount Darwin and Sorrell south of Queenstown.

This project investigates trail development opportunities across the entire region, and where relevant some trails may be explored that cross municipal boundaries.

A map of the target region can be found over the page.



5.1.2 Climate

The region has a high annual rainfall, with annual rainfall ranges between 2,000 and 3,000mm. The frequency and intensity of rainfall events combined with the exposure and remoteness of elevated areas of the West Coast reflect an environment not particularly suitable for beginner riders. Experienced, competent riders will in most cases comfortably contend with the challenges provided by the West Coast climate to access trail experiences that are not available elsewhere. Notably, the challenging climate is part of the West Coast riding experience and should be embraced through marketing and promotion of the trails rather than presented as a negative attribute of riding in the area.

While summer will by virtue be the most popular riding season, the trail designs developed in this project have been designed to allow for year-round riding potential (though noting that snow will affect the higher elevation areas of the project at times during winter).

5.1.3 Vegetation

The West Coast is renowned for areas of dense, essentially impenetrable vegetation. There are however areas, natural and modified by human activities that are sparsely vegetated and good sites for the economic development of unique trail products.

Areas of dense vegetation have been avoided due to the increased construction and maintenance costs these areas involve. Locating trails in sparsely vegetated areas will not only minimise establishment and maintenance costs but is essential to provide a distinct experience that will showcase quintessential West Coast environments.

5.1.4 Land Tenure

The target area includes a diverse range of land tenure, including private land and a range of government-managed land types. For the purposes of this project, private land has been avoided.

Where possible *Dirt Art* has aimed to propose trails in a single land tenure, land managed by the Tasmanian Parks and Wildlife Service (PWS). As a majority land manager across the region, PWS is generally the agency managing the most suitable land, and avoids risks associated with permanent and future production forest land managed by Sustainable Timber Tasmania.

5.1.5 Mining lease considerations

A number of mining leases are active in the region, *Dirt Art* has worked to avoid all mining leases where possible. A limited number of trails have been proposed through mining leases. These trails will require negotiation and relevant approvals from lease holders.

Where mining lease holders have an interest in pursuing development through their lease hold, specific projects may be facilitated. During the report process, *Dirt Art* has been approached by one such company, which may provide an opportunity for future trail development.

6 Consultation

6.1 Overview

The project has and will include extensive consultation with a range of organisations, land managers, groups and individuals.

6.2 Key Stakeholders

6.2.1 West Coast Council

The WCC has been consulted throughout the project, including several face-to-face and phone meetings. The WCC are strong supporters of the project and support the present trail design plan.

6.2.2 Tasmanian Parks and Wildlife Service

The PWS are an important stakeholder as the land manager for the area in which the trails are proposed to be constructed.

PWS will be liaised with during the next phase of the project.

6.2.3 Mining and Minerals Tasmania (MMT)

It is highly likely that the final trail concepts will require access to some areas of mining lease, which will require input from MMT and relevant lease holders.

MMT will be liaised with during the next phase of the project.

6.2.4 Destination West Coast (DWC)

DWC will be liaised with during the next phase of the project, now that proposed trail designs are available for review.

6.2.5 West Coast Mountain Bike Club (WCMTBC)

The WCMTBC has recently formed by a group of passionate local riders. The club has an interest in both trail advocacy and racing. The club will be consulted with throughout the project.

The club will be further consulted now design plans have been developed.

6.2.6 Police and Emergency Services

The police and emergency services will be liaised with during the next phase of the project.

6.2.7 Business Community

Dirt Art has had several discussions with the local business community, the majority of which have been held in confidence due to the nature of the attendees' business plans.

The business community will be further consulted now that design plans have been developed.

6.2.8 West Coast MTB Reference Group

A reference group has been created to provide consultation opportunities to a cross section of the community with a keen interest in the West Coast Mountain Bike Project. Now that actual design corridors have been identified, liaison with the Reference Group can occur and feedback incorporated into the final draft document.

6.2.9 Indigenous Community

Consultation with the indigenous community should occur during the next stage of the project, as specific trail concepts are refined. Notably, this consultation may influence the location and construction methodology of some trails.

6.2.10 Community Consultation

The draft report has undergone a period of community consultation, with the report hosted on WCC web site and feedback encouraged. During this period, a number of submissions were received. A summary of key feedback will be provided below, along with responses from *Dirt Art* where relevant.

- General support for the project: the majority of submissions offered strong support for the project.
- Requests and suggestions for more detailed trail design: a number of submissions requested further design detail, and/or suggested specific trail route design options. The majority of these suggestions were captured within existing proposed development zones, and as such should be considered during the next project stage.
- Cultural heritage considerations: it was suggested that further considerations should be made for cultural heritage along trail alignments, including consultation with indigenous communities. This is an important component of the next phase of the project.
- Mining lease considerations: a local mine operator has suggested that further development should be explored within mining lease areas, and that there may be

an opportunity to pursue a project on one of their leasehold areas. *Dirt Art* is liaising with this company separately on behalf of WCC.

- Consideration of impacts on small townships of Granville Harbour and Trial Harbour: the Parks and Wildlife Service noted that infrastructure in both Trial and Granville Harbour is inadequate to service large visitor volumes. It was also noted that large visitor numbers risks affecting the quiet nature of these towns. *Dirt Art* acknowledge that there is a potential risk if trail experiences are poorly planned, and do not consider infrastructure needs. Notably though, the proposed trails are stand-alone, point-to-point trails that will not see mass visitation like a common trail centre. *Dirt Art* believes that visitor numbers and behaviours are highly unlikely to have a negative effect on these towns, as they are proposed as a start/end point only, with visitor servicing to occur in nearby Zeehan.
- Emergency management: the Parks and Wildlife Service has noted that emergency management should be carefully considered. Emergency management will form a major component of the next stage of trail planning, once more detailed routes are available for consideration.
- Vehicle transport and shuttling: representations were received in support of and concerned about a reliance on vehicle shuttling and uplift. Notably, vehicle transport offers a significant opportunity for local business development. Where possible, *Dirt Art* has proposed uplift opportunities, and suggests these should be further explored during future trail planning stages. Due to the distance between towns (and the remote nature of the region itself), it is likely that most visitors will self-drive unless they are on an organised tour.
- Consideration for shared-use trails and motorised trail users: a number of comments were made regarding shared use trails and considerations for motorised trail use. The vast majority of proposed trails are brand-new trail developments, and as such do not affect existing trail users. Many of the new proposed trail concepts may suit shared use (walking and mountain biking), which can be explored during the next stage of the project. Generally speaking, trails without a strong descending focus will be most suitable for shared use. *Dirt Art* do not suggest shared use between motorised and non-motorised trail users.
- Support for a Queenstown to Strahan Trail: support was noted for a trail connecting Queenstown with Strahan. *Dirt Art* explored this concept extensively during the report development, and acknowledges the potential significance of the trail. As the highest cost trail development by a large margin, the trail was prioritised lower than other trails in the MCA. Importantly, a trail such as this may suit unique funding opportunities, and as such may be reprioritised as funding avenues change.

7 Existing and Emerging Trail Destinations

7.1 Overview

The West Coast region has a number of current and emerging mountain bike destinations. The two key destinations are Queenstown and Zeehan, where 35km and 25km (respectively) of trails are under development. The region has a number of other well-known trails, including but not limited to trails such as Oonah Hill, and Sterling Valley.

7.2 Locations

7.2.1 Queenstown

At the time of preparing this report, *Dirt Art* are developing approximately 35km of trails on Mount Owen, directly behind Queenstown. The trail network includes four major descending trails and four loop trails. The trail network starts and finishes in town, via a short commute on Tramway Street.

7.2.2 Zeehan

Zeehan saw the first formal mountain bike trail development on the West Coast, the Oonah Hill Trail. A partial loop connecting with the existing Spray Tunnel Trail, the Oonah Hill Trail caters for a beginner/intermediate audience.

At the time of preparing this report, development approval was being sought for a network of approximately 35km of new trails adjacent to Zeehan in the Heemskirk Ranges. The development integrates with the existing Oonah Hill Trail, taking riders to the virtual summit of Mount Agnew.

7.2.3 Rosebery/Tullah

Tullah and Rosebery are the base for two of the more popular existing mountain bike trails on the West Coast; Montezuma Falls and the Sterling Valley Track. Based out of Rosebery, following the North East Dundas Tramway, the Montezuma Falls Track is largely wide service tracks, where the appeal is on the natural values and scenery as opposed to the riding experience itself. The falls and the swinging bridge across them are a major drawcard of the ride.

The Sterling Valley Track is a popular remote wilderness ride suitable only for advanced riders. The trail descends down into the township of Rosebery, through stunning wilderness terrain. Much of the distance is made up of service roads.

7.2.4 Strahan

While the township of Strahan has very limited trail infrastructure, the town does act as a major service node for travelling riders. The Ocean Beach Track is the one formal trail in the area suitable for mountain bike riding. The short, beginner-friendly trail takes riders through sand dunes to Ocean Beach.

Active Strahan are developing an extension of the Ocean Beach Trail into the town centre in Strahan.

8 Proposed Development

8.1 Overview

For the purposes of this project, the region has been divided into primary and secondary nodes. A map of the proposed nodes can be found over the page. These development zones have been proposed to organise a hierarchy of trail destinations, which is matched to existing commercial and public visitor infrastructure, while ensuring major nodes are proposed in areas with the highest trail development potential.

8.2 Interaction with Other Trail Users

The trail concepts provided in this report are high level development corridors only, and do not represent final trail alignments. The concepts provided are proposed predominantly as new, purpose-built trails, and utilise little or in most cases no existing trails. Considerations around interaction and potential conflicts with other trail users (motorised and non-motorised) will be considered during the next phase of the project. As a general principle, trail users should be separated where possible, particularly non-motorised and motorised users.

8.3 Land Tenure

Given the high-level nature of the concept corridors, land tenure and leasing overlays (such as mining leases) have not been thoroughly considered at this stage of the project. Trail concept corridors will require extensive adjustment during the next phase of the project. Mining leases should be avoided as a general principle, with a focus on utilising a single crown land tenure where possible. For the purposes of this project, *Dirt Art* suggest trail corridors focus on WCC or PWS managed land where possible, with Sustainable Timber Tasmania managed land to be utilised where required.

8.4 Development Zones

8.4.1 Overview

Dirt Art has worked to establish a number of nodes across the region. Primary nodes have been established in Queenstown and Zeehan, with Secondary nodes in Strahan, Rosebery, Tullah and Trial Harbour. The proposed trail developments have worked to establish peak visitation in primary nodes, while actively encouraging dispersal into secondary nodes. This focus will ensure riders have access to the tourism amenities of larger towns, while providing significant opportunity for business development to cater to the visitor market in smaller regional towns.

8.5 Prioritisation Matrix

8.5.1 Overview

Dirt Art has developed a scoring matrix to aid in prioritisation of trail development across the region. The matrix ranks potential trail developments across a wide range of objective and subjective criteria. The prioritisation matrix is intended as a guide only, with an expectation that from time-to-time priorities may be adjusted to match funding opportunities and other external factors.

Notably, the prioritisation matrix does not consider locally driven prioritisation for reasons such as specific targeting of visitation and economic benefit to specific areas. The matrix provides a broad overview of prioritisation, though the final determination of project staging may be influenced by a range of other factors.

8.5.2 Matrix Criteria

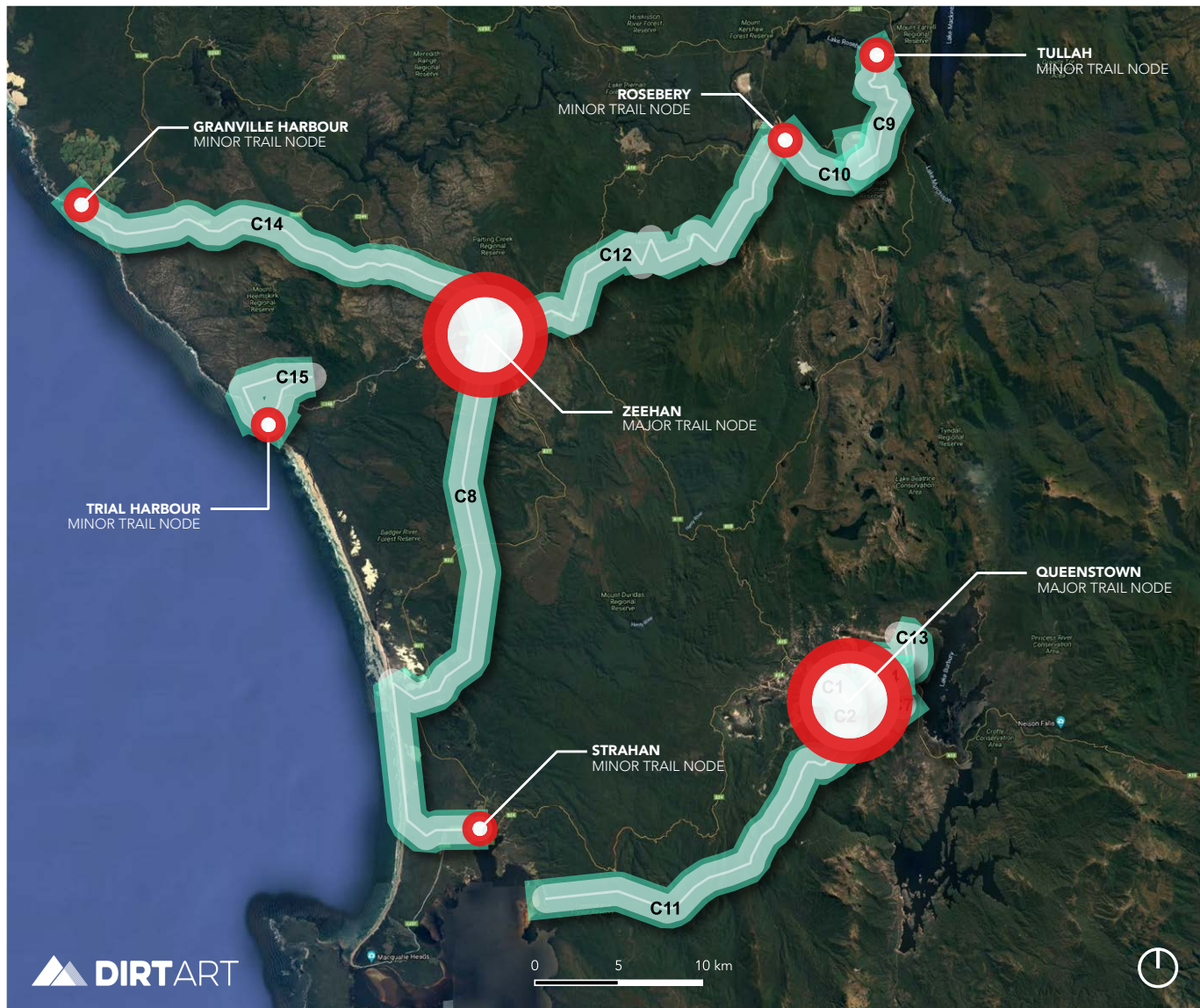
The below 10 criteria will each be provided a score of 1-5, with five being the highest rating and one being the lowest rating. Trails scoring the highest overall scoring are considered the highest development priorities.

1. Land tenure: for the purposes of this report, land tenure will be ranked highest for crown land with a single management authority of West Coast Council, and/or the Tasmanian Parks and Wildlife Service. Due to risks associated with future harvesting, land managed by Sustainable Timber Tasmania will be ranked lowest of the crown land. Mining leases and related lease overlays will further reduce the scoring for land tenure. Private land will be the lowest ranked land tenure as this land tenure provides the most challenging development conditions.
2. Development approval complexity: Development approval complexity may be affected by a wide range of factors. For the purposes of this report, development in high-value natural areas will be scored lower than in lower value areas. Development approval complexity also includes areas where cultural heritage values may affect the viability of the project. A lower score will also be attributed to trail projects with competing social, environmental and/or cultural values.
3. Construction complexity/cost: trails with a higher construction complexity and therefore cost will be ranked lower than trails with lower development complexity/cost. Factors affecting these criteria include steep side slopes, rock terrain and dense vegetation. Complexity and cost may also be ranked lower where extensive platforms or bridges are required, particularly where these are located in remote areas.
4. Operational complexity/cost: Operational complexity and cost are affected by a wide range of factors, including but not limited to; remoteness, climate and general trail sustainability. A lower ranking for this criterion indicates that trails will have a comparatively high ongoing management complexity and cost.

5. Trail experience: this criterion relates to the style of trail being offered, and it's appeal to a broad market of riders. The criteria relate to the trail experience itself, rather than the surrounding environment.
6. Environmental experience: this criterion relates to the user experiences surrounding the trail tread. A higher score will be attributed to trails with stunning views, intact native forests and appealing landmarks. A lower score will be attributed to urban and/or disturbed areas.
7. Proximity to town/s and infrastructure: proximity to towns and infrastructure improves the experience for riders while also resulting in greater economic benefits for the region. Trails within close proximity to towns and services will be scored higher than trails located in remote, un-serviced areas.
8. Connectivity with existing trail experiences: trails located within proximity to other existing trails will be rated higher than stand-alone trail experiences. Creating a larger regional node/s of trails promotes longer stays and will appeal to riders wanting to base themselves in single locations for longer periods.
9. Broad rider audience: this criterion relates to the capacity of the proposed development to cater to a broad audience of riders.
10. Local recreational appeal: this criterion relates to the value the trail/s will bring to a local riding audience. High ranking in this criterion indicates that trail/s provide for local recreation.

8.5.3 Interpreting the Multi Factor Analysis

The maximum available score for each trail/trail area is 50/50. The higher the score, the higher the development priority of the trail.



8.5.4 Mount Owen Trail Zone

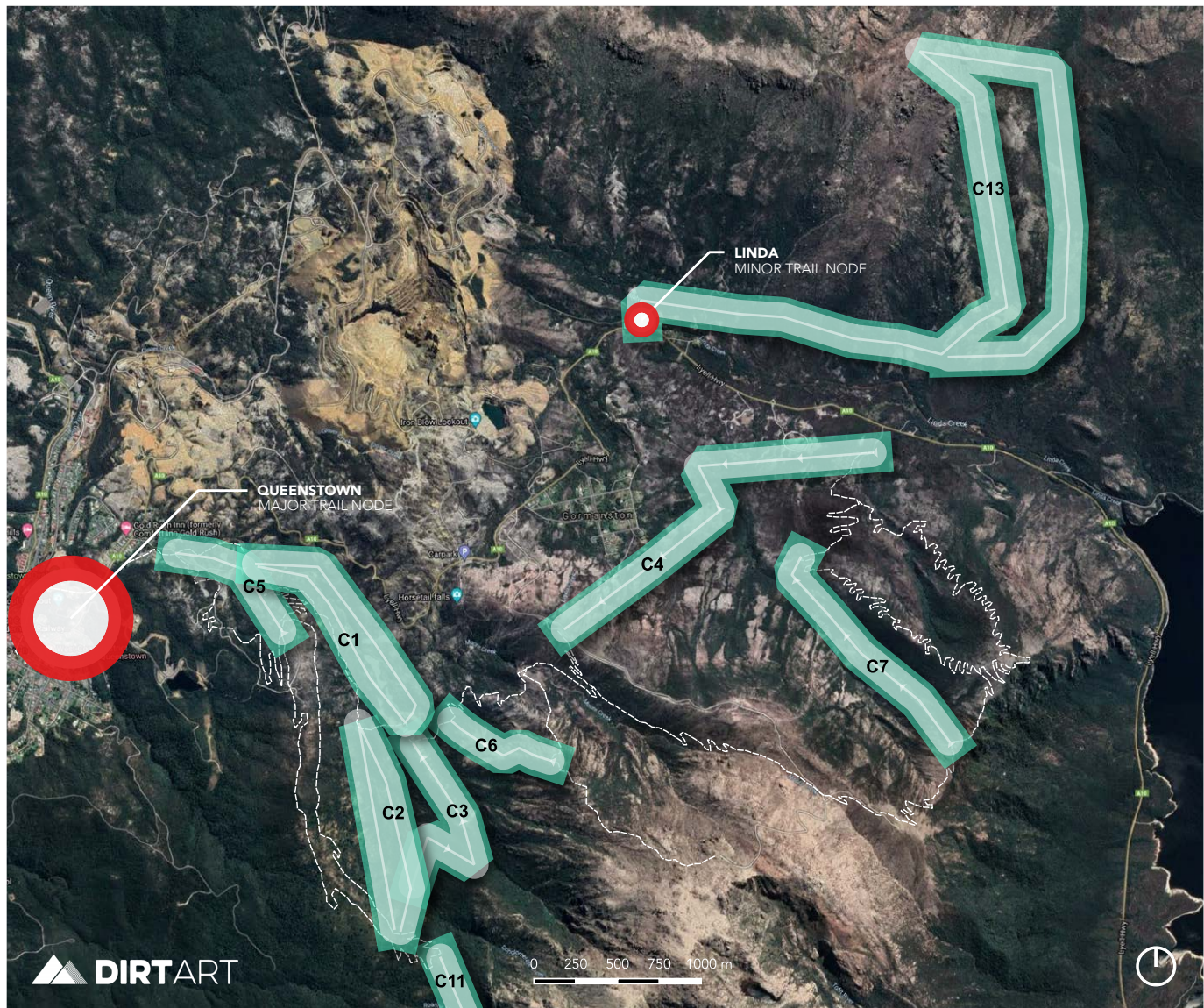
The Mount Owen trail zone has been included as a single trail development, despite multiple individual trails being proposed. The proposed development adds significant trail volume and diversity to the existing Mount Owen trail network, encouraging greater visitation and longer stays. The proposed new trails build upon existing trail experiences to increase descending trail options, and increase trail riding options, resulting in development of a 3-4-day riding destination for visiting riders. While it is suggested that this project be developed as a single stage, there are options to break the development down into smaller individual development stages.

Key trails proposed for this area will include a link from Linda to the Waterfall Trail, a valley trail network to the base of Horsetail Falls, and a number of new linking trails.

A summary of the proposed development can be found below.

Length	25km (approx.)
TDRS	All
Style	Various
Format	Various
Construction accessibility	Average
Built infrastructure	Nil
Estimate average build cost (Lin. M)	\$60.00

A map detailing potential trail development corridors can be found over the page.



8.5.5 Rating Matrix

Criteria	Ranking				
1. Land tenure					
2. Approvals complexity					
3. Construction complexity					
4. Operational complexity					
5. Trail experience					
6. Environmental experience					
7. Proximity to towns					
8. Connectivity to existing trails					
9. Broad riding audience					
10. Local recreational appeal					
Total Score	44				

8.5.6 Analysis of Criteria Scoring

8.5.6.1 Land Tenure

The land tenure where all trails are proposed is crown land, managed by the PWS. This land tenure provides a single management authority and statutory approvals process. A score of four rather than five represents the need to pass through areas of mining lease, which adds to approvals complexity.

8.5.6.2 Approvals Complexity

The proposed development area resides within a reserve at the lower classification for conservation values with PWS reserves. The scoring of four rather than five for approvals complexity relates to the requirement to negotiate development within areas held under mining leases.

8.5.6.3 Construction Complexity

Construction complexity across the Mount Owen site is highly-variable, though some areas of the site do involve extremely complex construction conditions. Areas of good construction balance out the general complexity to a score of three out of five.

8.5.6.4 Trail Experience

The type of trail experience provided by this development zone is highly varied, though is generally quite rocky and technical. This rocky, technical terrain provides opportunity to create engaging trails that provide multiple line options, and ultimately cater for the broadest possible audience.

8.5.6.5 Environmental Experience

The environmental experience of this trail zone is largely focused on the stunning views offered from the mountain slopes, which are generally denuded of significant vegetation. The dramatic views elevate the proposed network to a very high scoring for environmental experience.

8.5.6.6 Proximity to Towns

The proposed trail area offers direct integration with the towns of Queenstown and Linda. Importantly, the proposed trails also improve connectivity to townships for the existing Mount Owen trails currently under development.

8.5.6.7 Connectivity to Existing Trails

The proposed new trail development integrates directly with the new Mount Owen trails currently under development. The trails add improved connectivity options and a greater diversity in trail experiences to the current trail network.

8.5.6.8 Broad Rider Audience

The trail development will have strong appeal to a broad audience of riders. The rocky, harsh terrain and significant elevation range result in the development not having the strongest appeal for beginner riders. For this reason, a rating of four has been assigned.

8.5.6.9 Local Recreational Appeal

The proposed development has very strong appeal for local recreational riders. The new proposed trails increase trail riding opportunities, reducing the requirements for paid uplift, while better connecting towns, and providing more loop riding options for frequent visitors.

8.5.7 Trial Harbour Trail Zone

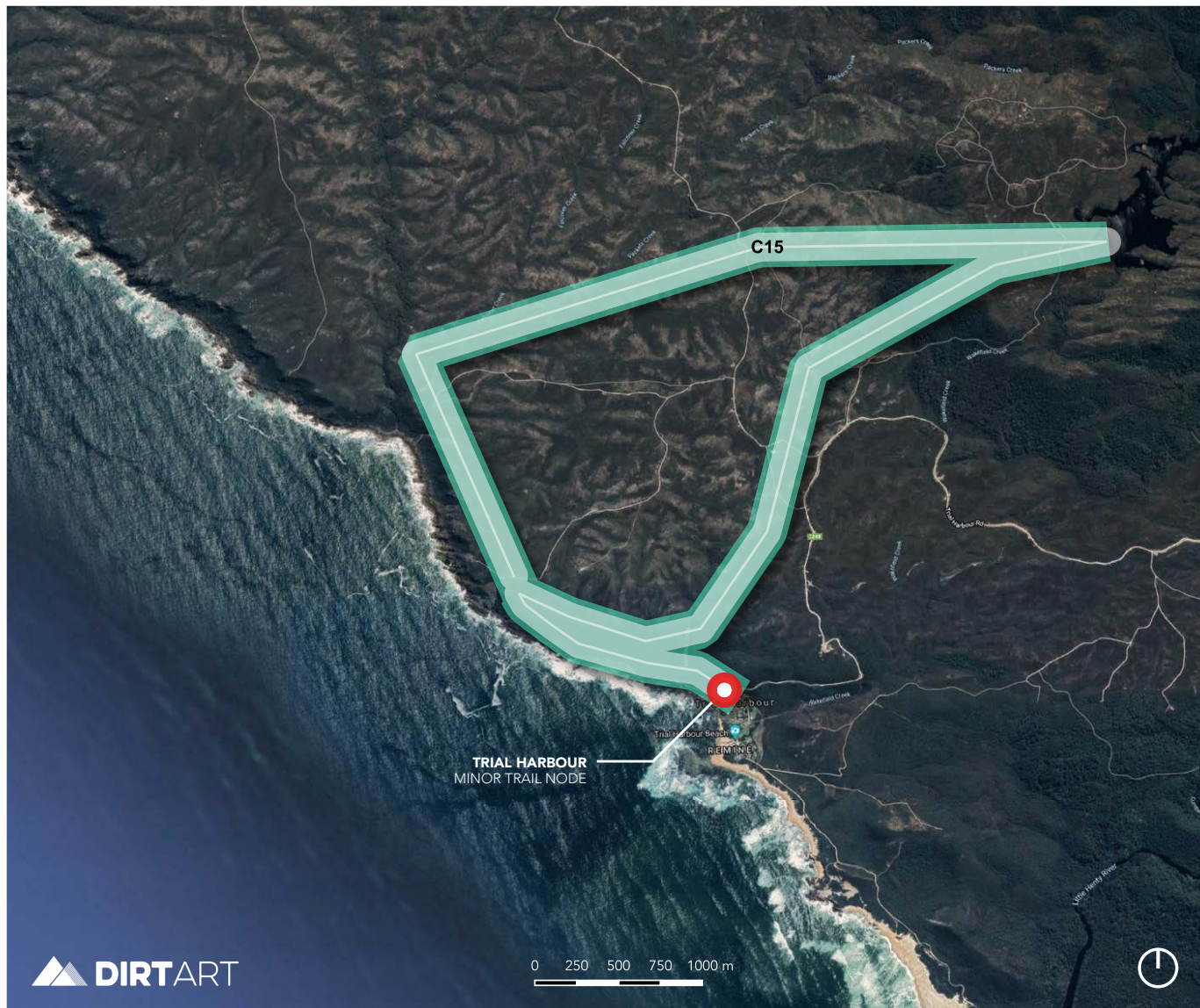
The Trial Harbour trail zone offers a stunning coast mountain bike experience that is proximal to the small fishing village of Trial Harbour. The trail zone capitalizes on a 500m (approx.) elevation range and stunning mountain and coastal views. There is opportunity to potentially utilise the new private road to the Lake Cumberland Dam as a commercial uplift route.

The trail zone offers a number of trail experiences that may be developed as singular trails, or a combined single project stage.

A summary of the proposed development can be found below.

Length	25km (approx.)
TDRS	Blue Square, Black Diamond
Style	Adventure Ride/s
Format	Point to Point
Construction accessibility	Average
Built infrastructure	Nil
Estimated average build cost (Lin. M)	\$45.00

A map detailing potential trail development corridors can be found over the page.



8.5.8 Rating Matrix

Criteria	Ranking				
1. Land tenure					
2. Approvals complexity					
3. Construction complexity					
4. Operational complexity					
5. Trail experience					
6. Environmental experience					
7. Proximity to towns					
8. Connectivity to existing trails					
9. Broad riding audience					
10. Local recreational appeal					
Total Score	40				

8.5.9 Analysis of Criteria Scoring

8.5.9.1 Land Tenure

The land tenure where all trails are proposed is crown land, managed by the PWS. This land tenure provides a single management authority and statutory approvals process. A score of four rather than five represents the need to pass through areas of mining lease, which adds to approvals complexity.

8.5.9.2 Approvals Complexity

The proposed development area resides within a reserve at the lower classification for conservation values with PWS reserves. The scoring for approvals complexity relates to the requirement to negotiate development within areas held under mining leases.

It is anticipated that the coastal areas of the trail will potentially require extensive assessment for cultural heritage, resulting in an approvals rating of three.

8.5.9.3 Construction Complexity

Construction complexity across the site is highly-variable, though some areas of the site do involve extremely complex construction conditions. Areas of good construction balance out the general complexity to a score of three out of five.

8.5.9.4 Trail Experience

The type of trail experience provided by this development zone is highly varied, though is generally quite rocky and technical, before moving into more generic granite soils at lower elevations. This rocky, technical terrain provides opportunity to create engaging trails that provide multiple line options, and ultimately cater for the broadest possible audience.

There may be an opportunity to provide an uplift to service this trail, travelling to the high point above Lake Cumberland. Such as service would be subject to relevant approvals.

8.5.9.5 Environmental Experience

The environmental experience of this trail zone is largely focused on the stunning views offered across the coast and to Ocean Beach. The dramatic views elevate the proposed network to a very high scoring for environmental experience.

8.5.9.6 Proximity to Towns

The proposed trail development integrates directly with the tiny coastal town of Trial Harbour, where there are currently no commercial visitor services and very limited infrastructure. While a direct link to the larger township of Zeehan is possible via gravel roads, no direct trail link is provided.

8.5.9.7 Connectivity to Existing Trails

The proposed new trail development does not directly integrate with existing trails. Despite this, the network adds significant value to the Mount Agnew trail network that is currently under development. This trail network will keep riders for an extra 1-2 days in the township of Zeehan, maximising economic benefit.

8.5.9.8 Broad Rider Audience

The trail development will have strong appeal to a broad audience of riders, with a focus on intermediate-advanced riders, who make up the majority of the destination mountain biking audience. The trail network does not cater for beginner riders.

8.5.9.9 Local Recreational Appeal

The proposed development will cater well for local riders wanting a day trip, though offers limited appeal for rides seeking a short ride near population areas.

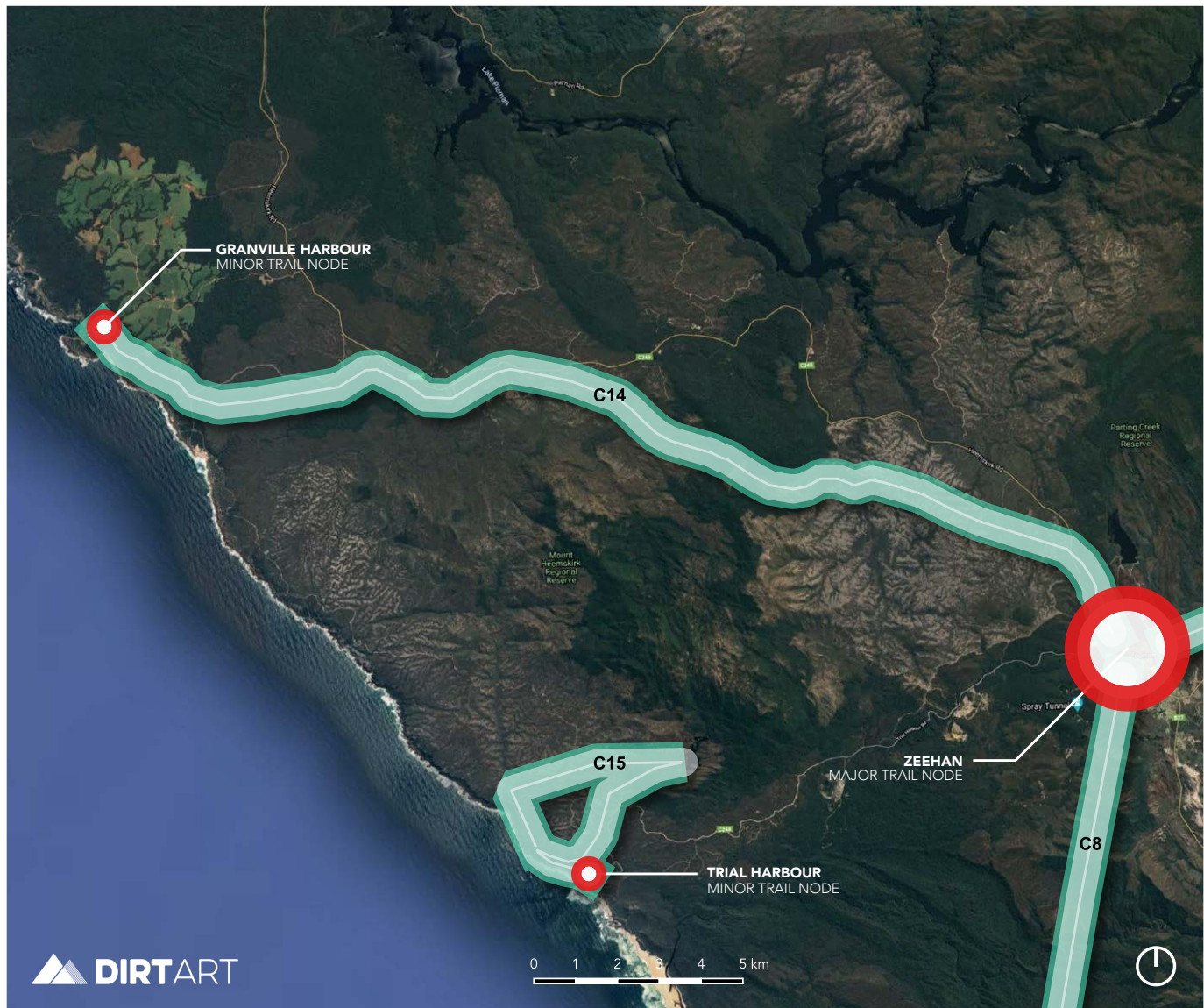
8.5.10 Granville Harbour to Zeehan Trail

This trail is a back-country point-to-point ride connecting Granville Harbour With Zeehan, via the Heemskirk Ranges and Heemskirk Falls. The trail is a quintessential back country trail ride, with a large elevation range and stunning scenery across button grass plains. The intent of the trail is to add another full day riding experience to the Greater Zeehan area, promoting longer stays and/or repeat visits.

A summary of the proposed development can be found below.

Length	25km (approx.)
TDRS	Blue Square, Black Diamond
Style	Adventure Ride/s
Format	Point to Point
Construction accessibility	Average
Built infrastructure	Nil
Estimated average build cost (Lin. M)	\$45.00

A map detailing potential trail development corridors can be found over the page.



8.5.11 Rating Matrix

Criteria	Ranking				
1. Land tenure					
2. Approvals complexity					
3. Construction complexity					
4. Operational complexity					
5. Trail experience					
6. Environmental experience					
7. Proximity to towns					
8. Connectivity to existing trails					
9. Broad riding audience					
10. Local recreational appeal					
Total Score	38				

8.5.12 Analysis of Criteria Scoring

8.5.12.1 Land Tenure

The land tenure where the trail is proposed is crown land, managed by the PWS. This land tenure provides a single management authority and statutory approvals process. A score of four rather than five represents the need to pass through areas of mining lease, which adds to approvals complexity.

8.5.12.2 Approvals Complexity

The proposed development area resides within a reserve at the lower classification for conservation values with PWS reserves. The scoring for approvals complexity relates to the requirement to negotiate development within areas held under mining leases.

8.5.12.3 Construction Complexity

Construction complexity across the site is variable, though generally good. The reduced scoring for this criterion relates to the remoteness of some trail sections.

8.5.12.4 Trail Experience

The type of trail experience provided by this development is generally a back-country trail ride. There are options to develop some technical trail sections, though the riding experience is more focused on the environmental experience.

8.5.12.5 Environmental Experience

The environmental experience of this trail zone is largely focused on the stunning views offered across button grass plains. The dramatic views elevate the proposed network to a very high scoring for environmental experience.

8.5.12.6 Proximity to Towns

The proposed trail development integrates directly with the township of Zeehan at the end of the ride. There are options to integrate into Granville Harbour, though notably there are limited visitor amenities and no commercial services in the town.

8.5.12.7 Connectivity to Existing Trails

The proposed new trail development directly connects into the Oonah Hill Trail and the Mount Agnew trails currently under development. Despite this, given the nature and length of the trail, it is unlikely that many riders will combine it with large sections of the other existing and under development trails. By virtue, the trail has been proposed as a stand-alone trail experience.

8.5.12.8 Broad Rider Audience

The trail development will have strong appeal to a broad audience of riders, with a focus on intermediate-advanced riders, who make up the majority of the destination mountain biking audience. The trail network does not cater for beginner riders.

8.5.12.9 Local Recreational Appeal

The proposed development will cater well for local riders wanting a day trip, though offers limited appeal for riders seeking a short ride near population areas.

8.5.13 Rosebery Trail Zone

The Rosebery trail zone focuses on the area surrounding the existing Sterling Valley Trail. The Sterling Valley Trail is popular with experienced riders, though has generally poor connectivity at the entry and exit of the trail. *Dirt Art* has proposed a new entry and exit to the trail, as well as proposing a new parallel trail that caters for intermediate riders. Notably, *Dirt Art* do not propose that the character and/or challenging nature of the existing trails be modified. The new proposed trails will diversify the riding experience in Rosebery, while also capitalising on ~350m elevation range, and the potential for a sealed shuttle road pending further investigation in regards to traffic management and parking.

A summary of the proposed development can be found below.

Length	15km (approx.)
TDRS	Blue Square, Black Diamond
Style	Adventure Ride/s
Format	Point to Point
Construction accessibility	Average
Built infrastructure	Nil
Estimated average build cost (Lin. M)	\$50.00

A map detailing potential trail development corridors can be found over the page.

8.5.14 Rating Matrix

Criteria	Ranking				
1. Land tenure					
2. Approvals complexity					
3. Construction complexity					
4. Operational complexity					
5. Trail experience					
6. Environmental experience					
7. Proximity to towns					
8. Connectivity to existing trails					
9. Broad riding audience					
10. Local recreational appeal					
Total Score	41				

8.5.15 Analysis of Criteria Scoring

8.5.15.1 Land Tenure

The land tenure where the trail is proposed is crown land, managed by the PWS. This land tenure provides a single management authority and statutory approvals process. A score of four rather than five represents the need to pass through areas of mining lease, which adds to approvals complexity.

8.5.15.2 Approvals Complexity

The proposed development area resides within a reserve at the lower classification for conservation values with PWS reserves. The scoring for approvals complexity relates to the requirement to negotiate development within areas held under mining leases.

8.5.15.3 Construction Complexity

Construction complexity across the site is variable, though generally good. The reduced scoring for this criterion relates to the risk associated with wet trail sections, and with areas of dense vegetation.

8.5.15.4 Trail Experience

The type of trail experience provided by this development is generally a network of enduro-focused trails. There is opportunity for some natural terrain features in rockier areas.

8.5.15.5 Environmental Experience

The proposed trails are generally located in a rainforest environment, providing a point of difference from many of the other button grass and denuded proposed development sites. This stunning forest type will be highly appealing for riders.

8.5.15.6 Proximity to Towns

The proposed trail development integrates directly with the township of Rosebery at the end of the ride.

8.5.15.7 Connectivity to Existing Trails

The proposed new trail developments integrate directly with the existing Sterling Valley Trail, providing improvements and greater optionality to the existing trail.

8.5.15.8 Broad Rider Audience

The trail development will have strong appeal to a broad audience of riders, with a focus on intermediate-advanced riders, who make up the majority of the destination mountain biking audience. The trail network does not cater for beginner riders.

8.5.15.9 Local Recreational Appeal

The proposed trails require an uplift to access, though there may be future potential to create shorter loop/s closer to Rosebery if demand grows. The uplift nature of the trails may limit their potential for local recreational use.

8.5.16 Tullah to Rosebery Trail

Tullah can currently be connected to Rosebery via a network of sealed roads, service tracks and the existing Sterling Valley Trail. This new proposed connecting trail will upgrade trail sections and provide new sections of trail to provide a high-quality intermediate trail ride connecting the two towns. At approximately 30km in length, the trail will be suitable for most riders to achieve in a comfortable day trip.

Dirt Art has developed a preliminary concept that utilises the verges of Lake Tullah. An alternative concept would be to begin the trail in an easterly direction, utilising the ridgeline on the south western edge of Lake Mackintosh, before utilising the dam wall as a crossing. This alignment would be notably much longer, ruling out the ride for less experienced riders.

A summary of the proposed development can be found below.

Length	30km (approx.)
TDRS	Blue Square
Style	Adventure Ride/s
Format	Point to Point
Construction accessibility	Average
Built infrastructure	Nil
Estimated average build cost	\$45.00

A map detailing potential trail development corridors can be found over the page.

8.5.17 Rating Matrix

Criteria	Ranking				
1. Land tenure					
2. Approvals complexity					
3. Construction complexity					
4. Operational complexity					
5. Trail experience					
6. Environmental experience					
7. Proximity to towns					
8. Connectivity to existing trails					
9. Broad riding audience					
10. Local recreational appeal					
Total Score	38				

8.5.18 Analysis of Criteria Scoring

8.5.18.1 Land Tenure

The land tenure where the trail is proposed is predominantly crown land, managed by the PWS. This land tenure provides a single management authority and statutory approvals process. A score of four rather than five represents the need to pass through areas of road reserve and through areas close to residential property surrounding Lake Tullah. There would be scope to adjust this alignment if required.

8.5.18.2 Approvals Complexity

The proposed development area resides within a reserve at the lower classification for conservation values with PWS reserves. The scoring for approvals complexity relates to the requirement to negotiate development within areas held under mining leases.

Social considerations around Lake Tullah may prompt realignments to avoid proximity to private property.

8.5.18.3 Construction Complexity

Construction complexity across the site is variable, though generally good. The reduced scoring for this criterion relates to the risk associated with wet trail sections, and with areas of dense vegetation.

8.5.18.4 Trail Experience

The general trail experience is a back-country trail ride with a meaningful climb and descent. The trail format and experience will be popular with riders.

8.5.18.5 Environmental Experience

The proposed trails are generally located in a rainforest environment, providing a point of difference from many of the other button grass and denuded proposed development sites. This stunning forest type will be highly appealing for riders.

Some urban areas and road sections have reduced the scoring for these criteria.

8.5.18.6 Proximity to Towns

The proposed trail development integrates directly with the townships of Tullah and Rosebery. This format allows riders to refuel and potential stay overnight in either/both towns, providing a significant opportunity for local business.

8.5.18.7 Connectivity to Existing Trails

The proposed new trail development directly connects to the existing Sterling Valley Trail, which would be utilised for the final descending section of the trail. An alternative intermediate descending section is also proposed to complete the trail into Rosebery.

8.5.18.8 Broad Rider Audience

The trail development will have strong appeal to a broad audience of riders, with a focus on intermediate-advanced riders, who make up the majority of the destination mountain biking audience. The trail network does not cater for beginner riders, though the lake verge section of trail in Tullah may be suitable for a beginner audience and potentially for shared use with walkers.

8.5.18.9 Local Recreational Appeal

The proposed trail has some local recreational appeal, particularly on the verge of Lake Rosebery. Is not expected that the local interest in the complete town-to-town concept will be particularly strong.

8.5.19 Rosebery to Zeehan Trail

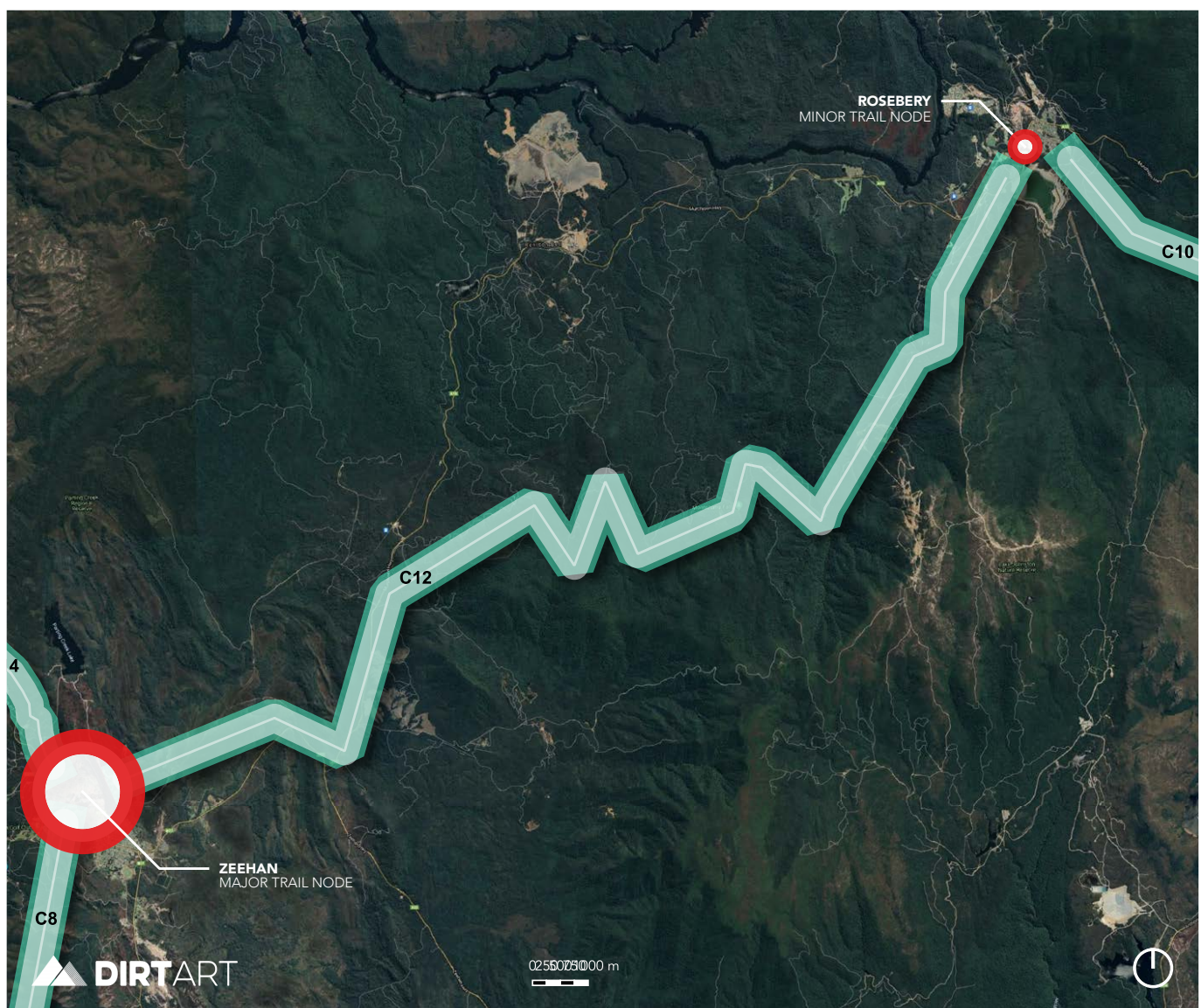
There are currently connections from Rosebery to Zeehan via a patchwork of trails and service roads, including the cluster of trails that form the Montezuma Falls Trail. *Dirt Art* suggest that the first 5km of the Montezuma Falls Track is a functional component of the town-to-town connection, though the remainder of the trail would be best avoided, with a new purpose-built trail section.

The newly developed trail would require a ride of approximately 40km, making it achievable by most riders. A highlight of the ride would be the Montezuma Falls themselves, with the suspension bridge also a novelty of the experience.

A summary of the proposed development can be found below.

Length	40km (approx.)
TDRS	Blue Square
Style	Adventure Ride/s
Format	Point to Point
Construction accessibility	Average
Built infrastructure	Nil
Estimated average build cost (Lin. M)	\$45.00

A map detailing potential trail development corridors can be found over the page.



8.5.20 Rating Matrix

Criteria	Ranking				
1. Land tenure					
2. Approvals complexity					
3. Construction complexity					
4. Operational complexity					
5. Trail experience					
6. Environmental experience					
7. Proximity to towns					
8. Connectivity to existing trails					
9. Broad riding audience					
10. Local recreational appeal					
Total Score	34				

8.5.21 Analysis of Criteria Scoring

8.5.21.1 Land Tenure

The land tenure where the trail is proposed is predominantly crown land, managed by the PWS. This land tenure provides a single management authority and statutory approvals process. A score of three rather than five represents the need to pass through areas of road reserve and adjacent and potentially through other crown land tenures.

8.5.21.2 Approvals Complexity

The proposed development area resides within a reserve at the lower classification for conservation values with PWS reserves.

8.5.21.3 Construction Complexity

Construction complexity across the site is variable, though generally good. The reduced scoring for this criterion relates to the risk associated with wet trail sections, and with areas of dense vegetation. Access is remote and challenging for some sections of the trail.

8.5.21.4 Trail Experience

The general trail experience is a back-country trail ride. Without a major elevation change, this trail will be less about the trail and more about the surrounding environment. The trail format and experience will be popular with riders.

8.5.21.5 Environmental Experience

The proposed trails are generally located in a rainforest environment, providing a point of difference from many of the other button grass and denuded proposed development sites. This stunning forest type will be highly appealing for riders.

The addition of the Montezuma Falls and suspension bridge add significantly to the environmental appeal of the trail.

8.5.21.6 Proximity to Towns

The proposed trail development integrates directly with the townships of Zeehan and Rosebery. This format allows riders to refuel and potential stay overnight in either/both towns, providing a significant opportunity for local business.

8.5.21.7 Connectivity to Existing Trails

The proposed new trail development utilises with section/s of the Montezuma Falls Track, and also potentially uses other existing trails in the area.

8.5.21.8 Broad Rider Audience

The trail development will have strong appeal to a broad audience of riders, with a focus on intermediate-advanced riders, who make up the majority of the destination mountain biking audience. The trail network does not cater for beginner riders, though the first section of the Montezuma Falls Track caters for this rider market.

8.5.21.9 Local Recreational Appeal

Sections of the trail may appeal to a local rider market, though this is generally more of a tourism-focused trail experience.

8.5.22 Zeehan to Strahan Trail

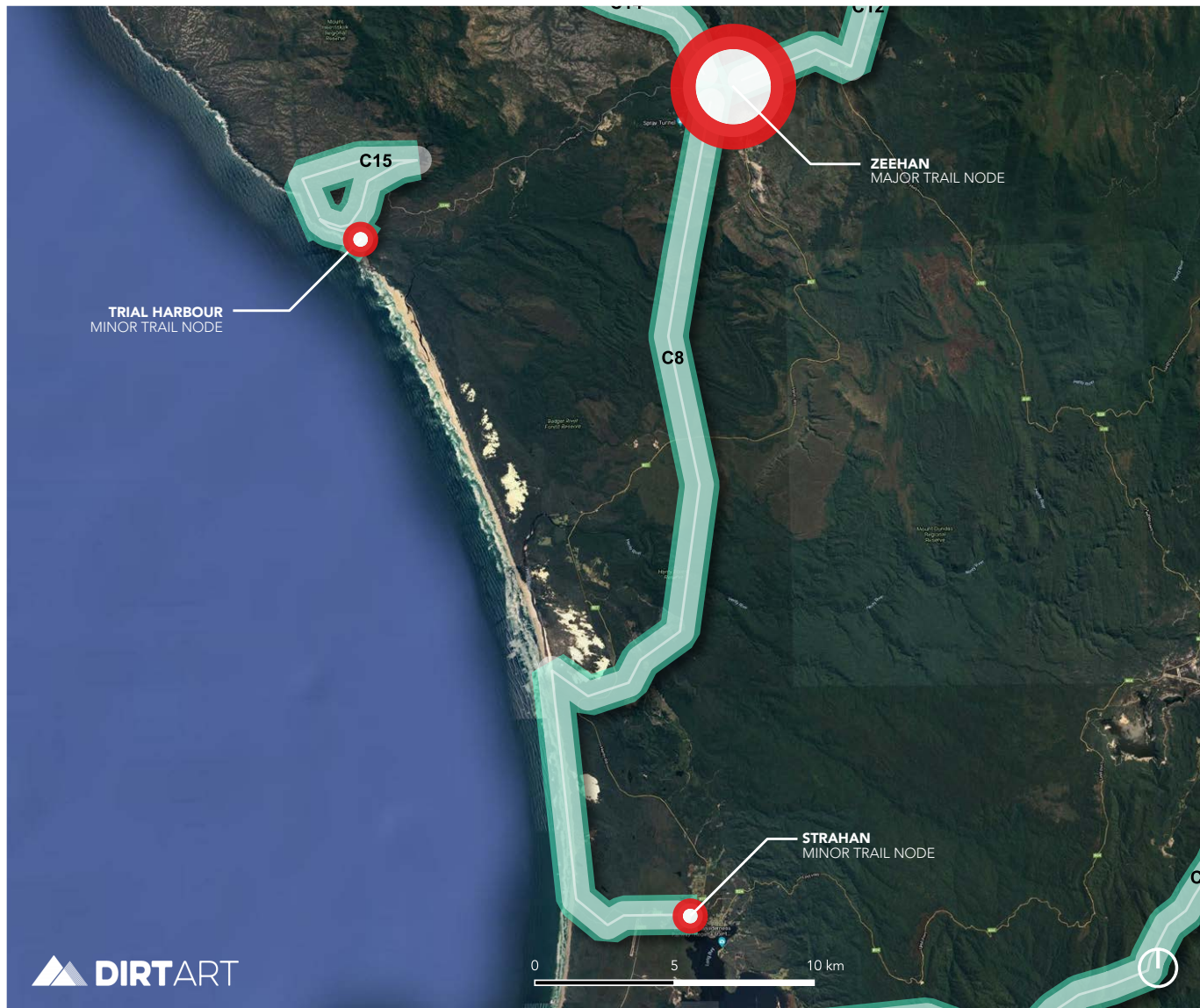
This section of trail takes in the button grass plains to the east of Ocean Beach, before utilising a section of trail along the beach, and finishing with the Ocean Beach Track back into the outskirts of Strahan.

At approximately 50km, this will be a longer ride than the other town to town concepts, though the flat beach section will reduce the overall difficulty of the trail.

A summary of the proposed development can be found below.

Length	50km (approx.)
TDRS	Blue Square
Style	Adventure Ride/s
Format	Point to Point
Construction accessibility	Average
Built infrastructure	Nil
Estimated average build cost (Lin. M)	\$45.00

A map detailing potential trail development corridors can be found over the page.



8.5.23 Rating Matrix

Criteria	Ranking				
1. Land tenure					
2. Approvals complexity					
3. Construction complexity					
4. Operational complexity					
5. Trail experience					
6. Environmental experience					
7. Proximity to towns					
8. Connectivity to existing trails					
9. Broad riding audience					
10. Local recreational appeal					
Total Score	32				

8.5.24 Analysis of Criteria Scoring

8.5.24.1 Land Tenure

The land tenure where the trail is proposed is predominantly crown land, managed by the PWS. This land tenure provides a single management authority and statutory approvals process.

8.5.24.2 Approvals Complexity

Approvals for this trail will likely require negotiation with both the PWS and Sustainable Timber Tasmania and may be affected by some harvesting schedules and other forest industry considerations. The additional of permanent and future production forest land requires a more complex, carefully considered planning approach.

8.5.24.3 Construction Complexity

The construction of this trail offers no significant challenges, though some areas are remote, and other areas may pose issues with sandy soils.

8.5.24.4 Trail Experience

The general trail experience is a back-country trail ride with a meaningful climb and descent. The length and remoteness of the trail would make it challenging for many riders.

8.5.24.5 Environmental Experience

The environmental experience of this trail is generally strong, offering stunning views across Ocean Beach and the coastal dunes. Button grass plains compose the initial part of the trail close to Zeehan.

8.5.24.6 Proximity to Towns

The proposed trail development integrates directly with the townships of Zeehan and Strahan. This format allows riders to refuel and potential stay overnight in either/both towns, providing a significant opportunity for local business.

8.5.24.7 Connectivity to Existing Trails

The proposed new trail development connects with the Ocean Beach trail at Strahan, otherwise this is proposed as a stand-alone trail experience.

8.5.24.8 Broad Rider Audience

The remoteness and challenging nature of this trail means that the experience is only suitable for a relatively narrow rider audience.

8.5.24.9 Local Recreational Appeal

The proposed trail has very limited local recreational appeal.

8.5.25 Mount Lyell Loop

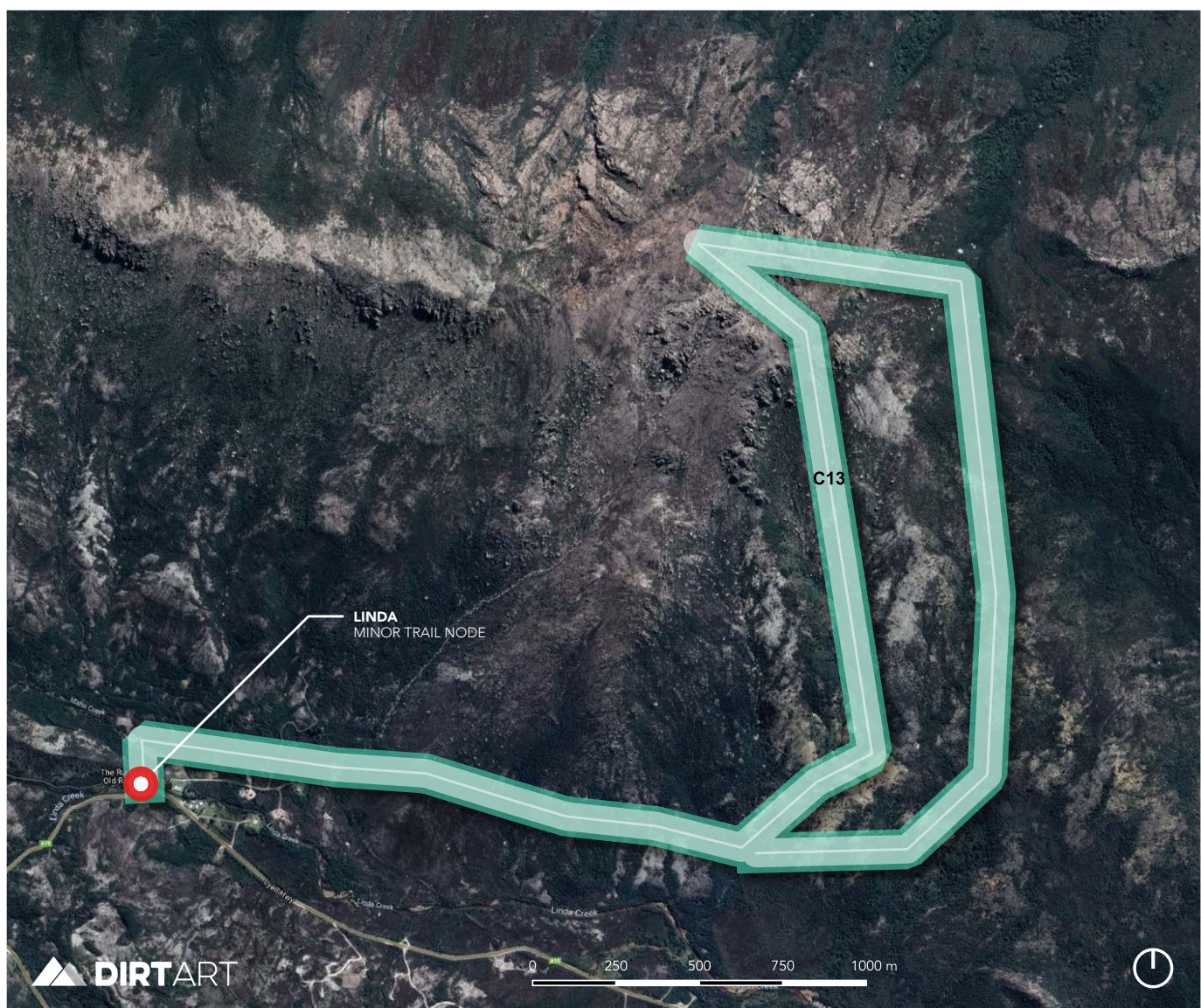
This trail would begin and end in Linda, utilising a dual directional trail section built on an old road bench at the foot of Mount Lyell. Beyond this trail section a loop would be constructed up towards the summit of Mount Lyell. The trail builds on the trail opportunity adjacent to Queenstown and Linda, to create a longer duration of stay in the area.

The trail features a large elevation range and stunning views across Lake Burbury.

A summary of the proposed development can be found below.

Length	30km (approx.)
TDRS	Blue Square
Style	Adventure Ride/s
Format	Point to Point
Construction accessibility	Average
Built infrastructure	Nil
Estimated average build cost (Lin. M)	\$50.00

A map detailing potential trail development corridors can be found over the page.



8.5.26 Rating Matrix

Criteria	Ranking				
1. Land tenure					
2. Approvals complexity					
3. Construction complexity					
4. Operational complexity					
5. Trail experience					
6. Environmental experience					
7. Proximity to towns					
8. Connectivity to existing trails					
9. Broad riding audience					
10. Local recreational appeal					
Total Score	30				

8.5.27 Analysis of Criteria Scoring

8.5.27.1 Land Tenure

The land tenure where the trail is proposed is predominantly crown land, managed by the PWS. This land tenure provides a single management authority and statutory approvals process. A score of four rather than five represents the need to pass through areas of mining lease, in some cases adjacent to the Mount Lyell Mine.

8.5.27.2 Approvals Complexity

The proposed development area resides within a reserve at the lower classification for conservation values with PWS reserves. The scoring for approvals complexity relates to the requirement to negotiate development within areas held under mining leases.

8.5.27.3 Construction Complexity

Construction complexity across the site is variable, though generally good. The reduced scoring for this criterion relates to the risk associated remote trail sections, and areas of rock terrain at higher elevations.

8.5.27.4 Trail Experience

The general trail experience is a back-country trail ride with a meaningful climb and descent. The trail format and experience will be popular with riders.

8.5.27.5 Environmental Experience

The proposed trail offers stunning views across Lake Burbury, with big open vistas across surrounding mountains.

8.5.27.6 Proximity to Towns

The proposed trail development is proximal to the very small community of Linda, though is located some distance from Queenstown.

8.5.27.7 Connectivity to Existing Trails

The proposed new trail development has limited connectivity with existing trails, though could potentially form a new trail hub in Linda.

8.5.27.8 Broad Rider Audience

The trail development will cater to a relatively broad audience of riders, with a focus on intermediate to advanced riders. The trail is not beginner friendly.

8.5.27.9 Local Recreational Appeal

The proposed trail has some local recreational appeal, as a day trip riding experience.

8.5.28 Queenstown to Strahan

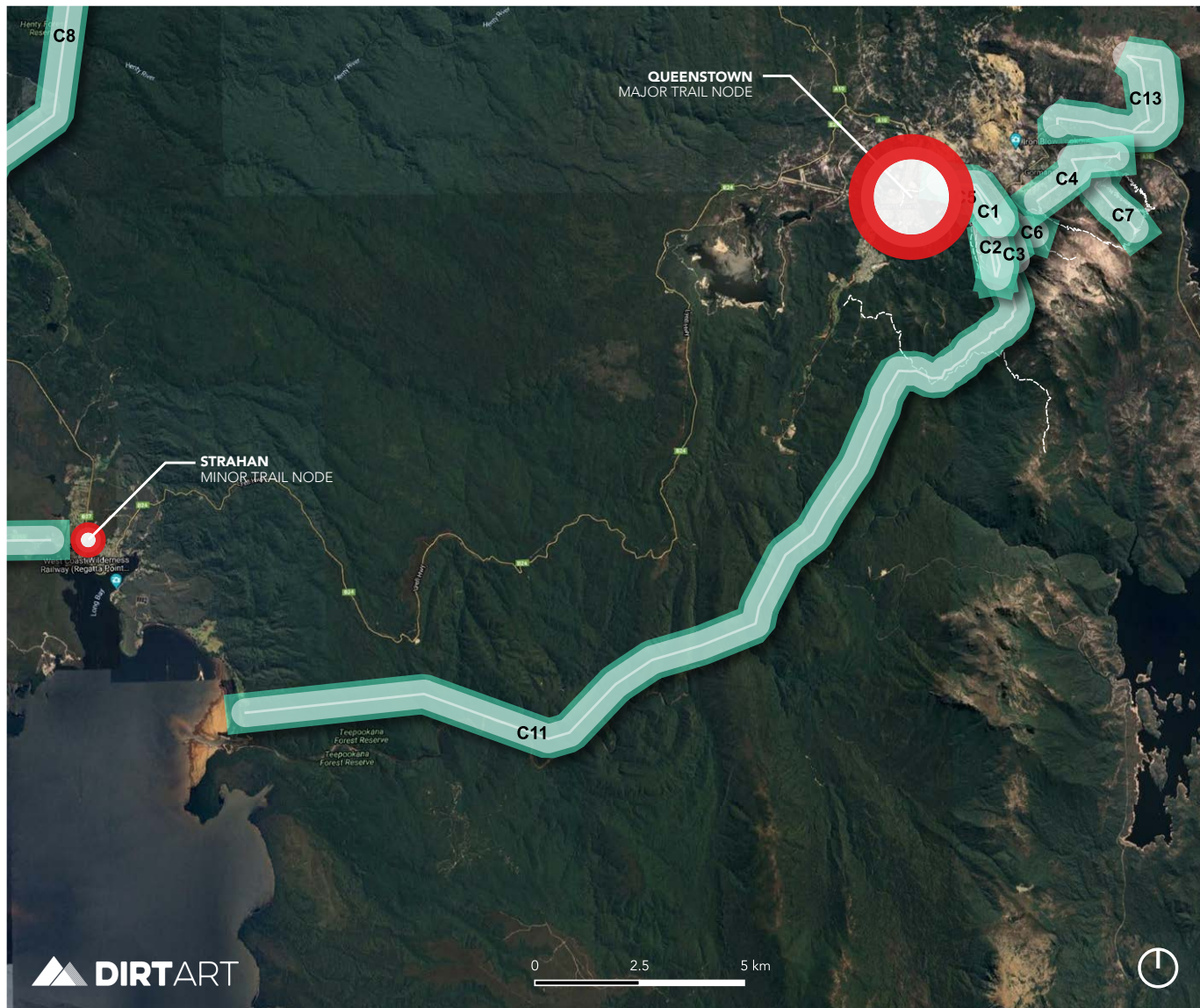
This is a highly aspirational trail, with a very high development cost and complexity. Despite this, there is potential to create a trail of genuine significance for the region. *Dirt Art* investigated two primary routes: a route shadowing the railway line, and a route heading south east over the foothills of Mount Huxley, through to Lake Burbury and on through Tepookana. Ultimately the route adjacent to the railway appear the most feasible, due in large part to overall distance- at potentially 70km+ in length, the Mount Huxley route will exceed the capacity of most riders.

The route is highly complex with steep slopes, dense vegetation and extremely remote areas. As such, construction costs and the complexity and cost of ongoing maintenance will be very high.

A summary of the proposed development can be found below.

Length	30km (approx.)
TDRS	Blue Square
Style	Adventure Ride/s
Format	Point to Point
Construction accessibility	Average
Built infrastructure	Nil
Estimated average build cost (Lin. M)	\$250.00

A map detailing potential trail development corridors can be found over the page.



8.5.29 Rating Matrix

Criteria	Ranking				
1. Land tenure					
2. Approvals complexity					
3. Construction complexity					
4. Operational complexity					
5. Trail experience					
6. Environmental experience					
7. Proximity to towns					
8. Connectivity to existing trails					
9. Broad riding audience					
10. Local recreational appeal					
Total Score	27				

8.5.30 Analysis of Criteria Scoring

8.5.30.1 Land Tenure

The land tenure where the trail is proposed is predominantly crown land, managed by the PWS. This land tenure provides a single management authority and statutory approvals process.

8.5.30.2 Approvals Complexity

The proposed development area resides within a reserve at the lower classification for conservation values with PWS reserves. Approvals for this trail may be affected by railway infrastructure and related considerations.

8.5.30.3 Construction Complexity

Construction complexity across the site is generally considered extremely difficult. Dense vegetation, extreme slopes, and remote access combine to create what would be arguably one of the most complex trails ever constructed in Australia.

8.5.30.4 Trail Experience

The general trail experience is a back-country trail ride with a meaningful climb and descent. The trail format and experience will be popular with riders.

8.5.30.5 Environmental Experience

This is a true back country ride, offering remote rivers, wild forests and a truly remote experience. The environmental and natural value of the trail is arguably the strongest of all potential trails explored in this report.

8.5.30.6 Proximity to Towns

The proposed trail development integrates directly with the townships of Queenstown and Strahan. This format allows riders to refuel and potential stay overnight in either/both towns, providing a significant opportunity for local business.

8.5.30.7 Connectivity to Existing Trails

The proposed new trail development directly connects to the new Mount Owen trail network. Beyond utilising for the start of the ride from Queenstown, this is proposed as a stand-alone trail experience.

8.5.30.8 Broad Rider Audience

The remoteness and challenging nature of the trail will limit the experience to more experienced riders, with capability for genuine back country riding. This trail is not suitable to beginners and less experienced riders.

8.5.30.9 Local Recreational Appeal

The trail has limited appeal for local recreation.

8.5.31 Rosebery to Queenstown

Rosebery to Queenstown is a potentially iconic back country ride, though the route is limited in viability largely due to distance. With significant elevation range and geographical distance to account for, the trail is likely to exceed 85km, placing it out of the capacity of most riders.

The trail route also has potential conflicts with high conservation value areas, mining leases, and the route of the proposed Iconic Walk.

Dirt Art suggest that there is future potential for this concept, but it isn't a priority in the current destination market.

9 Implementation Plan

9.1 Project Staging

The multi factor analysis has provided a ranking of development priorities, this ranking can be found below:

TRAIL CONCEPT	FORMAT	APPROX. LENGTH	MATRIX SCORE	DEVELOPMENT PRIORITY
Mount Owen	Multiple Trails	25km	44	1
Rosebery Trail Zone	Multiple Trails	15km	41	2
Trial Harbour Loop	Loop	25km	40	3
Granville Harbour to Zeehan Trail	Point to Point	25km	38	4
Tullah to Rosebery Trail	Point to Point	30km	38	5
Rosebery to Zeehan Trail	Point to Point	40km	34	6
Zeehan to Strahan Trail	Point to Point	50km	32	7
Mount Lyell	Point to Point	30km	30	8
Queenstown to Strahan	Point to Point	30km	27	9
Rosebery to Queenstown	Point to Point	85km	N/A	10

The prioritisation of trails can be adjusted further to suit local considerations, funding opportunities and other factors.

9.2 Concept Trail Design

The trail concepts presented in this report are broad corridors only, and do not represent concept trail designs. The next step in the design process will be to develop concept plans for these trails which will place the trails into development corridors of approximately 100m. The concept design phase will include further works with statutory organisations and discussions with mining lease holders where relevant.

The concept design process should include careful consideration of natural, cultural and social values.

9.3 Detailed Trail Design

Once concept design has been finalised, the next phase in the project is detailed trail design. Notably, the concept and detailed design stages may be combined into one development phase, which will streamline the process and potentially reduce costs.

Detailed trail design involves extensive field analysis to determine final trail alignments. Depending on the complexity of the area, these alignments will typically represent a development corridor of 20-50m, which will be flagged with survey tape in the field.

The detailed trail design process will consider natural and cultural values, avoiding disturbance of high-value areas.

9.4 Approvals

9.4.1 Parks and Wildlife Service (Reserve Activity Assessment) RAA

All trails in the proposed development reside on PWS-managed land, and as such a Reserve Activity Assessment (RAA) will be required. The specific level of assessment required will be determined by the agency, though given the disturbed, unvegetated landscapes involved, *Dirt Art* would not anticipate a complex RAA will be required.

The RAA process has no statutory approvals timelines, and as such an approvals timeline will be dependent on the prioritisation of the project within the PWS.

9.4.2 Sustainable Timber Tasmania (STT)

Some areas of proposed trail will likely occur within land managed by STT. Depending on the trail and areas, these trails may require a forest practices plan (FPP), and other approval considerations with the agency. Should an FPP be required, *Dirt Art* suggest working with a consultant who has prepared these plans specifically for mountain bike development. The FPP process is designed for forestry activity, and its interpretation in trail development can be complex.

9.4.3 Development Application

Given the nature, scale and location of the project and proposed works that compose it, a development application (DA) will be required.

9.4.4 Geotechnical Assessment

Depending on the final alignments, some trail areas may require geotechnical assessment.

9.4.5 Water Catchment Considerations

Where possible, trail concepts and detailed designs should avoid water catchments. Where not possible to avoid these areas, extensive consultation with Taswater will be required.

9.4.6 Mining Leases

The proposed development areas have a number of active and prospective mining leases. Where possible, *Dirt Art* has avoided proposing trail in mining leases, though pending finalisation of concept alignments during the next project stage, proposing development in these areas will not likely be totally avoidable. The final determination regarding trail development in mining lease areas will require discussion with Mining and Minerals Tasmania and the lease holder.

9.5 Construction Approach

9.5.1 Machine construction where possible

Most modern mountain bike trail construction is undertaken with mini excavators in the size range of 0.8 to two tonnes. The use of excavators offers significant improvements in efficiency relative to hand-building in most environments.

There are some areas, particularly at higher elevations within the proposed development area on Mount Agnew, where it may not be safe or practical to operate machinery. It is considered that establishing trail in these areas will yield experiences of such high quality that the additional cost of hand-building is warranted.

It is recommended that where possible machine construction is pursued, where this does not adversely impact the experience provided by a trail and where it does not substantially impact the character of the development.

9.5.2 Hand building in rugged areas

The steep slopes, uncertain soil depths and lack of anchor points to secure machinery in some areas will require hand-construction of some trails or sections of trails.

9.5.3 Climatic considerations

The occurrence heavy rainfall, strong winds, low temperatures and low visibility that can be expected, particularly during winter months. These conditions will result in days and potentially months where construction is not safe or practical, particularly at higher elevations.

It is recommended that construction of the proposed trails is scheduled for drier, warmer months and that days where it is still not safe or practical to undertake construction during these periods is anticipated in construction scheduling.

It may be possible to undertake construction at lower elevations during winter months.

9.6 Marketing

9.6.1 Overview

In an increasingly competitive destination mountain biking marketplace, an effective marketing strategy and implementation are critical to the success of a mountain bike destination. Marketing should focus on developing high quality video and photo content, which showcases the unique landscapes and experiences offered by the project. In the case of this project, content should focus on dramatic view sheds and the rugged and iconic terrain that typifies the West Coast region; button grass plains; a focus that is also consistent with the Tasmania brand. Marketing should embrace the local climate and weather, showcasing the trails being enjoyed in a range of weather conditions.

9.6.2 Integration with recent West Coast re-branding

The proposed trail development and the experiences it will provide align completely with the recent award-winning rebranding of the West Coast facilitated by Council and delivered by *For the People*.

The campaign leverages the rugged and wild, natural and cultural landscapes of the area, as well as the stories that have evolved through many years of exploration, industry and experiences. It is recommended that branding of the mountain bike trails is consistent with and even potentially captured within the existing branding due to the extent of the synergies between the proposed trail experiences and the West Coast brand.

9.6.3 Marketing opportunities

Several marketing opportunities are available, noting that a combination of opportunities will likely form the basis of a successful marketing plan for the project. Marketing efforts should focus on;

- Creation of high-quality photo and video content, including construction content
- Social media page for the regional experience
- Social media advertising campaigns
- Influencer visits
- Magazine and media pieces (including video destination showcases)

Given the enthusiast (intermediate-advanced riders) focus, traditional media avenues (such as newspaper and television) are unlikely to be an effective marketing avenue for the project.

9.6.4 Website

A web site showcasing the range of West Coast mountain bike opportunities is currently under development.

9.6.5 Marketing budget

Dirt Art suggest a year one marketing budget of 2.5% of capital investment (\$25k/\$1m investment).

9.7 Suggested Development Budget

Given the high level of current trail concepts, it is not possible to develop accurate development budgets. *Dirt Art* has assigned an estimated average linear metre construction rate for all key trail corridors proposed.

10 Operational Considerations

10.1 Management Models

The majority of land proposed for trail development is managed by the Crown Land Services/ the PWS, although notably, the PWS is unlikely to be the ultimate proponent or beneficiary should the trail developments proceed.

Generally, in Australia where large-scale trail development is undertaken, the proponent is a local council, who has an access or lease agreement to utilise the land of parks agencies to develop and operate the trail network.

Dirt Art suggest that the resulting trails should be managed by a single entity, ensuring consistency and cohesiveness in management, and clear avenues for funding and implementation. For the West Coast MTB Project, this entity will most likely be the West Coast Council.

In most cases an access license agreement would be held for the trail corridors only, typically consisting of a 20m corridor to allow for minor trail alignment changes if required.

10.2 Trail Maintenance

Trail maintenance is one of the key operational considerations of any trail destination. In general terms, a high-quality mountain bike destination will require regular maintenance, to ensure trails are maintained to a standard expected by the traveling mountain bike rider. The West Coast project is somewhat unique, with the following key factors relevant;

- The remote and backcountry nature of the trails will result in a lower expectation for a groomed/highly manicured trail surface
- Soils and geology will not allow for a groomed/highly manicured trail surface during construction
- Developing intermediate to advanced trails will reduce the maintenance inputs required to maintain the intended Trail Difficulty Ratings
- A rugged, natural trail surface will be part of the appeal of the West Coast mountain bike products.

Dirt Art suggest that volunteer trail maintenance is not usually a viable approach, particularly, as is the case for the West Coast, where there is not a significant local riding community. Most successful mountain bike destinations, including *Blue Derby* and *Maydena Bike Park* rely on paid, professional maintenance teams. It is recommended that this capacity is developed within Council as the proponent of the trail development.

Dirt Art suggests a maintenance budget of approximately \$2,000.00 per kilometer per annum would be appropriate. Note that this maintenance budget is higher than the typical

suggest budget of \$1,500 due to the remote nature of many of the proposed trails, and the local climate.

10.3 Risk and Incident Management

Risk and incident management is a critically important consideration for any mountain bike trail development and should be considered continually throughout the development and construction process. Given the remote nature of many of the trails proposed, a well-considered risk and emergency management plan will be essential for this project.

First and foremost, most the environments proposed for development in this project are not conducive for beginner riders, with harsh and rugged terrain, extreme side slopes and little to no vegetation buffers.

Incidents can be minimised through the following key considerations;

- Predictability in trails
- Low consequence trail features (limited gap jumps, blind drops etc.)
- Appropriate trail difficulty grading
- Appropriate signage
- High-quality trail design and construction

Incidents can be managed through the following key considerations;

- Liaison with emergency services
- Noting of key access routes
- Noting of emergency points on all trails
- Consideration of aerial rescue points

Emergency management services will be consulted with during the next phase of the project.

10.4 Bushfire Risk and Management

The landscape in which the trail network is proposed is notably fire prone. Large fires occurred in the area in 2019.

During operation, high risk fire days may restrict access to the trail network. The threshold for fire risk closure will be considered during the next stage of the project.

11 Economic Impact Analysis

11.1 Overview

At the current project stage, it is difficult to quantify visitation and economic impacts due to uncertainties around staging and potential implementation strategies. For the purposes of this report, *Dirt Art* has based economic impacts on a staged implementation of 50km of trail per stage. In the current destination mountain bike market, this staging ensures that there is enough trail volume developed each stage to have an impact on visitor attention. The 50km staging will also ensure that there is a volume of trail each stage that is a strong motivator for multi-day stays.

11.2 Projected Visitation

Dirt Art has estimated visitation based on 50km project staging, with visitation estimated for a singular ~50km development stage. Notably, some development stages are likely to attract stronger visitation due to their location and trail style, while other stages may attract a more niche market, though are important for regional dispersal. The estimated visitation below attempts to average visitation across the various different trail styles and locations.

Other considerations include economies of scale, and eventual diminishing returns for some sections of the project. It is likely that visitation will see exponential growth through early development stages, though as later stages are implemented, there is likely to be some easing in visitation growth.

Dirt Art suggest that the project will attract additional visitation of 25,000 rider days per annum, for each 50km of trail developed. Importantly, the vast majority of these riders are expected to engage in multi-day stays, with average anticipated stay in the region of 4 days. Length of stay is likely to grow by two days for each development stage. The anticipated breakdown of these visitors can be found below;

Intrastate- 25%

Interstate- 60%

International- 15% (post COVID-19 border restrictions)

Day visitors are expected to make up a very small portion of visitation, at an estimated 10% of visitors. These visitors are likely to be regional and local riders, living within 1-2 hours of the trail network. This low portion of visitation represents the small local rider market and is based on an expectation that riders outside of the local region will stay at least one night in account of the long travel time to the trails.

11.3 Estimated Economic Impact

11.3.1 Assumptions

For the purposes of this analysis, the following assumptions have been made;

- Visitor breakdown has been estimated as above
- Visitation has been estimated as above
- Average daily visitor spend has been estimated at \$249/night¹
- Average day visitor spend has been estimated at \$50

11.3.2 Direct Economic Impact

The below represents estimated direct visitor spend.

Visitor Type	Volume (p.a.)	Daily Spend	Total
Day Visitor	2,500	\$50.00	\$125,000.00
Overnight Visitor	22,500	\$249.00	\$5,602,500.00

11.3.3 Indirect Economic Impact

The below represents direct and indirect economic impact as a combined value. Indirect economic impact has been estimated using a 1.9x multiplier, which is a commonly accepted multiplier for tourism activity.

Visitor Type	Volume (p.a.)	Daily Spend	Total
Day Visitor	2,500	\$95.00	\$237,500.00
Overnight Visitor	22,500	\$473.10	\$10,644,750.00

¹ TVS Visitor Survey Snapshot YE December 2020

12 Conclusion

The West Coast back country/point-to-point trail mountain bike project offers an exciting opportunity to build upon the current and emerging suite of world-class trail experiences on the West Coast. Developments such as Mount Owen and the soon to be commenced trail network in the Heemskirk Range are creating a strong national and international interest in the area for mountain bike riding.

This project has analysed the potential to create town-to-town connectivity, as well as consolidating further trail and new trail experiences in nodes of development. These development nodes create a greater length of stay in towns, ultimately driving stronger economic benefits. The creation of nodes also simplifies the experience for visitors, which can plan longer stays and less frequent movement between destinations.

The suite of trail experiences proposed offers a genuine opportunity to develop the West Coast region as one of Australia's leading mountain bike destinations. The development proposed offer unique, 'bucket list' experiences that cater for a broad market of riders. The establishment of Australia's first purpose-built overnight bike packing opportunities will attract strong interest from a market of riders that is emerging but growing in the Australian mountain bike industry.

Dirt Art firmly believes that the proposed concepts will continue to shine the light on the West Coast region on the national and international stage as a leading mountain bike destination.

13 Appendix 1 – Mountain Bike Market Overview

13.1 The Mountain Bike Market - National and Local

13.1.1 Overview

The following market profile draws upon research and anecdotal observations from a range of sources. The information draws heavily upon the Australian Mountain Bike Market Profile Survey, undertaken by *Dirt Art* in 2014, 2016 and 2018.

13.1.2 History

Mountain biking has been well established in Australia since the early 90's, though the sport really began to prosper in the mid-late 90's, which saw a period of some of the first purpose-built mountain bike infrastructure in Australia. In 2004 some of Australia's first large-scale mountain bike parks were developed, namely Glenorchy Mountain Bike Park in Tasmania and Mount Stromlo in Canberra. Prior to these developments, mountain biking was taking place largely on existing walking trails and on informal trails created by the riders themselves.

Between 2005 and present day there have been significant advances in mountain bike technology, which is contributing to defining the type of riding experience achievable for and desired by riders. While some trends in riding have come and gone, the disciplines of downhill and cross-country have remained albeit with some blurring between these styles of riding with the emergence of the all-mountain bicycle.

13.1.3 Current market

The current mountain bike market is dominated by longer travel, dual suspension mountain bikes, broadly referred to as all-mountain, trail, or enduro bicycles. This style of bike is incredibly capable at both climbing and descending and has effectively increased the capability of the average rider.

Currently riders are seeking a broad range of experiences from local urban and peri-urban trails through to remote wilderness style longer distance riding experiences. Generally speaking, the mountain bike tourist market is seeking these destinations, adventure experiences in more remote natural environments, involving longer distance loops or point-to-point trails. Trails proximate to urban areas are typically most popular with local riders because of their accessibility and convenience, though may be ridden by visitors drawn to an area for other experiences.

Research indicates that the current demographic of riders is predominately male, with an age of 25-45 years and a high disposable income.² This market is a key target for tourism as they are seeking longer, destination-based' stays and typically seek out high quality dining and accommodation options.

13.1.4 Current participation and economic data - Australia

Current participation data for mountain biking in Australia is distinctly lacking due, in the main, to the nature of the activity itself. However, as new commercial venues emerge more data is becoming available. Traditionally the recording of trail usage numbers has been a relatively rare practice, though in a current climate often characterised by particularly frugal government and corporate investment, this practice is increasingly being used to justify investment in trails. Sample data from some of Australia's key mountain bike destinations can be found below;

Maydena Bike Park (Tasmania) Maydena Bike Park is Australia's largest gravity-focused bike park, with 80km of trails suiting a predominantly enduro market. The park has hosted 30,000 uplift days in 2020, and brought an estimate total 40,000 visitors to the town per annum. With a broadening focus towards trail-based riding and beginner friendly trails, visitation at the park is likely to increase significantly through later years.

Blue Derby (Tasmania) Blue Derby is Australia's highest profile mountain bike trail destination, with a focus on intermediate trail riding, and an assortment of up-lift opportunities. Derby has been in operation for close to 5 years, and reportedly hosted over 30,000 riders in 2018. While Blue Derby have not released visitation data since 2018, it is anticipated that current annual visitation exceeds 45,000 riders. The town of Derby is seeing an ongoing transformation, with several new businesses opening across tour, retail and food and beverage sectors opened since the trails launched.

Mount Buller (Victoria) have invested over \$2m over a four-year period in developing predominantly all-mountain and cross-country mountain bike trails. Data for the resort (as of June 2014) recorded a total rider count of 40,000 – 50,000 visitors over a nine-month period.³ At the time of this report, Mount Buller are set to embark on a major \$2m enhancement of their trail network, with an aim to reinvigorate the destination and increase visitation.

You Yangs (Victoria) have recorded rider numbers of approximately 150,000 per annum in 2011, though a higher true count is expected due to the various entry points used for the park.⁴

13.1.5 Current Participation and economic data - Southern Hemisphere

² Koepke, J. (2005) Exploring the Market Potential for Yukon Mountain Bike Tourism, Cycling Association of Yukon, Canada, page 5.

³ September to May, private communication

⁴ Data provided by Parks Victoria staff July 2011.

Internationally, New Zealand is Australia's closest competitor in the mountain bike tourism market. While New Zealand offers a significant volume of trails, not all trails are necessarily of a world-class standard, often involving poorly constructed volunteer-built trails, fire trails and access roads to add volume to trail distances. Examples of participation in an international context can be seen below;

Rotorua (North Island) is perhaps New Zealand's most recognised and loved mountain bike destination. The 170km+ trail network is regarded around the world for its fast, flowing trails through a working pine forest. Research by APR consulting found that approximately 33% of visitors to the forest in 2007 were Australian.⁵ It was recently reported that mountain bike activity in Rotorua is generating \$10.2m per annum, as opposed to the \$4.6m (one time) in export revenue potentially generated by logging the forest.⁶

In 2019, over 250,000 riders visited the Redwoods Trail Network at Rotorua⁷.

Queenstown (South Island) is one of the Southern Hemisphere's leading mountain bike destinations. Queenstown has a gravity-based bike park (Skyline Queenstown), along with a number of other regional cross country and all mountain trails. The region is renowned for its iconic long-format descending trails, such as Rude Rock, Corrotown and Skippers Canyon.

A 2017 report by *TRC Tourism* found that mountain biking contributed over \$25m per year to the local economy⁸.

13.1.6 Current participation and economic data - Northern Hemisphere

Whistler Mountain Bike Park (Canada) is arguably the world's most recognised mountain bike park, offering one of the highest volumes of trail in one venue anywhere in the world. The Whistler Bike Park received approximately 200,000 riders per year (through its green season), but it is estimated that a similar volume of users rides the surrounding valley trail network annually.

A 2016 report commissioned by the Whistler Off Road Cycling Association (WORCA) found that mountain biking contributed over \$79m p.a. to the regional economy of British Columbia. The report also found that over 500,000 individual rides were undertaken in the region in 2016.⁹

Park City, Utah (United States of America) offers hundreds of miles of single trail across a number of riding areas. All riding styles are catered for across public trails, and commercial

⁵ Recreational Use and Economic Impact of Whakarewarewa Forest (2009 Update), APR Consultants

⁶ The New Zealand Herald January 17th 2012, Bikes bring more money than wood from Rotorua forest

⁷ Information supplied by Rotorua Trails Trust

⁸ Queenstown Trails Economic Impact Survey, February 2017, TRC Tourism

⁹ CSTA Economic Impact of Mountain Biking 2016

gravity-based bike parks. This IMBA Gold level mountain bike destination received over 1m visits in 2014.

Oregon (United States of America) has a significant cycle tourism industry. Cycle tourism (predominantly mountain biking) was worth over \$400m to the state in 2013, with cycle tourists spending on average 20% more than general tourists.¹⁰

13.1.7 The future

13.1.7.1 General

The sport of mountain biking has continued to see sustained and exponential growth both in Australia and overseas. With current demand for high-quality riding opportunities still far exceeding supply, there exists significant potential to see excellent return on investment when developing world-class mountain bike trails and facilities.

Dirt Art suggest that the all–mountain category of riding will continue to grow, resulting in an increasing demand for more challenging, descending-focused riding. *Dirt Art* suggests that the next five years will see a huge increase in demand for chairlift or shuttle accessed descending cross–country and all–mountain trail experiences. Many of the major recent and underway mountain biking trail developments focus on these experiences (e.g. Mt Buller Epic, Hollybank Juggernaut, Blue Tier, Derby’s Black Stump Shuttle Trails, Thredbo AM Descent and Valley Trail) which are reflective of the increasing demand for this style of descending cross–country / all–mountain trail.

13.1.7.2 E-bikes

While traditional bike technology is likely to continue to stabilise, the rapid emergence of the E-bike is likely to have a significant impact on the sport. In *Dirt Art’s* view, E-bikes will never completely replace the traditional mountain bike, but as technology improves the bikes will become a much more common feature on the trails. E-bikes make the sport more accessible to newer and less-capable riders and increase the ride duration and the accessible elevation range for more experienced riders.

It is important to recognise the distinction in E-bikes between high-powered throttle assisted bikes and lower-powered pedal-assisted bikes. Pedal assisted bikes have no additional impacts on trails, whereas throttle powered bikes are illegal in most public areas and will cause significant additional damage to trails.

E-bikes will be well-suited to the proposed trail concepts, with this style of bike suiting the target audience of the trail network. E-bikes will also provide an opportunity for riders to ride multiple descending trails and explore further in the loop trail network than they may be able to on a traditional mountain bike.

¹⁰ Information provided by Destination Oregon.

13.2 Mountain bike tourism

13.2.1 Mountain bike tourism markets

Tourists engaging in mountain biking can be divided into two distinct categories, the 'complementary market'; those who engage in mountain biking as a complementary activity (not as a primary motivator or sole purpose for travel), and the 'enthusiast market' those who have travelled with mountain biking being the primary or sole reason for their trip.

13.2.2 Complementary mountain bike tourism markets

Mountain bike riding as a complementary activity has risen dramatically in popularity in recent years, as the sport has moved beyond the 'extreme sport' image of the past, and more towards the accurate perception of the sport as a safe, inclusive and fun 'adventure' activity.

Complementary visitation is a key component of a successful government-backed mountain bike destination as it allows the capture of a much larger target audience, and promotes longer stays, and increased travel party size. Complementary tourists include valuable family markets, who will often stay longer and spend more than solo and small group tourists.

The emergence of mountain biking as a commercially viable complementary activity has been driven largely through the development of safer, more beginner-friendly trails, and by the growing number of commercial operators including the sport in their activity programs. Commercial viability of mountain biking as a complementary activity requires a lower volume of trail than for the enthusiast market, though the required quality and maintenance demand of trails will be higher. As a complementary activity, mountain biking offers genuine avenues for commercial return, while also potentially lengthening the duration of stay for existing guests. In addition to this, targeted marketing may draw in guests that may otherwise have travelled to an alternative location.

Successfully targeting the complementary tourism market involves careful consideration and delivery against the following key areas;

- High-quality beginner-friendly trails
 - A structured progression in difficulty through trail types
 - A good volume of smoother flow style trails
 - Access to high-quality hire bikes
 - Comprehensive and easily interpreted trail signage
 - Access to a variety of formal and informal non-riding activities
- Access to a good range of accommodation and food and beverage opportunities.

13.2.3 Enthusiast tourist market

The enthusiast market is defined as mountain bike tourists for whom mountain biking is the primary motivator/purpose for their travel. The enthusiast market seeks out new and exciting mountain bike destinations, and typically travel multiple times annually to engage in mountain biking.

The mountain bike enthusiast market is typically populated by 25-45-year-old individuals (84% male; 16% female) with a high disposable income, who are seeking opportunities to travel to destinations with the primary purpose of going mountain bike riding.

While mountain bike riding may be the primary travel motivator, the availability of alternative activities will still influence this traveller as they will often look for destinations where they can viably travel with family, their spouse or non-enthusiast travelling companion/s.

The mountain bike enthusiast is typically travelling for multi-day stays and is seeking unique and high-quality trail experiences. These users will typically seek higher volumes of trail, as they will often ride 30-40km+ per day.

Successfully targeting the enthusiast tourism market involves careful consideration and delivery against the following key areas:

- High quality trails
- Unique and iconic environments
- Iconic signature trail experiences
- High volumes of trails
- A good supply of intermediate to advanced trails

13.3 Defining Mountain Bike Destinations

13.3.1 Overview

Mountain biking has been driving visitation into small regional areas for several years now, though the focus on mountain biking as an effective driver of tourism and economic development is relatively new. Destinations such as Blue Derby (Tasmania) have proven that small towns can be reinvigorated with mountain biking spearheading this change.

The hierarchy below has been developed by *Dirt Art* to assist in positioning trail developments to an appropriate audience, providing clarity on funding and operational models for land managers.

Notably, the benchmarks for mountain bike destinations is not a static or quantitative measure and will be affected by regional nuances along with a range of other factors. Also,

of note, with some \$150m+ set to be invested in mountain bike trail development across the next 2-3 years, the benchmarks for trail destinations are likely to increase.

Dirt Art suggest recognition of the following considerations:

- Trail quality will always be more important than trail quantity
- Gravity-based trail networks are a rarer commodity and as such, the benchmarks for these trail destination types is lower (i.e. a lower volume of trails will attract a higher volume of rider visitation)
- Travelling riders have a strong preference for riding in high-quality natural environments
- Elevation opportunities are extremely important, and often provide an insurmountable point-of-difference against other more urban-based trail opportunities

Gravity-based mountain bike destinations will generally feature lower benchmarks, due to scarcity in the market and the rise in popularity of enduro riding. *Dirt Art* suggests that a 25-50% reduction in trail volume benchmarks can be applied to high-quality gravity-focused facilities.

13.3.2 Nationally Significant Destination

The idea of a nationally significant mountain bike destination is relatively new, with the first destinations notionally meeting this benchmark only in the past three years. A nationally significant mountain bike destination generally possesses the following key characteristics:

- 80+km trail volume
- Trails catering for green circle to double black diamond difficulty
- Capacity to host national and/or world-level events
- High-quality, comprehensive trail signage system
- A high-quality entry gateway (quality signage, pump trail etc)
- 400m+ elevation opportunity
- Uplift opportunity
- Very high-quality natural environments
- A local bike store/s
- A minimum of two market-appropriate food outlets within 10 min drive from trails
- Market-appropriate accommodation meeting supply demands during peak season
- A funded formal trail maintenance program that is carried out by staff trained in mountain bike trail construction techniques

13.3.3 State-significant Destination

State-significant trail destinations cater for a more intrastate-focused audience, though notably will generally attract national visitation, particularly when other regional or other high-quality trail opportunities are available nearby. A state-significant mountain bike destination generally possesses the following key characteristics:

- 40+km trail volume
- Capacity to host national or regional level events
- Uplift opportunity
- Trails catering for green circle to black diamond difficulty
- High-quality, comprehensive trail signage system
- 200m+ elevation opportunity
- Good quality natural environments

13.3.4 Regionally Significant Destination

Regionally significant trail destinations cater for a more regionally focused audience, though notably will generally attract national visitation, particularly when other regional or other high-quality trail opportunities are available nearby. A regionally significant mountain bike destination generally possesses the following key characteristics:

- 20+km trail volume
- Capacity to regional level events
- Trails catering for green circle to black diamond difficulty
- High-quality, comprehensive trail signage system
- 100m+ elevation opportunity

13.3.5 Local-Level Destination

A local-level mountain bike destination services a smaller, local market, and will generally hold low appeal for visiting riders. These destinations are generally constructed utilising primarily local volunteer labour. A locally significant mountain bike destination generally possesses the following key characteristics:

- <20km of trails
- Capacity to hold local-level (club) events
- A functional signage system



Mountain Bike Trail Strategy

West Coast, Tasmania

West Coast Council
September 2019

Table of Contents

1	Executive Summary	5
2	Introduction.....	7
2.1	Project Overview	7
2.2	Key Objectives	7
2.3	Methodology	8
2.3.1	Literature Review	8
2.3.2	Field investigation	9
2.3.3	Peer review of recommended strategy	9
3	Background Analysis.....	10
3.1	Overview	10
3.2	Previous Reports.....	12
3.2.1	Dirt Art (2015) <i>Strategic Trail Plan- West Coast, Tasmania</i>	12
3.2.2	Mtn. Trails (2015) <i>West Coast Mountain Bike Project - Queenstown Gravity Trails</i>	13
3.2.3	Trail Systems (2018) <i>West Coast Mountain Biking - A discussion of existing, proposed and potential mountain bike trails on the West Coast of Tasmania.</i>	13
3.2.4	West Coast Council (2018), <i>West Coast Mountain Bike Trails (Review of Strategy, Existing Infrastructure and Planned Infrastructure)</i>	14
4	Mountain Bike Market Profile.....	15
4.1	The Mountain Bike Market - National and Local.....	15
4.1.1	Overview	15
4.1.2	History	15
4.1.3	Current market.....	15
4.1.4	Current participation and economic data- Australia.....	16
4.1.5	Current Participation and economic data - Southern Hemisphere.....	17
4.1.6	Current participation and economic data - Northern Hemisphere.....	17
4.1.7	The future	18
4.2	Mountain bike tourism	19
4.2.1	Mountain bike tourism markets	19
4.2.2	Complementary mountain bike tourism markets.....	19
4.2.3	Enthusiast tourist market.....	20
5	Establishing the West Coast as a mountain bike destination.....	21
5.1	Overview	21
	Characteristics of the West Coast.....	22
5.2.1	Topography	22
5.2.2	Climate	22
5.2.3	Geology	22
5.2.4	Vegetation.....	22
5.2.5	Population and access.....	22
5.2.6	Existing trail infrastructure.....	23
6	Trail Strategy.....	24
6.1	Overview	24
6.1.1	Location Map	24
6.2	Potential development areas for big-mountain trail riding and descents.....	26
6.2.1	Mount Owen	26

6.2.2	Heemskirk Regional Reserve	26
6.2.3	West Coast Range Regional Reserve	26
7	Priority Development Area Detail– Mount Owen	30
7.1	Mount Owen Overview	30
7.2	Land Tenure	30
7.3	Geology and topography	30
7.4	Environmental Values	31
7.5	Existing Infrastructure	31
8	Trail Concepts- Mount Owen	33
8.1	Overview	33
8.2	Trail-head	33
8.2.1	Potential Locations	33
8.2.2	Amenities required	35
8.3	Trail Concept Maps	35
8.4	Trail Concept 1	38
8.5	Trail Concept 2	39
8.6	Trail Concept 3	40
8.7	Trail Concept 4	41
8.8	Trail Concept 5	42
9	Potential Future Concepts	43
9.1	Overview	43
9.2	Future Concepts	43
9.2.1	Heemskirk Regional Reserve and West Coast Regional Reserve	43
9.2.2	Back country trail riding with options for overnight routes	43
9.2.3	Queenstown trail concepts	44
9.2.4	Connection with the Wilderness Railway Trail, King River Rafting or other complimentary tourism products	44
10	Implementation Plan	45
10.1	Detailed trail design	45
10.2	Approvals	45
10.2.1	Parks and Wildlife Service (Reserve Activity Assessment) RAA	45
10.2.2	Development Application	45
10.2.3	Geotechnical Assessment	45
10.2.4	Water Catchment Considerations	45
10.3	Construction Approach	46
10.3.1	Machine construction where possible	46
10.3.2	Hand building at higher elevations	46
10.3.3	Climatic considerations	46
10.4	Marketing	47
10.4.1	Overview	47
10.4.2	Integrates with recent West Coast re-branding	47
10.4.3	Existing mountain bike branding	47
10.4.4	Marketing opportunities	47

10.4.5	Web site	48
10.4.6	Marketing budget	48
10.5	Signage	49
10.5.1	Overview.....	49
10.5.2	Budget	49
10.6	Suggested Development Budget	49
10.6.1	Overview.....	49
11	<i>Operational Considerations.....</i>	50
11.1	Management Models	50
11.2	Trail Maintenance	50
11.3	Risk and Incident Management.....	51
12	<i>Community</i>	52
12.1.1	Business development forums	52
12.1.2	Increasing participation and engagement	52
13	<i>Conclusion.....</i>	53
14	<i>Appendix 1- Proposed Development Budget.....</i>	54
15	<i>Appendix 2- Inspiring Place Peer Review</i>	55
16	<i>Appendix 3 - IMBA TDRS.....</i>	56

1 Executive Summary

The West Coast of Tasmania has a unique landscape that provides a profound opportunity to develop and promote mountain bike experiences, which are able to attract riders from outside the region. The achievement of this objective will rely upon the development of trail experiences that are high-quality, iconic and unique, allowing access to the range of unique environments the area has to offer.

Successfully establishing the West Coast as a mountain bike destination will require the development of a significant volume of purpose-built trails that leverage the West Coast's unique natural setting and heritage. A range of 'big mountain' descents and back-country trail riding experiences will attend to niches in the destination mountain bike market not serviced by any existing domestic mountain bike destinations. Big mountain trail riding traditionally encompasses trail experiences that are 'above the tree line' and feature long format descents. There is an obvious lack in the supply of big mountain experiences in the Australian trail destination marketplace, and little to no scope to develop these trails in other areas due to the environmental sensitivities of developing trails in alpine and sub alpine areas.

The mountains of the West Coast Range and specifically Mount Owen are well suited to the development of unique mountain bike trails that would allow Australian (and visiting international) mountain bike riders access to experiences they must currently travel to North America, South America and Europe to enjoy.

The proximity of Mount Owen to the population centre and amenities of Queenstown, the remarkable environment, extensive views over the South West Wilderness World Heritage area, simplified assessment and approvals attributable to the low natural values and tenure designation make Mount Owen the obvious priority development area within which to develop big-mountain trail experiences. This recommendation is entirely consistent with pursuing 'Potential Epic Rides' and 'Iconic Wild Rides' in the Proposed Hierarchy of Trails presented in the *Tasmanian Mountain Bike Plan: Main Report*. 'Potential Epic Rides' and 'Iconic Wild Rides' are presented as the only mountain bike infrastructure type capable of attracting interstate and international riders to Tasmania.

The climate, geology, exposure and remoteness of the areas of the West Coast best suited to the development of appealing trail experiences makes it difficult for trails to attend to the needs of beginner riders. It is recommended that trails are accessible to the widest range of abilities possible where achieving that end doesn't reduce the quality of the trail experience for the target market segment. It is expected that this will require the development of trails that meet the International Mountain Bike Association Technical Difficulty Rating of Intermediate and above.

Dirt Art suggests that the focus should not be on beginner-intermediate riders, who are generally less inclined to travel with mountain biking as their primary travel motivation and whose needs are more likely to be met by more accessible, generic experiences and

destinations. Notably, this market segment is well catered for by regional Tasmanian trail centres such as *Wild Mersey* and *Blue Derby*.

The distribution of towns throughout the West Coast and the rapid transition from urban to wilderness environments also reflects an opportunity to develop back-country trails that extend from town to town, utilising existing hospitality providers. This negates the need to develop on-trail accommodation, establishes a point of difference between this and the existing and proposed trail experiences across Australia and New Zealand and provides direct opportunities for existing business to service riders.

The 'Independent Mountain Biker', characterised in the *Tasmanian Mountain Bike Plan: Attachments*, is presented as the primary mountain bike market segment for Tasmania. This segment seeks 'adventure, skill and physical challenges in exceptional natural landscapes' is motivated by the 'technical quality of trails' in 'non-crowded, natural destinations' and 'frequently rides difficult or advanced' trails. While this segment is not suggested to be the largest potential market by volume, it aligns well with the opportunities and constraints the West Coast presents.

This report will explore the proposed immediate and longer-term trail development priorities that will provide the most significant tourism and economic benefits for the region.

2 Introduction

2.1 Project Overview

Dirt Art has been engaged by the West Coast Council to develop a mountain bike trail strategy that will guide the trail infrastructure development necessary to establish the West Coast as a viable mountain bike destination that complements existing Tasmanian mountain bike destination offerings.

The strategy seeks to define the types of experiences that both attend to market demands and are feasible to establish within the West Coast context, then identify and prioritise areas best suited to developing the infrastructure that will be the basis of these experiences.

This document builds on and updates the positions developed through previous reports authored by *Dirt Art* and *Trail Systems*.

2.2 Key Objectives

The key objective of this report is to develop a mountain bike strategy for the West Coast of Tasmania that:

- Has a genuine point-of-difference/s and strong market appeal
- Showcases unique West Coast landscapes
- Is environmentally sensitive and sustainable
- Provides cost-effective construction conditions
- Minimises land tenure complexity, and streamlines assessments and statutory approvals
- Maximises direct and indirect economic opportunities and benefits
- Provides maximal community benefit and engagement

2.3 Methodology

The project has engaged the following methodology;

2.3.1 Literature Review

The following reports and plans have been reviewed;

- Dirt Art (2015) *Strategic Trail Plan- West Coast, Tasmania* (Confidential report commissioned by Parks and Wildlife Service, Tasmania - not shared with Council)
- West Coast Council (2018), *West Coast Mountain Bike Trails (Review of Strategy, Existing Infrastructure and Planned Infrastructure)*, public report released by Council.
- West Coast Economic Working Group (October 2014) *Interim Report*
- West Coast Economic Working Group (December 2014) *West Coast Mountain Bike Project*, Department of State Growth, Burnie
- Parks and Wildlife Service, Tasmania (May 2018) *Expression of Interest, Zeehan Hub: Heemskirk Loop trail development*
- Sport and Recreation Tasmania (2009) *Tasmanian Mountain Bike Plan*, Department of Economic Development, Tourism and the Arts, Hobart
- Department of Conservation, New Zealand (2013) *Heaphy Mountain Bike Trial, 2011-2013*
- Tourism Tasmania (2008), *Mountain Bike Tourism Market Profile for Tasmania*, Department of Economic Development, Tourism and the Arts, Hobart
- Mtn. Trails (2015) *West Coast Mountain Bike Project - Queenstown Gravity Trails*
- Trail Systems (2018) *West Coast Mountain Biking - A discussion of existing, proposed and potential mountain bike trails on the West Coast of Tasmania.*

2.3.2 Field investigation

Field investigation of potential development areas was undertaken by *Dirt Art* staff between the 26th of March and 10th of April 2019.

This field investigation builds upon the understanding of the West Coast area developed during the development of earlier reports by *Dirt Art* and *Trail Systems*.

2.3.3 Peer review of recommended strategy

Dirt Art have engaged *Inspiring Place* to undertake a peer review and provide validation of the proposed strategy.

This peer review document can be found at Appendix 2.

3 Background Analysis

3.1 Overview

In 2014, following the Mount Lyell Mine entering care and maintenance and the announcement that Unity Mining would close its Henty mine in late 2015, the Tasmanian Government established the West Coast Economic Working Group (WCEWG) to coordinate Government response to the closure and provide support and stimulus to the West Coast Community.

The WCEWG identified key projects that possessed the potential to diversify the local economy and provide business opportunities, including the development of a network of mountain bike trails.

In October 2014 the Tasmanian Government allocated \$1.21 million dollars to construct and improve a range of mountain bike trails around Zeehan. The WCEWG established the Zeehan mountain bike Steering Group and initiated a two-stage process to establish and promote trails that would drive mountain bike visitation on the West Coast.

Stage One involved 'improvement and enhancement' of existing trails around Zeehan. Stage Two proposed the development of purpose-built mountain bike trails, the location and nature of which to be determined through a consultation process with community and stakeholders.

PWS engaged *Dirt Art* to develop a Draft Strategic Plan that was to guide trail improvements and development through assessment of the submissions made during the consultation process and proposals already generated from within Government. The objective of this plan was to review proposed Stage One works, identifying existing trail infrastructure that with some improvements or maintenance would be suitable for promotion and develop and prioritise conceptual trail plans that would compose Stage Two of the project.

Three development priorities were recommended by the draft Strategic Plan; development of a network of gravity trails on the lower slopes of Mount Owen and linking to Queenstown, establishing a trail in the Mount Heemskirk Regional Reserve that created a loop with an existing trail, and an extension to the existing Sterling Valley descent near Roseberry. The Mining and Minerals Group (MMG) at the time expressed an interest in contributing funding to the Sterling Valley Project, though no financial support eventuated for this project.

Maintenance and improvements, recommended to be undertaken as Stage One of the Project involved; drainage works, minor reroutes of unrideable sections of the Montezuma Falls from Williamsford up to the Falls, installation of signage and a bridge across Granite Creek on the Climies Track from Trial to Granville Harbour, improvement of the North East Dundas tramway from Melba Flats to Zeehan, reroutes of steep sections and mitigation of

extensive wet areas of the Sterling Valley Track, upgrades to the network of trails surrounding the Spray Tunnel near Zeehan and realignment of steep sections and drainage of wet sections of the Heemskirk Track. A key appeal of the Sterling Valley, Montezuma Falls and NE Dundas trails was that they could link the towns of Tullah, Roseberry and Zeehan, which was a key objective of the Stage 1 works. Climies Track was included to capitalise on available funding and replace the granite Creek Bridge, which would address 4WD risk issues, as well as improving mountain bike access- this was the only works completed on this trail.

Trail construction company - *Mtn. Trails*, were engaged to undertake the on-ground design work required to develop the three concepts to a stage where they were able to be constructed.

A Queenstown-based company was engaged to undertake selected Stage One maintenance and improvement works.

The dense vegetation, problematic geology and issues described by the PWS relating to the Department of State Growth's concerns around establishment of a trail head and a parking area at the high-point of the Murchison Highway between Tullah and Roseberry led to the abandonment of this development.

Mtn. Trails undertook design of an adaptation of the concept for a return trail to form a loop using the existing trail that extends from Piney Creek to near Zeehan departing and rejoining Heemskirk Road that was offered in the Strategic Plan.

The PWS then pursued a novel approach where trail building companies were invited to develop a concept within the stated project budget and project area that would reflect an experience of sufficient quality to attract riders to the region. The company responsible for the successful concept would then be invited to undertake detailed design and provide accurate cost estimates.

The existing Heemskirk Track had also been rendered unsuitable for use during works carried out by the Tasmanian Fire Service without consultation, to improve firefighting access. An alternative alignment was developed that maximised the elevation range and views the trail would offer within the constraints the area presented. This deviation from the initial concept triggered abandonment of the process.

Mtn. Trails undertook design of the Queenstown Gravity Trails based on the concept provided in the Draft Strategic Plan with some adaptations required by the highly varied topography and geological conditions the area presents.

In 2018 the PWS provided the West Coast Council with the Field Work Report provided by *Mtn. Trails* post-design an approved Development Application and supporting material required to advance the Queenstown Gravity Trails to construction.

With budget from 2014, \$40k was allocated for marketing for WCC agreed trail promotions. PWS commissioned signs with neutral branding to allow WCC to make the most of the promotional opportunity. PWS collated trail details suited for WCC promotions. A PDF that appears to only be available on the West Coast Council website has also been created that provides some basic information to assist riders in locating the trails, the nature of the trails, some background and historical context and their International Mountain Bike Association Technical Difficulty Rating (TDR). Notably, this PDF has been removed from circulation during the finalisation of this report.

An Expression of Interest process (EOI) was undertaken by the PWS in late 2018 which invited selected 'trail building experts' to develop a draft trail plan for a 'mountain bike journey' that will improve the quality of the mountain bike experience, starting and finishing in a central location in Zeehan that incorporates existing trail infrastructure.

The initial EOI request required draft plans to utilise the existing Heemskirk Track, but in consultation with WCC it was agreed that alternative locations near Zeehan may be more viable.

Tasmanian trail building company; *Next Level MTB* were awarded the tender to construct the concept they proposed. The trail departs Trial Road ascending 2km to the summit of Mount Oonah above Zeehan using purpose-built trail. The trail then descends approximately 3km to Heemskirk Road just north of Zeehan.

This trail is significant in that it is the first purpose-built mountain bike trail to be commissioned on the West Coast however, it's limited scale and location may limit its contribution to establishing the West Coast as a viable mountain bike destination.

In 2018, approximately \$500k was transferred to WCC by the PWS to enable development of the Queenstown Lower Gravity Trails. It is this remaining funding that will be utilised to activate the initial development priorities established in this report. Previously, the crown (through the Tasmanian State Government) agreed to lease approved trail corridors to the WCC to enable development in the Queenstown area. It is anticipated that a similar process will be pursued through this next stage of the project.

3.2 Previous Reports

3.2.1 Dirt Art (2015) *Strategic Trail Plan- West Coast, Tasmania*

Dirt Art was engaged by the Tasmanian Parks and Wildlife Service (PWS) in 2016 to develop a Strategic Plan for the entire West Coast region. This project assessed trail development potential across the region, with the view to establishing a suite of regional experiences that would compose an appealing destination.

The project proposed a focus on developing trails in Zeehan and Queenstown, with key concepts focusing on back-country trail riding and long-format descending trails. A strong emphasis was placed on showcasing the unique West Coast landscape.

The project did not consider development on the upper slopes of Mount Owen in Queenstown due to the tight budget and time constraints the project involved. With the strong potential offered by the site, *Dirt Art* investigated the potential for the upper slopes of the mountain during this project.

3.2.2 Mtn. Trails (2015) *West Coast Mountain Bike Project - Queenstown Gravity Trails*

Mtn Trails, engaged by the West Coast Economic Working Group delivered a series of three fieldwork reports detailing the outcomes of their on-ground design of the three development priorities detailed in *Dirt Art's* Strategic Plan.

These priorities are listed below;

- Heemskirk Cross-Country Loop Extension
- Queenstown Lower Gravity Trails
- Sterling Valley Extension and Descent 2

Only the report describing the Queenstown Gravity Trails was made available to the West Coast Council and was consequently available for detailed review in the development of this report. The remaining two reports have been provided to and considered during previous planning and review work by *Trail Systems* and *Dirt Art*.

The field work described in these reports, as already discussed involved design of literal interpretations of the high-level concepts provided in the *Dirt Art* Strategic Plan.

There has been no development of trails based on the work described in these reports due to a consensus that they were of insufficient quality to achieve the stated objective or in the case of Sterling Valley, feasibility concerns around traffic management at the trail head on the Murchison Highway.

3.2.3 *Trail Systems (2018) West Coast Mountain Biking - A discussion of existing, proposed and potential mountain bike trails on the West Coast of Tasmania.*

Trail Systems were engaged by the West Coast Council to review the Mtn. Trails designs for the Queenstown Gravity Trails, to provide an assessment of the suitability of the existing trails promoted for mountain bike use on the West Coast and to provide a basic strategy to guide future planning and development.

The development of the report involved field investigation of the alignments proposed by *Mtn. Trails* for the Queenstown Gravity Trails on Mount Owen. The report suggests the

quality and type of experience offered by the Queenstown Gravity Trails is not sufficient to create any significant impact on mountain bike visitation on the West Coast.

The report describes how the range of existing trails promoted for mountain bike use generally fail to provide experiences of a high enough standard to attract mountain bikers in the increasingly competitive destination mountain bike market and that any significant effort to market the existing trails alongside other mountain bike offerings in Tasmania will serve to undermine the market position of Tasmania as a credible mountain bike destination.

3.2.4 West Coast Council (2018), *West Coast Mountain Bike Trails (Review of Strategy, Existing Infrastructure and Planned Infrastructure)*

Following *West Coast Council* receiving the *Trail Systems* report described above, the Council developed a document that summarised the current state of mountain bike infrastructure supply, existing proposals and plans for new infrastructure and the opportunities that exist for the West Coast to provide competitive mountain bike experiences.

The report contains a table of recommendations that address the issues and opportunities associated with the approach to mountain bike tourism experiences and infrastructure supply on the West Coast.

The report was presented to Council and the Community in an open public session with all recommendations approved by Council.

4 Mountain Bike Market Profile

4.1 The Mountain Bike Market - National and Local

4.1.1 Overview

The following market profile draws upon research and anecdotal observations from a range of sources. The information draws heavily upon the Australian Mountain Bike Market Profile Survey, undertaken by *Dirt Art* in 2014, 2016 and 2018.

4.1.2 History

Mountain biking has been well established in Australia since the early 90's, though the sport really began to prosper in the mid-late 90's, which saw a period of some of the first purpose-built mountain bike infrastructure in Australia. In 2004 some of Australia's first large-scale mountain bike parks were developed, namely Glenorchy Mountain Bike Park in Tasmania and Mount Stromlo in Canberra. Prior to these developments, mountain biking was taking place largely on existing walking trails and on informal trails created by the riders themselves.

Between 2005 and present day there have been significant advances in mountain bike technology, which is contributing to defining the type of riding experience achievable for and desired by riders. While some trends in riding have come and gone, the disciplines of downhill and cross-country have remained albeit with some blurring between these styles of riding with the emergence of the all-mountain bicycle.

4.1.3 Current market

The current mountain bike market is dominated by longer travel, dual suspension mountain bikes, broadly referred to as all-mountain, trail, or enduro bicycles. This style of bike is incredibly capable at both climbing and descending and has effectively increased the capability of the average rider.

Currently riders are seeking a broad range of experiences from local urban and peri-urban trails through to remote wilderness style longer distance riding experiences. Generally speaking, the mountain bike tourist market is seeking these destinations, adventure experiences in more remote natural environments, involving longer distance loops or point-to-point trails. Trails proximate to urban areas are typically most popular with local riders because of their accessibility and convenience, though may be ridden by visitors drawn to an area for other experiences.

Research indicates that the current demographic of riders is predominately male, with an age of 25-45 years and a high disposable income.¹ This market is a key target for tourism as they are seeking longer, destination-based' stays and typically seek out high quality dining and accommodation options.

4.1.4 Current participation and economic data- Australia

Current participation data for mountain biking in Australia is distinctly lacking due, in the main, to the nature of the activity itself. However, as new commercial venues emerge more data is becoming available. Traditionally the recording of trail usage numbers has been a relatively rare practice, though in a current climate often characterised by particularly frugal government and corporate investment this practice is increasing being used to justify investment in trails. Sample data from some of Australia's key mountain bike destinations can be found below;

Maydena Bike Park (Tasmania) Maydena Bike Park is Australia's largest gravity-focused bike park, with 80km of trails suiting a predominantly enduro market. The park has hosted 25,000 uplift days and brought an estimate total 35,000 visitors to the town in its first year of operation. With a broadening focus towards trail-based riding and beginner friendly trails, visitation at the park is likely to increase significantly through later years.

Blue Derby (Tasmania) Blue Derby is Australia's highest profile mountain bike trail destination, with a focus on intermediate trail riding with limited up-lift opportunities. Derby has been in operation for close to 5 years, and reportedly hosted over 30,000 riders in 2018. The town is seeing a dramatic transformation, with several new business opening across tour, retail and food and beverage sectors.

Mount Buller (Victoria) have invested over \$2m over a four-year period in developing predominantly all-mountain and cross-country mountain bike trails. Data for the resort (as of June 2014) recorded a total rider count of 40,000 – 50,000 visitors over a nine-month period.²

You Yangs (Victoria) have recorded rider numbers of approximately 150,000 per annum in 2011, though a higher true count is expected due to the various entry points used for the park.³

¹ Koepke, J. (2005) Exploring the Market Potential for Yukon Mountain Bike Tourism, Cycling Association of Yukon, Canada, page 5.

² September to May, private communication

³ Data provided by Parks Victoria staff July 2011.

4.1.5 Current Participation and economic data - Southern Hemisphere

Internationally, New Zealand is Australia's closest competitor in the mountain bike tourism market. While New Zealand offers a significant volume of trails, not all trails are necessarily of a world-class standard, often involving poorly constructed volunteer-built trails, fire trails and access roads to add volume to trail distances. Examples of participation in an international context can be seen below;

Rotorua (North Island) is perhaps New Zealand's most recognised and loved mountain bike destination. The 150km+ trail network is regarded around the world for its fast, flowing trails through a working pine forest. Research by APR consulting found that approximately 33% of visitors to the forest in 2007 were Australian.⁴ It was recently reported that mountain bike activity in Rotorua is generating \$10.2m per annum, as opposed to the \$4.6m (one time) in export revenue potentially generated by logging the forest.⁵

Queenstown (South Island) is one of the Southern Hemisphere's leading mountain bike destination. Queenstown has a gravity-based bike park (Skyline Queenstown), along with a number of other regional cross country and all mountain trails. The region is renowned for its iconic long-format descending trails, such as Rude Rock, Corrotown and Skippers Canyon.

A 2017 report by TRC Tourism found that mountain biking contributed over \$25m per year to the local economy.

4.1.6 Current participation and economic data - Northern Hemisphere

Whistler Mountain Bike Park (Canada) is arguably the world's most recognised mountain bike park, offering one of the highest volumes of trail in one venue anywhere in the world. The Whistler Bike Park received approximately 200,000 riders per year (through its green season), but it is estimated that a similar volume of users rides the surrounding valley trail network annually.

A 2016 report commissioned by the Whistler Off Road Cycling Association (WORCA) found that mountain biking contributed over \$79m p.a. to the regional economy of British Columbia. The report also found that over 500,000 individual rides were undertaken in the region in 2016.⁶

Park City, Utah (United States of America) offers hundreds of miles of single-track across a number of riding areas. All riding styles are catered for across public trails, and commercial gravity-based bike parks. This IMBA Gold level mountain bike destination received over 1m visits in 2014.

⁴ Recreational Use and Economic Impact of Whakarewarewa Forest (2009 Update), APR Consultants

⁵ The New Zealand Herald January 17th 2012, Bikes bring more money than wood from Rotorua forest

⁶ CSTA Economic Impact of Mountain Biking 2016

Oregon (United States of America) has a significant cycle tourism industry. Cycle tourism (predominantly mountain biking) was worth over \$400m to the state in 2013, with cycle tourist spending on average 20% more than general tourists.⁷

4.1.7 The future

4.1.7.1 General

The sport of mountain biking has continued to see sustained and exponential growth both in Australia and overseas. With current demand for high-quality riding opportunities still far exceeding supply, there exists significant potential to see excellent return on investment when developing world-class mountain bike trails and facilities.

Dirt Art suggest that the all-mountain category of riding will continue to grow, resulting in an increasing demand for more challenging, descending-focused riding. *Dirt Art* suggests that the next five years will see a huge increase in demand for chairlift or shuttle accessed descending cross-country and all-mountain trail experiences. Many of the major recent and underway mountain biking trail developments focus on these experiences (e.g. Mt Buller Epic, Hollybank Juggernaut, Blue Tier, Derby's Black Stump Shuttle Trails, Thredbo AM Descent and Valley Trail) which are reflective of the increasing demand for this style of descending cross-country / all-mountain trail.

4.1.7.2 E-bikes

While traditional bike technology is likely to continue to stabilise, the rapid emergence of the E-bike is likely to have a significant impact on the sport. In *Dirt Art's* view, E-bikes will never replace the traditional mountain bike, but as technology improves the bikes will become a much more common feature on the trails. E-bikes make the sport more accessible to newer and less-capable riders and increase the ride duration and the accessible elevation range for more experienced riders.

The growth in use of E-bikes will have a distinct benefit to areas such as the West Coast, as vast landscapes and large mountains will typically result in longer climbs and commutes. E-bikes will allow riders to access significant elevation ranges without the need for vehicle shuttles (most E-bikes will provide pedal assistance for up to 2000 metres of climbing) – making multiple ascents and descents of the proposed trails on Mount Owen possible for most riders under their own (E-assisted) power.

It is important to recognise the distinction in E-bikes between high-powered throttle assisted bikes and lower-powered pedal-assisted bikes. Pedal assisted bikes have no additional impacts on trails, whereas throttle powered bikes are illegal in most public areas and will cause significant additional damage to trails.

⁷ Information provided by Destination Oregon.

4.2 Mountain bike tourism

4.2.1 Mountain bike tourism markets

Tourists engaging in mountain biking can be divided into two distinct categories, the 'complementary market'; those who engage in mountain biking as a complementary activity (not as a primary motivator or sole purpose for travel), and the 'enthusiast market' those who have travelled with mountain biking being the primary or sole reason for their trip.

4.2.2 Complementary mountain bike tourism markets

Mountain bike riding as a complementary activity has risen dramatically in popularity in recent years, as the sport has moved beyond the 'extreme sport' image of the past, and more towards the accurate perception of the sport as a safe, inclusive and fun 'adventure' activity.

Complementary visitation is a key component of a successful government-backed mountain bike destination as it allows the capture of a much larger target audience, and promotes longer stays, and increased travel party size. Complementary tourists include valuable family markets, who will often stay longer and spend more than solo and small group tourists.

The emergence of mountain biking as a commercially viable complementary activity has been driven largely through the development of safer, more beginner-friendly trails, and by the growing number of commercial operators including the sport in their activity programs. Commercial viability of mountain biking as a complementary activity requires a lower volume of trail than for the enthusiast market, though the required quality and maintenance demand of trails will be higher. As a complementary activity, mountain biking offers genuine avenues for commercial return, while also potentially lengthening the duration of stay for existing guests. In addition to this, targeted marketing may draw in guests that may otherwise have travelled to an alternative location.

Successfully targeting the complementary tourism market involves careful consideration and delivery against the following key areas;

- High-quality beginner-friendly trails
- A structured progression in difficulty through trail types
- A good volume of smoother flow style trails
- Access to high-quality hire bikes
- Comprehensive and easily interpreted trail signage
- Access to a variety of formal and informal non-riding activities
- Access to a good range of accommodation and food and beverage opportunities.

Dirt Art suggests that the West Coast's primary market will not be complimentary or incidental rider but rather riders who are specifically seeking the particular types of mountain bike experiences available on the West Coast and will seek other activities to pursue in addition to mountain biking. A focus on beginner-friendly trails and the complimentary mountain bike market would be an unsuccessful strategy to employ in the West Coast context given the incompatibility of the geology, climate and relative isolation of the region.

4.2.3 Enthusiast tourist market

The enthusiast market is defined as mountain bike tourists for whom mountain biking is the primary motivator/purpose for their travel. The enthusiast market seeks out new and exciting mountain bike destinations, and typically travel multiple times annually to engage in mountain biking.

The mountain bike enthusiast market is typically populated by 25-45-year-old males with a high disposable income, who are seeking opportunities to travel to destinations with the primary purpose of going mountain bike riding.

While mountain bike riding may be the primary travel motivator, the availability of alternative activities will still influence this traveller as they will often look for destinations where they can viably travel with family, their spouse or non-enthusiast travelling companion/s.

The mountain bike enthusiast is typically travelling for multi-day stays and is seeking unique and high-quality trail experiences. These users will typically seek higher volumes of trail, as they will often ride 30-40km+ per day.

Successfully targeting the enthusiast tourism market involves careful consideration and delivery against the following key areas;

- High quality trails
- Unique and iconic environments
- Iconic signature trail experiences
- High volumes of trails
- A good supply of intermediate to advanced trails.

5 Establishing the West Coast as a mountain bike destination

5.1 Overview

To achieve success in an increasingly competitive mountain bike destination market, the West Coast must develop distinct and engaging trail experiences within Iconic West Coast landscapes that are of sufficient quality to ensure riders are willing to travel to what are contextually remote locations.

The West Coast reflects an excellent opportunity to develop mountain bike trail experiences that are not yet available in Australia for which there is significant, demonstrated demand internationally.

While the opportunity is great, the West Coast also presents unique challenges in its climate, geology, topography and distance from population centres which serve to define the types of trail infrastructure it is feasible to develop in the area and the markets that may be targeted through trail infrastructure development.

There is also a number of existing competing tourism activities for this market already available in the area, including but not limited to, the Wilderness Railway and King River Rafting. *Dirt Art* instead suggest focusing on an intermediate-advanced market, with trail concepts focusing on 'big mountain' riding, which capitalises on the denuded, dramatic mountainous landscape. This style of riding has not been developed in Australia due to a lack of viable development sites but has been extremely successful in locations across North America and New Zealand.

Dirt Art suggest focusing on the following trail styles;

- Big-mountain enduro/trail riding
- Long format descending trails set in unique West Coast environments
- Long format trail rides with significant elevation gain/loss accessing and connecting towns

5.2 Characteristics of the West Coast

5.2.1 Topography

The West Coast is defined by the Southern Ocean to the West, Macquarie Harbour to its south and mountain ranges to its north and east. Relative to the rest of Tasmania the West coast is characterised by high-relief and dominated by the mountains of the West Coast Range which runs roughly north-south through the area and extends from the peaks of Mount Agnew, Mount Heemskirk north of Zeehan through to Mount Darwin and Sorrell south of Queenstown.

5.2.2 Climate

The region has a high annual rainfall, with annual rainfall ranges between 2000 and 3000mm. The frequency and intensity of rainfall events, combined with the exposure and remoteness of elevated areas of the West Coast reflect an environment not suitable for beginner riders. Experienced, competent riders will comfortably contend with the challenges provided by the West Coast climate to access trail experiences that are not available elsewhere.

5.2.3 Geology

Absence of soils with high plasticity and prevalence of gravel makes it extremely difficult to develop beginner and low-intermediate trail experiences on the West Coast. The freely draining gravel of Mount Owen does allow an enjoyable year-round riding surface where other climatic conditions do not limit access.

5.2.4 Vegetation

The West Coast is renowned for areas of dense, essentially impenetrable vegetation. There are however areas, natural and modified by human activities that are sparsely vegetated and good sites for the economic development of unique trail products.

Dense vegetation should generally be avoided due to the increased construction and maintenance costs densely vegetated areas involve. Locating trails in sparsely vegetated areas will not only minimise establishment and maintenance costs, but is essential to provide a distinct experience that will showcase quintessential West Coast environments.

5.2.5 Population and access

Population in the region is widely dispersed, with the greatest population centre being Queenstown. Good facilities and accommodation are available in most towns.

The region is located approximately 3hrs drive from Launceston, 4hrs drive from Hobart. Generally, there are short travel times between population centres once on the West Coast. The area is renowned for its challenging driving conditions, which include tight, narrow and winding roads, and highly-variable climate. These factors make driving challenging for many tourists.

5.2.6 Existing trail infrastructure

The range of existing trails promoted for mountain bike use on the West Coast generally fail to provide experiences of a high enough standard to attract visiting mountain bikers in the increasingly competitive destination Mountain bike market. Any effort to market the existing trails alongside other Mountain bike offerings in Tasmania risks undermining the market position of Tasmania as a high-quality mountain bike destination.

The descending section of the Sterling Valley trail if extended and better access provided consistent with earlier planning stages would reflect a distinct and competitive mountain bike experience that could compliment development consistent with this Strategy.

It is recommended that the Montezuma Falls track from Williamsford to the Falls is promoted as accessible by mountain bike rather than as a mountain bike experience itself.

The signage of existing trails does not make them easy for riders unfamiliar with the area to locate and in many cases is insufficient to allow them to navigate through intersections they encounter on the trails. Signage of any trails developed to a standard suitable for promotion, needs to make them easy to locate from major roads/highways and clearly identify the route.

The landscapes in which some existing trails are located are high quality examples of Iconic West Coast landscapes and should be the site of future, purpose-built mountain bike trail infrastructure consistent with the trail development strategy that follows.

6 Trail Strategy

6.1 Overview

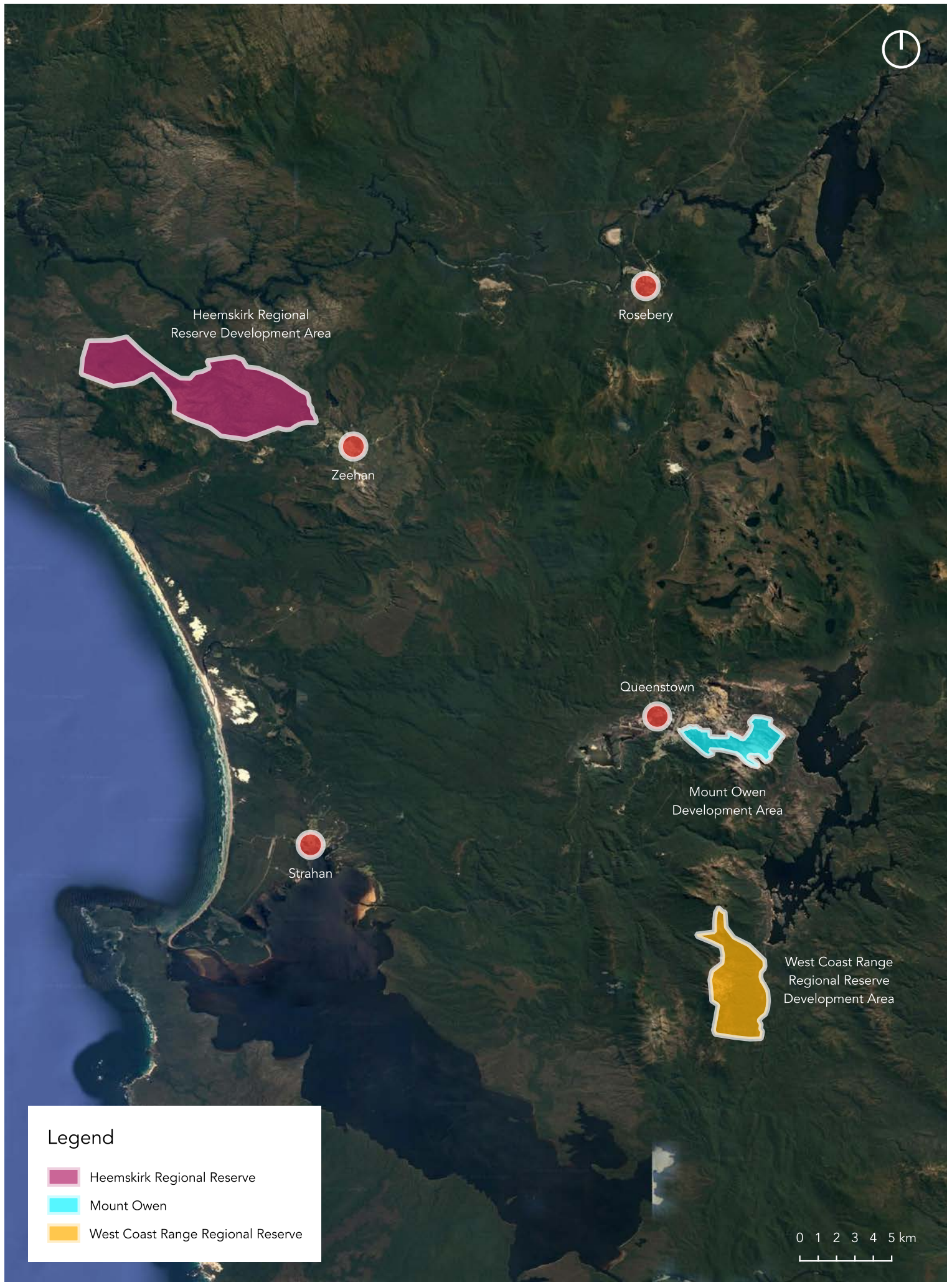
Pursuing the development of big-mountain trail riding and descents is recommended as the priority for the West Coast region. This type of riding is characterised by ascending and descending wide elevation ranges in mountainous environments.

Dirt Art has undertaken a broad investigation of sites before determining that the Mount Owen area offers the strongest development potential for the first stage of establishing the West Coast as a mountain bike destination.

Other sites, specifically the Mount Heemskirk Regional Reserve north of Zeehan and the West Coast Range Regional Reserve area south of Queenstown offer great potential for developing trail experiences that will compliment those developed on Mount Owen and developing big-mountain trail experiences in these areas is recommended in the future.

6.1.1 Location Map

A regional location map can be found over the page.



6.2 Potential development areas for big-mountain trail riding and descents

6.2.1 Mount Owen

Mount Owen's elevation range, proximity to Queenstown, unique landscape and generally-reduced natural values make it the obvious development priority.

The proposed trail experiences conceptualised for Mount Owen are covered in detail in Section 7.

6.2.2 Heemskirk Regional Reserve

The Heemskirk Regional Reserve offers a unique button-grass landscape with significant elevation range close to the amenities of Zeehan. The area has particularly strong scenic values for the visiting rider.

Some trail is currently being developed in far south of the Reserve that aims to connect the existing spray tunnel trail with Heemskirk Road creating a loop. This short section of trail is unlikely to have a significant impact on mountain bike visitation, but it could be included in a more ambitious development that captures the full elevation range and aesthetic experience the area could afford.

It is recommended that as a subsequent development stage, a loop is established that departs existing trail infrastructure of appropriate quality for inclusion and ascends then descends Mount Agnew.

There is also potential to develop a longer route following a historic alignment that traverses a saddle between Mount Heemskirk and Agnew, connecting with Heemskirk Road just south of Granville Road.

6.2.3 West Coast Range Regional Reserve

The West Coast Range Regional Reserve contains multiple mountain peaks, that despite being previously impacted by mining activities and infrastructure offer a distinct landscape and significant elevation range that could accommodate trail experiences to complement those developed on Mount Owen.

South Jukes Peak and Mount Darwin present an opportunity to develop a trail or trails that ascend from Mount Jukes Road adjacent to Lake Burbury across the maximum elevation range accessible potentially traversing between the two mountains.



Legend

Mount Owen Development Area

0 0.5 1 km





7 Priority Development Area Detail– Mount Owen

7.1 Mount Owen Overview

Mount Owen is a mountain of the West Coast Range whose summit is less than five kilometres from the centre of Queenstown. Its sparsely vegetated slopes have become an icon of the West Coast and are a legacy of historic mining activities.

While the landscape of Mount Owen is largely a product of human activity, the aesthetic experience it offers is absolutely unique in Australia and provides an excellent setting for the development of distinct trail experiences that attend to an unmet demand in the mountain bike destination market.

At higher elevations Mount Owen will provide riders with almost constant views of the mountains of the West Coast Range and the Tasmanian Wilderness World Heritage Area to the east and south.

7.2 Land Tenure

The proposed development area falls entirely within Crown Land administered by Crown Land Services/PWS. The boundary of the proposed development area to the north-east is defined by an existing mining-lease held by Copper Mines of Tasmania.

Locating the development entirely within a single tenure type simplifies approval and operational processes. No incursion into the mine-lease area is advised and as such, determining an accurate location of its boundary is recommended prior to detailed design being undertaken.

7.3 Geology and topography

Mount Owen's summit is approximately 1,146 metres above sea level, and approximately 1,000 metres above the town of Queenstown. This elevation range, so close to a population centre is one of the key attributes that makes Mount Owen an excellent site for trail development.

The north-eastern aspect of the Mountain contains most of the proposed trail development. This aspect is composed of a series of ridges and gully that all descend toward Conglomerate Creek, beneath the Lyell Highway.

Horsetail Falls on Moore Creek is a significant natural feature of Mount Owen and one of the key areas the proposed trail development will provide riders the opportunity to experience.

North Owen Peak extends toward the north east and provides spectacular views of Lake Burbury and south toward Frenchmans Cap and the Tasmanian Wilderness World Heritage Area.

Much of the Mountain presents conditions in which it is either not possible or not practical to establish mountain bike trail. This is due to steep side-slopes, cliffs, and exposed bedrock that would prevent establishment of trail benches. Concept trail corridors have been identified within which establishing trail consistent with the proposed technical difficulty rating and construction approach will be possible. Actual trail alignments and attributes must be determined during detailed design.

The geology of Mount Owen is varied and includes areas of conglomerates, quartz, sandstone, siltstone, mudstone and glacial deposits. The gravelly surface of much of the Mountain will dictate the style of trail that can be developed, though a more rugged, rustic style of trail suited to the local geology is consistent with the recommended trail style across the development and reflective of the setting.

7.4 Environmental Values

Mount Owen is an Iconic example of the extreme impact that early mining activity has had on West Coast landscapes. While the denuded landscape is not wilderness in a conventional sense, it is an incredible setting for the development of mountain bike experiences that will provide sensations of wilderness, exposure and its location within the West Coast and Tasmanian environment.

The sparse, regenerating vegetation allows for constant views, which is a key attribute adding to the appeal of Mount Owen as a site for trail development.

While it is expected that the Parks and Wildlife Service will require a Reserve Activity Assessment to be completed for the proposed development, the highly-modified, essentially denuded environment is not expected to present significant natural values that would preclude development.

7.5 Existing Infrastructure

There is a range of existing infrastructure on Mount Owen, though generally it is confined to small areas.

The existing road that departs the Lyell Highway just north of Karlsons Gap and provides access to the communications infrastructure on Mount Owen is accessed by a locked boom-gate with authorised access limited to Government agencies, key-holders and a local tourism operator, Roam Wild. There is an informal access around the boom-gate which is utilised by four-wheel drive vehicles and motorbikes to gain unauthorised access to the road.

The road continues to the communications past some communications infrastructure to an intersection. One branch continues to a pad close to North Owen Peak and the other via a locked boom-gate to communications towers close to the summit.

It is recommended that access to the road is provided for the purpose of accessing the proposed trails for mountain bike use and for authorised tourism/shuttle operators through a license system administered by the proponent of the development. It is understood that during winter and periods of heavy snow, it will be unsafe for the road to be used to access the trails.

It is recommended that all trails avoid the existing communications infrastructure to mitigate the risks associated with the infrastructure and to reduce the complexity of consultation and approvals requirements.

8 Trail Concepts- Mount Owen

8.1 Overview

The Mount Owen area provides an incredible landscape of dramatic, denuded mountain faces, populated with frequent iconic rock outcrops. The mountain offers significant potential for a range of big mountain trail concepts, which capitalise on the iconic terrain and dramatic views afforded by the site. *Dirt Art* has developed a range of concepts, focusing on uplift assisted gravity trails, though including a loop-format trail ride.

8.2 Trail-head

8.2.1 Potential Locations

The preferred trail head location identified during fieldwork is located on Batchelor Street, close to its intersection with Tramway Street. Further investigation of the feasibility of this location and connecting it with the proposed trails must occur during detailed design.

This location provides reasonable corridors through which connecting trails may be positioned, a reasonable area for signage and parking and will allow riders a gentle descent back into the centre of Queenstown, past multiple accommodation providers.

Several alternative locations including the trail-head proposed in the Queenstown Gravity Trails report and design were considered but each presented significant feasibility and safety concerns.

A trail head location closer to the centre of Queenstown may be identified during detailed design though none were discovered during the fieldwork that informs this report.

A trail head location map can be found over the page.



Legend

- Mt Owen - Lower Loop
- Mount Owen Development Area

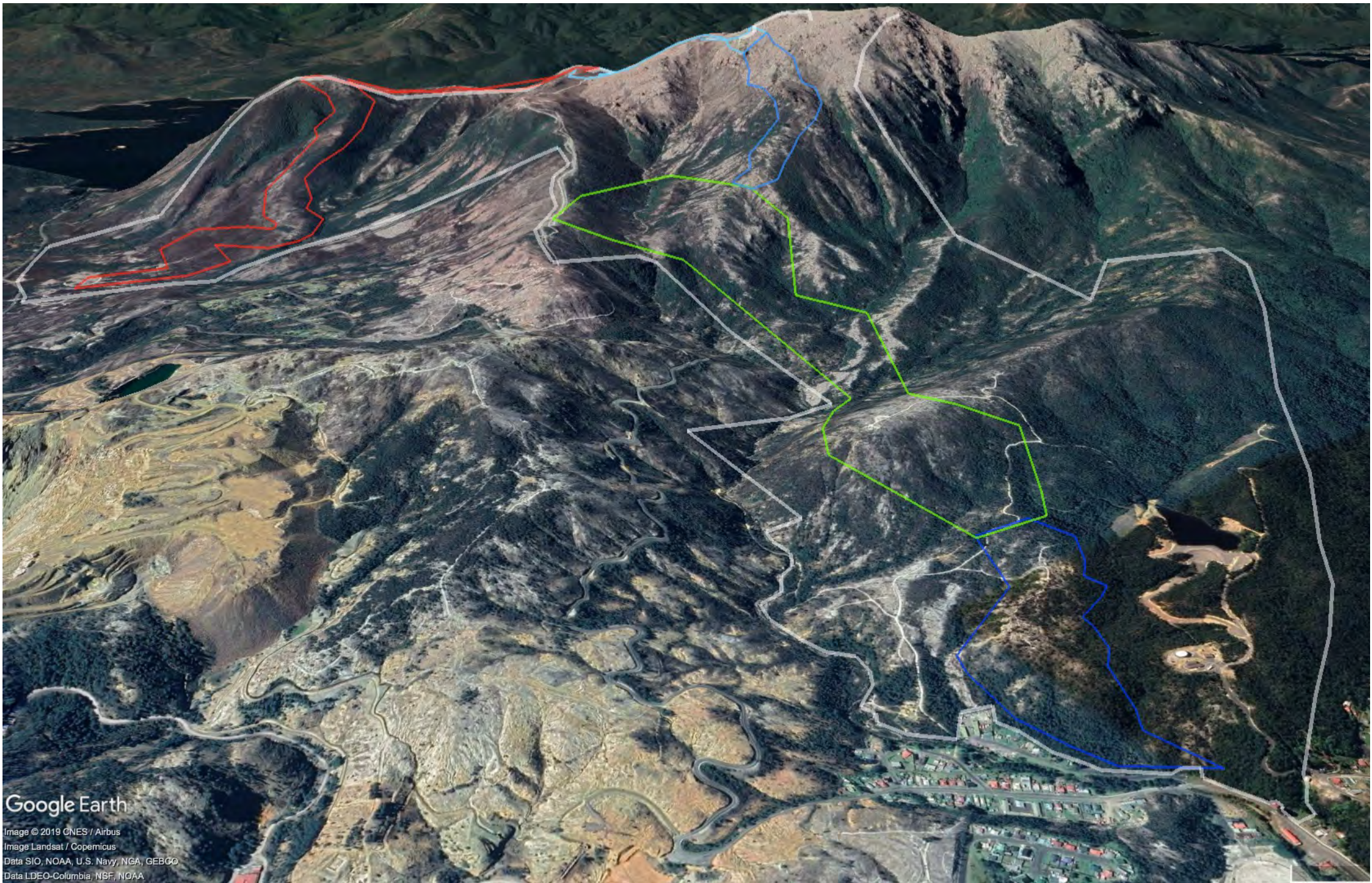
8.2.2 Amenities required

Due to the existing supply of toilets within the town and the likelihood that visiting riders will also be accommodated in the town, the provision of significant trail head facilities is not recommended. Parking for up to ten vehicles should be established.

Dirt Art strongly recommend the installation of a bike wash facility, preferably at the trailhead location to increase the likelihood of riders using it even prior to their ride. The key function of a bike wash is to limit the potential spread of weeds and pathogens, while providing the additional benefit of improving the convenience Queenstown offers to visiting riders.

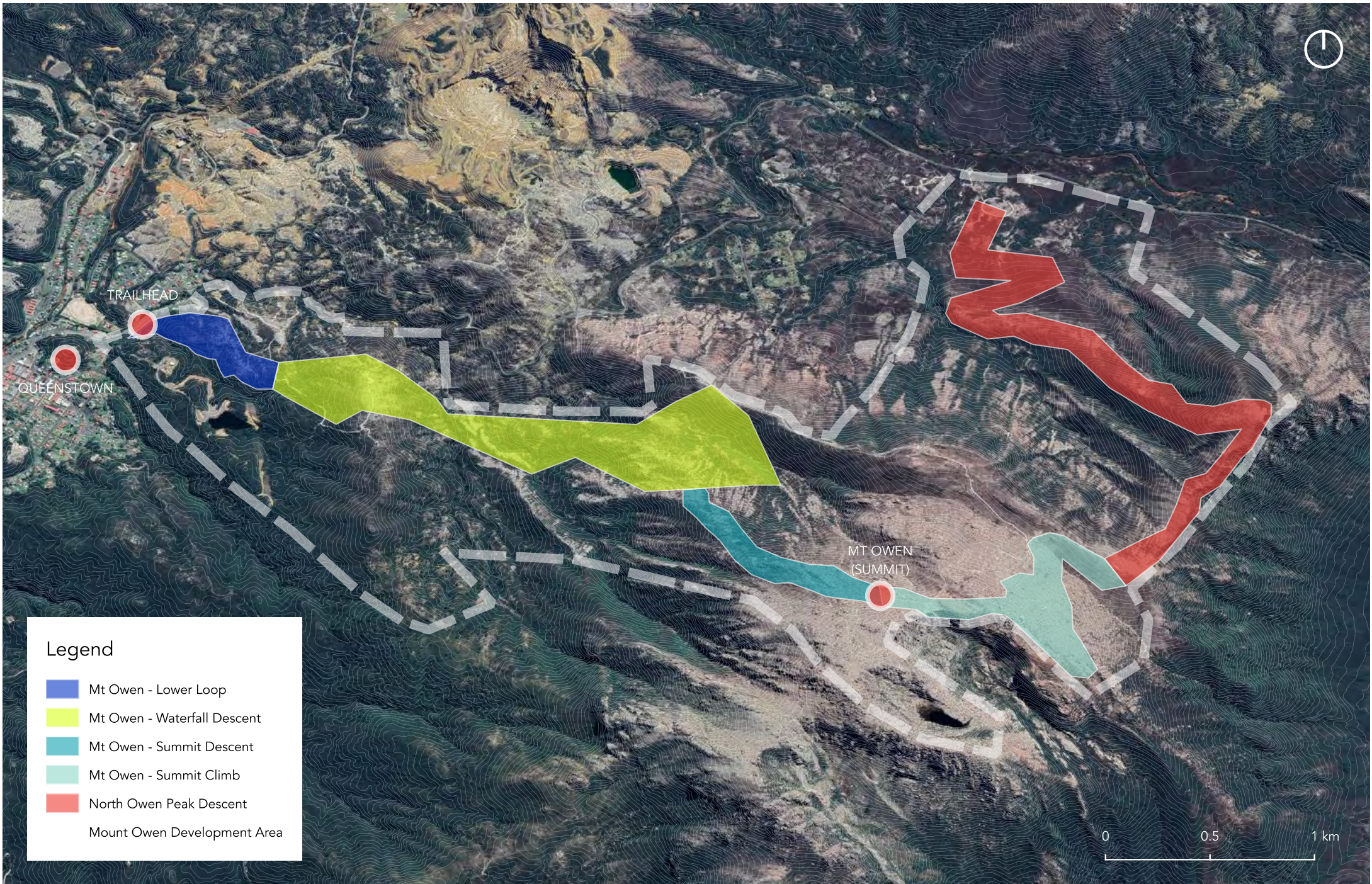
8.3 Trail Concept Maps

See over the page for plans detailing proposed construction corridors. Final trail alignments will be determined during later detailed design phases.



Google Earth

Image © 2019 CNES / Airbus
Image Landsat / Copernicus
Data SIO, NOAA, U.S. Navy, NGA, GEBCO
Data LDEO-Columbia, NSF, NOAA



Legend

- Mt Owen - Lower Loop
- Mt Owen - Waterfall Descent
- Mt Owen - Summit Descent
- Mt Owen - Summit Climb
- North Owen Peak Descent
- Mount Owen Development Area

8.4 Trail Concept 1

Waterfall Descent

Approximate Concept Length	10 km
Type	Descent with some climbs
TDRS	Intermediate/Blue Square
Construction methodology	Machine Construction

Departing the shuttle road, the Waterfall Descent will provide intermediate riders access to the top of Horsetail falls before descending toward Queenstown. The trail will join the Lower Loop and deliver riders to the trail head and into Queenstown itself.

The trail will feature dramatic views, and the chance to stop at the Horsetail Falls, a currently inaccessible site.

8.5 Trail Concept 2

Owen Summit Climb

Approximate Concept Length	5km
Type	Climb
TDRS	Difficult/Black Diamond
Construction methodology	Combination of machine and hand build

Departing the shuttle road, this trail will ascend as far as possible toward the summit of Mount Owen to provide the maximum possible elevation range and views of the West Coast. Riders will enjoy almost constant views to the east and south into the Tasmanian Wilderness world Heritage Area.

The actual terminus of this trail and start of the descent will need to be determined during detailed design. The trail should access the maximum possible elevation range and provide the most extensive experience of the immediate and distant landscape possible.

The trail will likely require a combination of machine and hand construction approaches as dictated by the landscape. The trail style should be sympathetic to the landscape in which it is located. A natural trail tread is recommended with very little use of camber aside for drainage. Construction of technical features is not encouraged, nor should it be required given the rugged trail surface that will be necessary.

8.6 Trail Concept 3

Owen Summit Descent

Approximate Concept Length	5km
Type	Big Mountain Descent
TDRS	Difficult/Black Diamond
Construction methodology	Combination of machine and hand build

The Owen Summit Descent will depart the Summit Climb, descending along and crossing between a series of ridges toward Horsetail Falls and the Waterfall Descent.

The trail will provide a trail experience unrivalled in Australia, showcasing the quintessential West Coast landscape, through a challenging descent that follows dramatic ridge-lines and provides constant views north to the West Coast Range and of the riders eventual destination; Queenstown.

8.7 Trail Concept 4

North Owen Peak Descent

Approximate Concept Length	5km
Type	Big-mountain
TDRS	Double Black Diamond/Very Difficult
Construction methodology	Combination of machine and hand build

The Owen Peak Descent will depart the shuttle/road terminus and transport riders firstly to North Owen Peak and then descend along a suitable ridge. The trail truly embodies the big mountain concept, with the trail weaving down an exposed ridgeline, featuring a range of natural technical trail features.

The trail terminates at Gormanston, a 5-minute drive from Queenstown. Riders may either arrange collection by a commercial or private shuttle/vehicle transfer. This termination point also broadens economic development opportunities beyond the Queenstown area.

8.8 Trail Concept 5

Lower Loop

Approximate Concept Length	5km
Type	Loop with technical features
TDRS	Blue Square/Intermediate
Construction methodology	Machine

The Lower Loop is proposed as a self-contained trail experience for local and beginner-intermediate riders while also being the final section of proposed descending trails. The trail provides a shorter, simpler loop ride, which does not require uplift or a significant climb.

9 Potential Future Concepts

9.1 Overview

The initial phase of this project has allowed for a trail development of approximately 30 kilometres of trail on Mount Owen. *Dirt Art* has also prepared a larger pipeline of additional high-value projects to allow for scaling based on future funding and development opportunities.

This future pipeline of projects provides significant opportunity to diversify the West Coast mountain bike experience, through the provision of a range of unique experiences that capitalise on the unique local landscape.

9.2 Future Concepts

9.2.1 Heemskirk Regional Reserve and West Coast Regional Reserve

See section 6.2. These trails are recommended to complement the proposed development on Mount Owen. Of the two areas, Heemskirk Regional Reserve should be the development priority, due to its proximity to Zeehan, contrasting landscape and some existing development that may be incorporated into a larger trail experience.

9.2.2 Back country trail riding with options for overnight routes

Mountain bike focused bike-packing is a concept that has yet to be launched in Australia, though the format has attracted significant attention in New Zealand. The concept would involve a developing a long format trail or series of connecting trails (80km+), which riders would navigate over multiple days. The trail would access towns allowing riders to utilise existing accommodation providers for 'camps' rather than requiring the development of purpose-built on-trail accommodation or for them to carry camping equipment.

Riders would also be able to ride sections of trail that would be high-quality trail experiences in their own right rather than complete the entire route.

The combination of relatively short distances between population centres, existing utility infrastructure that will enable access for design, construction and management, and the rapid transition from urban to remote, wilderness environments makes the West Coast perfectly suited to this style of development.

Where possible, trails would integrate with and compliment other trail infrastructure and provide opportunities to utilise existing tourism products and operators to complement and enhance the Mountain bike trail experience.

It is recommended that consideration is given to the development of interconnecting trails that link Tullah, Roseberry, Zeehan and Queenstown.

9.2.3 Queenstown trail concepts

In addition to the trails proposed as part of this Strategy, the scale and diversity of the Mount Owen site provides significant opportunity for further development.

It is recommended that consideration is given to further trail development that increases the quality and duration of the experience to be enjoyed by visiting riders. This may include access new areas and points of interest on the Mountain or developing trails with distinct character that capture the unique geology and topography it offers.

9.2.4 Connection with the Wilderness Railway Trail, King River Rafting or other complimentary tourism products

Dirt Art believe there is potential to develop a trail experience that is offered as a point-to-point ride between Queenstown and Strahan, with riders returning via the Wilderness Railway.

This completely unique and ambitious concept would involve incredible back country riding with an iconic rafting and railway experience.

This trail could depart the proposed Mount Owen development area, travel via Mount Huxley and terminating at the King River. Riders and their bikes would then be transported by raft and train to Strahan or returning to Queenstown.

10 Implementation Plan

10.1 Detailed trail design

The concepts provided within this report represent broad trail concepts. The trails will require detailed design, including route flagging on the ground.

Detailed trail design should be undertaken by a specialist trail company, with appropriate experience designing remote area trails.

10.2 Approvals

10.2.1 Parks and Wildlife Service (Reserve Activity Assessment) RAA

As the majority of the proposed development resides on PWS managed land, a Reserve Activity Assessment (RAA) will be required. The specific level of assessment required will be determined by the agency, though given the disturbed, unvegetated landscapes involved, *Dirt Art* would not anticipate a complex RAA will be required.

The RAA process has no statutory approvals timelines, and as such an approvals timeline will be dependent on the prioritisation of the project within the PWS.

10.2.2 Development Application

Given the nature, scale and location of the project and proposed works that compose it, it is likely that a development application (DA) will be required. Final determination of a DA requirement will rest with the West Coast Council.

10.2.3 Geotechnical Assessment

All proposed trails fall within areas mapped by the Department of Premier and Cabinet to possess low to medium potential geotechnical risks. A geotechnical assessment may be required as component of the DA assessment process.

10.2.4 Water Catchment Considerations

Most of the trails proposed for Mount Owen fall within the Queenstown - Conglomerate Creek drinking water catchment and will require consultation with TasWater to further understand what implications, if any the water catchment presents.

10.3 Construction Approach

10.3.1 Machine construction where possible

Most modern mountain bike trail construction is undertaken with mini-excavators in the size range of 0.8 to two tonnes. The use of excavators offers significant improvements in efficiency relative to hand-building in most environments.

There are some areas, particularly at higher elevations within the proposed development area on Mount Owen, where it will not be safe or practical to operate machinery. It is considered that establishing trail in these areas will yield experiences of such high quality that the additional cost of hand-building is warranted.

It is recommended that where possible machine construction is pursued, where this does not adversely impact the experience provided by a trail and where it does not substantially impact the character of the development.

Alignments should be developed during detailed design that where ever possible enable machine construction.

10.3.2 Hand building at higher elevations

The steep slopes, uncertain soil depths and lack of anchor points to secure machinery at higher elevations will require hand-construction of some trails or sections of trails.

A more natural trail character that minimises the construction footprint and the presence of built technical features is recommended for the proposed trails and aligns well with the use of hand rather than machine construction.

10.3.3 Climatic considerations

The occurrence of snow, heavy rainfall, strong winds, low temperatures and low visibility that can be expected, particularly during winter months over the proposed development area on Mount Owen will result in days and potentially months where construction is not safe or practical, particularly at higher elevations.

It is recommended that construction of the proposed trails is scheduled for drier, warmer months and that days where it is still not safe or practical to undertake construction during these periods is anticipated in construction scheduling.

It may be possible to undertake construction at lower elevations during winter months.

10.4 Marketing

10.4.1 Overview

In an increasingly competitive destination mountain biking marketplace, an effective marketing strategy and implementation are critical to the success of a mountain bike destination. Marketing should focus on developing high quality video and photo content, which showcases the unique landscapes and experiences offered by the project. In the case of this project, content should focus on dramatic view sheds and the rugged and iconic terrain that typifies the West Coast region; a focus that is also consistent with the Tasmania brand.

10.4.2 Integrates with recent West Coast re-branding

The proposed trail development and the experiences it will provide align completely with the recent award-winning rebranding of the West Coast facilitated by Council and delivered by *For the People*.

The campaign leverages the rugged and wild, natural and cultural landscapes of the area, as well as the stories that have evolved through many years of exploration, industry and experiences. It is recommended that branding of the mountain bike trails is consistent with and even captured within the existing branding due to the extent of the synergies between the proposed trail experiences and the West Coast brand.

10.4.3 Existing mountain bike branding

A strong and effective brand and logo is essential for the successful marketing of the project. The current West Coast mountain bike brand does not resonate with the market, does not align with the branding of existing Tasmanian mountain bike destinations and does not provide an effective or appealing overarching brand for the project. *Dirt Art* suggest engagement of a specialist branding agency to re-brand the project consistent with the broader West Coast brand.

10.4.4 Marketing opportunities

A number of marketing opportunities are available, noting that as combination of opportunities will likely form the basis of a successful marketing plan for the project. Marketing efforts should focus on;

- Creation of high-quality photo and video content, including construction content
- Social media page for the regional experience
- Social media advertising campaigns
- Influencer visits
- Magazine and media pieces (including video destination showcases)

Given the enthusiast (intermediate-advanced riders) focus, traditional media avenues (such as newspaper and television) are unlikely to be an effective marketing avenue for the project.

10.4.5 Web site

A web site can be a powerful marketing tool, while also providing visitors with valuable navigational and safety information. Following the development, or commitment to develop the trails described in this Strategy, *Dirt Art* suggests that a regionally-focused web site, showcasing trail opportunities throughout the West Coast area should be developed.

There is also potential for the website to document what will be an absolutely unique development process, creating anticipation and awareness in the market even before the trails are commissioned.

10.4.6 Marketing budget

Dirt Art suggest a year one marketing budget of 2.5% of capital investment (\$25k/\$1m investment).

10.5 Signage

10.5.1 Overview

Effective signage is critical for the functionality of any destination mountain bike project, while also assisting in risk and incident management. The signage should focus on large map boards, as well as trail head and way marker signage.

An important consideration is also main road signage, ensuring that visitors are aware of the attraction as they approach via vehicle.

10.5.2 Budget

Dirt Art suggest a signage budget of 2.5% of capital investment (\$25,000/\$1m investment).

10.6 Suggested Development Budget

10.6.1 Overview

See suggested project budget at Appendix 1.

11 Operational Considerations

11.1 Management Models

The majority of land proposed for trail development is managed by the Crown Land Services/ the PWS, although notably, the PWS is unlikely to be the ultimate proponent or beneficiary should the trail development proceed.

Generally, in Australia where large-scale trail development are undertaken, the proponent is a local council, who has an access or lease agreement to utilise the land of parks agencies to develop and operate the trail network.

Dirt Art suggest that the resulting trails should be managed by a single entity, ensuring consistency and cohesiveness in management, and clear avenues for funding and implementation. For the West Coast Project, this entity will most likely be the West Coast Council.

In most cases an access license agreement would be held for the trail corridors only, typically consisting of a 20m corridor to allow for minor trail alignment changes if required.

11.2 Trail Maintenance

Trail maintenance is one of the key operational considerations of any trail destination. In general terms, a high -quality mountain bike destination will require regular maintenance, to ensure trails are maintained to a standard expected by the traveling mountain bike rider. The West Coast project is somewhat unique, with the following key factors relevant;

- The remote and backcountry nature of the trails will result in a lower expectation for a groomed/highly manicured trail surface
- Soils and geology will not allow for a groomed/highly manicured trail surface during construction
- Developing intermediate to advanced trails will reduce the maintenance inputs required to maintain the intended Trail Technical Difficulty Ratings
- A rugged, natural trail surface will be part of the appeal of the West Coast mountain bike products.

Dirt Art suggest that volunteer trail maintenance is not usually a viable approach, particularly, as is the case for the West Coast, where there is not a significant local riding community. Most successful mountain bike destinations, including *Blue Derby* and *Maydena Bike Park* rely on paid, professional maintenance teams. It is recommended that this capacity is developed within Council as the proponent of the trail development.

Dirt Art suggests a maintenance budget of approximately \$1,500 per kilometer per annum would be appropriate.

11.3 Risk and Incident Management

Risk and incident management is a critically important consideration for any mountain bike trail development and should be considered continually throughout the development and construction process. Given the remote nature of many of the trails proposed, a well-considered risk and emergency management plan will be essential for this project.

First and foremost, the majority of the environments proposed for development in this project are not conducive for beginner riders, with harsh and rugged terrain, extreme side slopes and little to no vegetation buffers.

Incidents can be minimised through the following key considerations;

- Predictability in trails
- Low consequence trail features (limited gap jumps, blind drops etc)
- Appropriate trail difficulty grading
- Appropriate signage
- High-quality trail design and construction

Incidents can be managed through the following key considerations;

- Liaison with emergency services
- Noting of key access routes
- Noting of emergency points on all trails
- Consideration of aerial rescue points

12 Community

12.1.1 Business development forums

It is common in mountain bike destination development for trails and related infrastructure to be developed, and the business and investment community to be left to seek out potential opportunities provided by the project. This reactive approach results in a slow business response and often also results in new and refined business products and services that do not meet the needs and expectations of the market.

Dirt Art suggests that business workshops should be hosted as a key project component, to provide new and existing business operators with a comprehensive understanding of the project, the mountain bike market, and the potential opportunities provided by the project.

12.1.2 Increasing participation and engagement

While the recommended focus of the proposed Strategy is providing intermediate and advanced riders trail experiences in Iconic, often remote or exposed environments providing local riders with a more accessible experience of lower difficulty has been proposed as part of this project specifically to foster a local mountain bike culture and develop enthusiasm for the project in the Community.

Providing a small volume (3-5km) of trail at the base of the proposed development area and within easy riding distance of Queenstown will provide local riders and particularly schools and children, with the opportunity to easily access trails and develop the competence and interest required to eventually engage with the other trails proposed as part of this Strategy.

It is recommended that in addition to the proposed development consideration is given to establishing a skills area and skills trail separate to the proposed trails (possibly within or adjacent to school grounds) that can be used by local riders, school programs and skills clinics to provide further recreational opportunities for community.

13 Conclusion

The West Coast provides an excellent opportunity to develop a suite of trail experiences that are unrivalled in the Australian mountain bike market. The rugged and iconic West Coast landscapes provide opportunities to create a range of big mountain trail experiences that will have significant appeal for visiting riders, who previously would need to travel to the northern hemisphere to engage in this type of riding.

Dirt Art has composed a concept plan that offers a world-class suite of mountain bike experiences, including approximately 30km of trails. The proposed trail network focuses on an intermediate-advanced rider market, who are the primary demographic in the destination mountain bike market. Trails have focused on providing longer format descents, which capitalise on unique the landscapes, views and terrain of the area.

The proposed trail network has been located in areas conducive to high-quality, cost-effective construction, avoiding low-lying, wet areas and areas featuring dense vegetation. These characteristics will ensure ongoing maintenance costs are minimised, while creating as suite of trail experiences that are functional in most weather conditions.

A strong focus has been placed on economic development, with all trails essentially terminating within Queenstown, and enough trail proposed to encourage multi-day visits. Due to the uplift/gravity nature of the trails, there also exists significant business development opportunity for shuttle bus uplift provision.

The proposed trail network offers a significant opportunity to develop a suite of mountain bike experiences that genuinely capture international attention. The rugged, big mountain landscapes will provide a level of content that will undoubtedly grace photos and videos that reach a genuinely international audience. For a relatively low development cost, the proposed trails fill a void in the growing suite of Tasmanian mountain bike experiences and will play a significant role in the growing push towards showcasing Tasmania as one of the world's great mountain bike destinations.

14 Appendix 1- Proposed Development Budget

See full report

15 Appendix 2- Inspiring Place Peer Review

inspiring place



Draft Mountain Bike Strategy for West Coast Tasmania

Peer Review Report

DirtArt and West Coast Council

May 2019

Contents

1 Introduction	1
2 Strategic Context.....	2
2.1 Policy Framework	2
2.1.1 State Level	2
2.1.2 Regional Level.....	4
2.2 Visitor Market Trends.....	5
2.3 Mountain Bike Market	7
2.4 MTB Destination Building	10
3. Potential Benefits	12
4. Summary	14

1 INTRODUCTION

Consultants Dirt Art were engaged by the West Coast Council to develop a strategy to guide investment in trail infrastructure to establish the West Coast as a viable mountain bike trail destination. The *Draft Mountain Bike Strategy for West Coast Tasmania* provides:

- an analysis of mountain bike planning within Tasmania;
- a review of the recent history in investigating mountain bike route opportunities on the West Coast;
- a profile of the mountain bike market and related growth in the bike tourism market;
- the key trends in the mountain bike market (world, national and locally);
- an assessment of the West Coast to become a mountain bike destination;
- a trail strategy that assesses various potential trail locations within the West Coast region;
- identifies a preferred trail location at Mount Owen and initial trail route concepts; and
- an implementation plan for the design, development approval, construction, marketing and management operation.

Inspiring Place were requested to undertake an initial 'peer' review of the *Strategy*. The review indicated support for the key findings of the *Strategy* including:

- the need to plan, construct and manage mountain bike trail experiences based around it's point of difference with other MTB destinations in Tasmania;
- scope for high quality 'big mountain' trail experiences and back-country trails that capture the landscape and terrain for the intermediate - advanced rider market;
- desire to avoid areas known to have potential natural and cultural significance including the Tasmania Wilderness World Heritage Area, which will help reduce statutory approval processes;

capacity to achieve high quality but cost effective construction so as to limit capital investment and ongoing maintenance costs;

the selection of Mount Owen (recognised as an unique barren landscape resulting from the impacts of past mining and logging activity) which is located in close proximity to Queenstown as the priority development area;

opportunity for 'big mountain' and back country trail ride experiences with Mount Owen having a 1000m elevation above Queenstown;

capacity for a commercial operator to run a MTB shuttle service operation with a potential shuttle road already in place and a trail head positioned in the town; and

the potential advantage of Queenstown being able to service the local and visitor market, and achieve economic and social benefits from the increased visitors, length of stay and spend in the local area.

This report adds further comment on the strategic context for the proposed mountain bike riding destination on the West Coast and the potential benefits that would result from the development.

2 STRATEGIC CONTEXT

2.1 POLICY FRAMEWORK

2.1.1 State Level

The *Tasmanian Mountain Bike Plan 2008*¹ provided a framework for the coordinated development, management and marketing of mountain bike opportunities in Tasmania.

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

¹ Inspiring Place 2008. Tasmanian Mountain Bike Plan, Department of Economic Development, Tourism and the Arts

The Plan recommended the development of a hierarchy of MTB trails and locations be adopted in Tasmania based around the levels of:

- potential IMBA Epic Ride;
- iconic Wild Rides;
- MTB Adventure Centres;
- regional MTB trail hubs and bike parks; and
- local MTB trails

In the last decade there has been a substantial investment in a range of mountain bike riding destinations across Tasmania including Glenorchy MTB Park, Meehan Range, Blue Derby, Maydena Bike Park, Wild Mersey, Hollybank, Dial range/Penguin Mountain Bike Park and Wellington Park. These destinations are servicing the rapid growth in local mountain bike riding and attracting increased riders nationally and from overseas. Blue Derby hosted an Enduro World Series Event in 2017 and 2019. Currently there are feasibility investigations into the development of further mountain bike trails in the Huon Valley, West Coast, Blue Tier – St Helens, George Town and the lower foothills of Wellington Park/Kunanyi.

The proposed West Coast MTB trails at Mount Owen fits well with the concept of an iconic wild ride and potentially an epic ride within the State, as envisaged in the *Tasmanian Mountain Bike Plan 2008*. The iconic wild ride is defined as being a world-class trail experience located within the wild landscapes of Tasmania. The Mount Owen trail can meet the 'core' criteria of being:

- 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;
- a trail destination that 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;
- trails that offer a strong sense of naturalness and remoteness; and
- trails that offer inspiring and challenging experiences for intermediate to advanced MTB riders, but may also incorporate easier sections or alternatives.

The proposal is consistent with the vision outlined in the *T21 – The Tasmanian Visitor Economy Strategy* which places visitation at the core of Tasmania's economic

agenda through taking a strategic approach by government and industry to achieve 1.5 million annual visitors by 2020, and ensure the opportunities generated by this growth are shared across Tasmania. The *Plan* indicated that Tasmania's globally renowned natural environment is one of the state's most valuable assets and underpins the state's reputation as a must-visit destination.

Connection with these assets helps drive visitation into regional areas, especially the West Coast. Two of the key priorities to assist growth and development of Tasmania's visitor economy are investing in quality visitor infrastructure and building capability, capacity and community in the tourism industry. Tourism Tasmania recently announced that mountain bike riding would be one of the key niche markets for the coming years.

2.1.2 Regional Level

The *West Coast Community Plan 2025* identified the need to be proactive and creative in diversifying the region's industry base. Tourism is recognised as a significant driver of the economy making up 15% of all West Coast employment compared with 2.5% of all tourism sector employment in Tasmania.

The Plan refers to aspirations expressed within the local community that:

“...a large variety of outdoor activities that utilise the beautiful environment with a boosted tourism population that connects the whole west coast. Rock climbing, kayaking, cycle paths and improved family activities and connections facilities to support active lifestyle despite the rain. A connected community that has a strong sense of well-being and support and most of all pride in the beauty of the west coast.”

“...a 'special place' that attracts visitors from all over the world to enjoy a taste of the lifestyle, and the freedom to enjoy a pristine environment”

The West Coast Council has a proactive approach to economic development to encourage job growth and a sustainable community within the region. This involves supporting the attraction of new investment via business, events, visitors and new residents.

The *West Coast Destination Action Plan 2016-2020* identified the opportunity for developing an adventure hub in the region. One of the priorities to refresh the destination brand and unique positioning of the West Coast was to build upon the recognized strengths of a cool climate wilderness, outdoor active diversity, pioneer heritage and contemporary culture. One the priorities for development of existing and new product to meet market demand was to review the needs and opportunities

to improve maintenance of tracks, trails and features of interest to help extend visitor length of stay and satisfaction.

The proposed West Coast MTB trails at Mount Owen has the potential to boost the local economy and create opportunities for increased visitors, longer stays and greater expenditure within the regional economy. It will be a catalyst to establish or expand local business, create new employment opportunities and utilise local services.

2.2 VISITOR MARKET TRENDS

Tables 1 and 2 indicate the need for further investment in the tourism industry on the West Coast, and possibly at Queenstown.

Table 1 indicates that whilst the visitor numbers have been increasing on the West Coast with the continued growth of visitation to Tasmania, the market share of the overall visitor market remains the same. Table 2 shows that Queenstown has experienced a growth of 15,454 visitors since 2015 but the overall market share of the Total West Coast remains the same.

	2015	2016	2017	2018
Total West Coast	173,243	183,984	193,871	196,466
Tasmania	1,158,067	1,241,228	1,269,743	1,318,458
Market Share of Total West Coast of Total visitor to Tasmania	14.9%	14.8%	15.3%	14.9%

Table1 Total Visitors (Interstate and Overseas Adult Visitors) – Total Tasmania and Total West Coast 2015-2018, Tasmanian Visitor Survey

	2015	2016	2017	2018
Total West Coast	173,243	183,984	193,871	196,466
Queenstown	120,377	133,174	136,732	135,831
Market Share of Queenstown in the Total West Coast	69.4%	72.4%	70.5%	69.1%

Table 2 Places Visited (Interstate and Overseas Adult Visitors) – Total West Coast and Queenstown 2015-2018, Tasmanian Visitor Survey

Table 3 suggests that the average number of nights spent on the West Coast has been growing whilst Queenstown has tended to have declining number of nights stayed.

	2015	2016	2017	2018
Total West Coast	2.5	2.9	2.3	2.7
Queenstown	2.1	1.7	1.9	1.7

Table 3 Average Nights Stayed (Interstate and Overseas Adult Visitors) – Total West Coast and Queenstown 2015-2018, Tasmanian Visitor Survey

Table 4 shows that there has been a growth of 23.8% in adult visitors from interstate and overseas between 2015 to 2018 undertaking mountain bike riding during their visit to Tasmania.

	2015	2016	2017	2018
Undertake MTB riding	13,223	19,844	20,578	25,468

Table 4 MTB Activities (Interstate and Overseas Adult Visitors) – Tasmanian Visitor Survey

Investment in the proposed West Coast MTB trails at Mount Owen has the potential to attract new visitors to the region, substantially increase the overnight stays at Queenstown and encourage longer stays.

2.3 MOUNTAIN BIKE MARKET

Mountain bike riding has dramatically increased in recent decades to become a popular main-stream outdoor activity that caters for local riders and in well-developed destinations, increasing numbers of national and international visitors.

The *Mountain Bike Tourism Market Profile for Tasmania 2008*² prepared a indicative visitor profile for experienced mountain bike riders based on a review of various Australian and international information sources. The majority of experienced mountain bike riders :

- are male (up to 80 or 90%), however, it is expected that there will be a noticeable gender shift in years to come with growing participation of women involved with MTB riding;

- have tertiary level education, and come from professional or technical backgrounds;

- have higher than average incomes;

- 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 a day away from home for the majority of mountain bike trips, but will travel further for unique experiences or competitions;

- ride once to 2-3 times per week;

- generally access information about a destination through word of mouth or the internet; and

- cite features such as fitness/exercise, technical challenge, spectacular scenery, local culture, and accessibility as important attributes for MTB destinations.

The independent mountain bike rider (attracted to destinations) will:

- consider the MTB destination as the main trip motivator;

- travel with their own bike

- generally have high fitness and technical ability;

² Inspiring Place 2008. Mountain Bike Tourism Market Profile for Tasmania

be seeking adventure, skill and physical challenge in exceptional natural landscapes;

be 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'

be seeking non-crowded, natural destinations;

likely to fit into the 'all mountain' category (cross country and downhill elements);

require good quality base facilities (e.g. track signage, digital apps, maps and track notes, access to bike shops, accommodation, mobile phone coverage and dining);

generally rely on web-based information, or word of mouth;

be willing to pay for a quality mountain bike experience;

consider competing in events; and

consider participation in a supported mountain bike tour program (e.g. pre-arranged accommodation, with bike specific facilities and gear, transport, rather than guided tours).

Market research since that time has tended to support these findings. Market research in Victoria³ involving in-depth interviews and a 600 online survey of respondents found:

30% of the market were 'committed group riders' – young and enthusiastic riders, highly involved in sport, often travel overnight and pushes own fitness and skill level;

28% were active adventurers – experienced riders, take regular day trips, sometimes ride alone, motivated by getting into the great outdoors and exploring new areas;

66% male and 34% female riders;

50% of the riders were in the 25-39 age group;

the majority of riders were attracted by a combination of three motivations – adventure, fitness and socialising;

³ Quantum Market Research 2016, Tourism North East Mountain Bike Rider Segmentation

the type and maintenance of the trails is a big factor in choosing the MTB destination;

strong reliance on word of mouth and, mountain bike websites and social media as the information source;

almost half would consider riding electric mountain bikes; and

strong preference for intermediate/blue trails.

An online survey of 2900 riders within Australia during 2016⁴ found:

over half of the riders spent 1-2 hours on their typical mountain bike ride;

50% preferred all mountain trails and 32% preferred cross country trails;

80% enjoyed fast and flowy trails whilst 75% enjoyed open/fast and technical trails;

61% preferred intermediate/moderate difficult (blue trails) and 30% advanced/most difficult (black trails);

over 25% of riders use a shuttle bus or chairlift to access riding;

55% were members of a mountain bike/cycling club or organisation;

55% had participated in an organised mountain bike race or event in the past 12 months with half being involved in cross country endurance races/events; and

69% had travelled to another state in Australia to undertake mountain bike riding and 35% had travelled overseas to do so.

The proposed West Coast MTB trails at Mount Owen is well positioned to capture new market interest for the West Coast. The existing promoted MTB trails on the West Coast (e.g. Montezuma Falls track, Stirling Valley Track, Climes Track) provide older style trail riding experiences that do not meet current MTB rider expectations and do not have the potential to attract significant market growth against other competitive MTB destinations.

⁴ DirtArt 2016 Australian Mountain Bike Market profile – Survey Data

The *Draft Mountain Bike Strategy for West Coast Tasmania* indicates the potential for:

satisfying the demand and appeal for visiting new or exciting mountain bike destinations offering multi-day stays and support attractions;

'big mountain' trail rides within the distinctive landscape values surrounding Queenstown;

Mount Owen trail to become the leading MTB trail for the West Coast;

the capacity for loops within the destination and not just point to point trails;

expected growth in the all-mountain riding discipline with demand for more challenging descents including big-mountain enduro/trail riding using long descending trails; and

demand for shuttle bus service and chairlifts to provide convenient access for descending cross-country and all-mountain trail riding experiences.

2.4 MTB DESTINATION BUILDING

The proposed West Coast MTB trails at Mount Owen is about planning, designing, constructing and managing a mountain bike destination that will attract interest from local, interstate and overseas mountain bike riders. Fundamental to building a MTB destination are:

defining the point of difference about the destination;

understanding the market and the key product/experiences being offered;

creating a strong community and industry based vision for the future of the mountain bike destination; and

developing a management structure with a clear destination focus and capacity for building a collaborative network with partners.

The *Kentish Mountain Bike Trails Master Plan 2015*⁵ identified a range of criteria for the potential of a MTB destination and an assessment of these criteria are outlined in Table 5.

Criteria	Potential of the Mount Owen MTB Trail Destination
High quality, sustainable trail infrastructure	This is a requirements for a successful MTB destination and the Mt Owen will provide year-round riding surfaces with potentially limited impacts on the environment due to erosion and loss of vegetation.
Diversity of trail types and styles for a variety of users	The initial concept is for 5 individual mountain bike trails of which 2 are intermediate (blue) for a total length of 15 kms, 2 are difficult (black) for a total length of 10 kms and 1 is very difficult (double black) for a length of 5 kms. The Strategy report also refers to high-value projects in the longer term including a back country trail which riders would negotiate over several days with use of existing accommodation or camps/huts, similar to developments on the Heaphy Trail and Old Ghost Road in New Zealand.
Sufficient riding opportunities to fill 2 to 3 days	The proposal has the capacity to provide multi-day rides including use of other developed day rides within the region.
Range of different difficulty levels	Mt Owen is considered suitable for a range of big mountain bike trails that provide experiences above the tree line and use long format descents. These riders are focused on the needs of intermediate to experienced bike riders, that form the core part of the MTB visitor market.
IMBA recognition	There is potential to seek IMBA recognition as a ride centre once the trail network has been developed. This includes the potential for the proposed back country trail to be recognised by IMBA as an EPIC ride.
Accessibility - Provision of transport	There are various transport services to reach the West Coast by private vehicle, rental vehicle, public transport and air services (via Hobart and Wynyard). New flights are being offered from Hobart to Strahan. The opportunity for connecting shuttle services exists with development of the MTB destination.
High quality pre-trip information	New information will need to be created for the MTB destination including the capacity for downloading phone app information, trail maps, GPS data and other information.
High standard trailhead or nearby facilities	The location of the trailheads will be part of the detailed feasibility investigations yet to be undertaken. The opportunity to start (shuttle service) and end trails at Queenstown is an attractive option for the MTB destination.
Sustainable management of trails and infrastructure	The proposal is contained within a single land tenure of Crown Land managed by Crown Land Services and PWS. The management structure and resourcing of capital improvements and maintenance will form part of the detailed feasibility investigations yet to be undertaken.

⁵ TRC 2015 Kentish Mountain Bike Trails Master Plan

Criteria	Potential of the Mount Owen MTB Trail Destination
Events	The proposed has the potential to host future MTB events similar to the success of Blue Derby with the Enduro World Series and National Marathon Championships given the location and provision for 'big mountain' bike trails. This will add to the capacity of Tasmania to host a range of MTB events in the future.
An attractive landscape, natural beauty and cultural attractions	Dramatic denuded mountain landscape with rocky outcrops and long ridges that are different to other MTB destinations
Range of bike-friendly accommodation options	Potential to utilise existing accommodation within Queenstown, allow adaptation to better cater for rider needs or attract new investment
Cafes, food, beverage and retail businesses	The increase in the visitor market will support existing businesses or provide the basis for new investment to do so.
Supporting bike-related services	Capacity to provide services (e.g. bike hire, shuttle service, bike equipment and repair) with the MTB development model. Some existing businesses may be interested to provide support services.
Quality commercial tours (guided and self-guided)	New business opportunity to expansion of existing tour operator services to accommodate tours.
Community engagement and support	Past community engagement including the <i>West Coast Community Plan 2025</i> suggest strong community support for establishing a MTB destination on the West Coast.
Strong positioning as a mountain bike destination	The remoteness and wild character of the West Coast provides a strong point of differentiation for the MTB destination.
Coordinated destination marketing and promotion	It will be in the best interests of operators, bike groups, land managers and the regional tourism industry to work effectively to position the West Coast as an outstanding MTB destination.

Table 5 Assessment of Destination Criteria

3. POTENTIAL BENEFITS

Trails are often the lifeblood of a well-connected region's open space network and area catalyst for tourism and economic growth. Trails deliver health and wellbeing, social, environmental, educational, transport, tourism and economic benefits for both residents and visitors.

The West Coast has the potential to deliver on all of these fronts, giving focus to new trail development and experiences over the next decade. By establishing clear priorities, a well-founded governance strategy and guidelines for design and marketing, a sustainable mountain bike trail destination will deliver sustainable benefits back to the State, region and local community.

The project will need to evolve with diligent understanding of the policy framework, inherent natural and cultural values, realistic provision of management resources, the

potential to attract investment partnerships, market appeal and building upon the competitive strengths of the destination.

The benefits from the Mt Owen trail proposal in the short to medium term include:

- new attraction that will help diversify the tourism product and visitor market base to the West Coast;
- access to a diversity of mountain bike trails of varying difficulty, length, type and overall experience;
- access to 'big mountain' descents and back-country trail riding experiences that are not available in Australia;
- potential to engage and support other visitor activities within the region and State, including close proximity to visit the Tasmanian Wilderness World Heritage Area;
- enhanced lifestyle with increased opportunities for local participation in outdoor activities that improve overall health and wellbeing;
- employment opportunities during construction and operation of the Mt Owen MTB destination including support businesses and services;
- improves viability of existing businesses with increased visitation and spend;
- potential compliance with statutory approval processes;
- potential to be sustainably designed and consistent with IMBA standards;
- limited or managed impact on the area's natural and cultural values;
- upgrading or new provision of visitor facilities that may also cater for other activities; and
- limited impact on other recreational user groups.

The potential benefits in the longer term include:

- consistency with the Tasmanian brand;
- help diversify the tourism industry which is vital to the future of the West Coast regional economy;

ongoing economic benefit to the region from increased visitors,
longer stays, increased spend and employment opportunities;

strengthening West Coast as an adventure based destination;

improving the opportunities to address seasonality in the tourism
industry given mountain bike riding can be an all-year activity;

creating new opportunities for expanding business activity;

adds to the diversity of national and world class MTB experiences
offered within Tasmania; and

capacity to host national and international MTB events in
Tasmania (multi MTB destinations) and on the West Coast.

4. SUMMARY






The *Draft Mountain Bike Strategy for West Coast Tasmania* is a timely report to strategically position the West Coast as a high quality mountain bike destination within Tasmania.

The report indicates the distinctive point of difference for MTB riding on the West Coast and in particular the potential for high quality 'big mountain' trail experiences and back-country trails that will capture the landscape and terrain for the intermediate - advanced rider market. Access to 'big mountain' descents and back-country trail riding experiences are currently not available in Australia, and the proposed trail rides based around Mt Owen will become the new leading MTB trail experience for the region. The proposed investment in the region compliments and enhances the market appeal of Tasmania as a world class MTB destination.

The development of a sustainable mountain bike trail destination on the West Coast will deliver sustainable benefits back to the State, region and local community.

16 Appendix 3 - IMBA TDRS

IMBA Trail Difficulty Rating System

	VERY EASY  White Circle	EASY  Green Circle	INTERMEDIATE  Blue Square	DIFFICULT  Single Black Diamond	EXTREME  Double Black Diamond
Description	Likely to be a fire road or wide single track with a gentle gradient, smooth surface and free of obstacles. Frequent encounters are likely with other cyclists, walkers, runners and horse riders.	Likely to be a combination of fire road or wide single track with a gentle gradient, smooth surface and relatively free of obstacles. Short sections may exceed these criteria. Frequent encounters are likely with other cyclists, walkers, runners and horse riders.	Likely to be a single trail with moderate gradients, variable surface and obstacles. Dual use or preferred use Optional lines desirable	Likely to be a challenging single trail with steep gradients, variable surface and many obstacles. Single use and direction Optional lines XC, DH or trials	Extremely difficult trails will incorporate very steep gradients, highly variable surface and unavoidable, severe obstacles. Single use and direction Optional lines XC, DH or trials
Trail Width	2100mm plus or minus 900mm	900mm plus or minus 300mm for tread or bridges.	600mm plus or minus 300mm for tread or bridges.	300mm plus or minus 150mm for tread and bridges. Structures can vary.	150mm plus or minus 100mm for tread or bridges. Structures can vary.
Trail Surface	Hardened or smooth.	Mostly firm and stable.	Possible sections of rocky or loose tread.	Variable and challenging.	Widely variable and unpredictable.
Average Trail Grade	Climbs and descents are mostly shallow. Less than 5% average.	Climbs and descents are mostly shallow, but may include some moderately steep sections. 7% or less average.	Mostly moderate gradients but may include steep sections. 10% or less average.	Contains steeper descents or climbs. 20% or less average.	Expect prolonged steep, loose and rocky descents or climbs. 20% or greater average
Maximum Trail Grade	Max 10%	Max 15%	Max 20% or greater	Max 20% or greater	Max 40% or greater
Level of Trail Exposure	Firm and level fall zone to either side of trail corridor	Exposure to either side of trail corridor includes downward slopes of up to 10%	Exposure to either side of trail corridor includes downward slopes of up to 20%	Exposure to either side of trail corridor includes steep downward slopes or freefall	Exposure to either side of trail corridor includes steep downward slopes or freefall
Natural Obstacles and Technical Trail Features (TTFs)	No obstacles.	Unavoidable obstacles to 50mm (2") high, such as logs, roots and rocks. Avoidable, rollable obstacles may be present. Unavoidable bridges 900mm wide. Short sections may exceed criteria.	Unavoidable, rollable obstacles to 200mm (8") high, such as logs, roots and rocks. Avoidable obstacles to 600mm may be present. Unavoidable bridges 600mm wide. Width of deck is half the height. Short sections may exceed criteria.	Unavoidable obstacles to 380mm (15") high, such as logs, roots, rocks, drop-offs or constructed obstacles. Avoidable obstacles to 1200mm may be present. Unavoidable bridges 600mm wide. Width of deck is half the height. Short sections may exceed criteria.	Large, committing and unavoidable obstacles to 380mm (15") high. Avoidable obstacles to 1200mm may be present. Unavoidable bridges 600mm or narrower. Width of bridges is unpredictable. Short sections may exceed criteria.