

A person wearing a red long-sleeved shirt and a helmet is riding a mountain bike on a rocky trail. The scene is set in a forest with tall, thin trees and large rocks. The lighting is warm, suggesting sunset or sunrise, with a golden glow over the landscape. A light green triangle is visible in the top right corner of the image.

# Canberra Mountain Bike Report

2021



## Prepared by

The Canberra Mountain Bike Report has been prepared by TRC Tourism Pty Ltd for ACT Parks and Conservation Service.

## Acknowledgements

We acknowledge the Traditional Custodians of the ACT, the Ngunnawal people. We acknowledge and respect their continuing culture and the contribution they make to the life of Canberra and the region.

TRC Tourism would also like to acknowledge the contribution of the many stakeholders involved in this project, particularly the Project Reference Group: Rod Griffiths, National Parks Association, Jake Hannah, Majura Pines Trail Alliance, Mic Longhurst, Dynamic Motivation, Raynie McNee, Cycle Education, Lisa Morisset, Mountain Bike Australia, Kelly Ryan, Visit Canberra, Darren Stewart CORC, Jeff VanAalst, Stromlo Forest Park, Alan Vogt, Kowalski Brothers, Ryan Walsch, Fixed by Ryan and Claire Whiteman.

Images: Courtesy of ACT Government, Spring Photo Competition, credits shown with image

Front Cover Photo: Andrew Buesnel- Spring Photo Competition ACT Government

Map Design: TRC Tourism and Alan Vogt

## Disclaimer

Any representation, statement, opinion or advice, expressed or implied in this document is made in good faith and on the basis that TRC Tourism Pty Ltd is not liable to any person for any damage or loss whatsoever which has occurred or may occur in relation to that person taking or not taking action in respect of any representation, statement or advice referred to in this document.



[www.trctourism.com](http://www.trctourism.com)

# Contents

Executive Summary	v	
<u>1</u>	<u>Introduction</u>	<u>1</u>
<u>2</u>	<u>Strategic Context</u>	<u>5</u>
<u>3</u>	<u>The Mountain Bike Tourism Market</u>	<u>9</u>
<u>4</u>	<u>The Characteristics of Mountain Bikers</u>	<u>15</u>
<u>5</u>	<u>What Makes a Successful Mountain Bike Destination?</u>	<u>21</u>
<u>6</u>	<u>Canberra as a Mountain Bike Destination</u>	<u>24</u>
<u>7</u>	<u>Investing in New Trails - Potential Locations</u>	<u>43</u>
<u>8</u>	<u>The Investment Strategy</u>	<u>60</u>
<u>9</u>	<u>A Sustainable Management Model for the ACT</u>	<u>70</u>
<u>10</u>	<u>Benefits of Investment</u>	<u>75</u>
<u>11</u>	<u>Conclusion</u>	<u>79</u>
Appendices		80
a.	Appendix: Consultation Summary	81
b.	Appendix: Case Studies	88
c.	Appendix: Locations where cycling is permitted on multi use trails	102
d.	Appendix: Mountain Bike (MTB) Trail Standards	103
e.	Appendix: Rotorua Mountain Biking - Management & Governance	104

## Abbreviations

---

ACT	Australia Capital Territory
-----	-----------------------------

---

AUD	Australian Dollar
-----	-------------------

---

CBD	Central Business District
-----	---------------------------

---

CBR	Canberra
-----	----------

---

CORC	Canberra Off-Road Cyclists
------	----------------------------

---

DH	Downhill
----	----------

---

EIS	Environment Impact Statement
-----	------------------------------

---

ESO	Environmental Significance Opinion
-----	------------------------------------

---

FTE	Full-Time Equivalent
-----	----------------------

---

IMBA	International Mountain Bicycling Association
------	--

---

PCS	ACT Parks and Conservation Service
-----	------------------------------------

---

MOU	Memorandum of Understanding
-----	-----------------------------

---

MRC	Murrumbidgee River Corridor
-----	-----------------------------

---

MTB	Mountain Bike
-----	---------------

---

MTBA	Mountain Bike Australia
------	-------------------------

---

NSW	New South Wales
-----	-----------------

---

NZ	New Zealand
----	-------------

---

SFP	Stromlo Forest Park
-----	---------------------

---

UCI	Union Cycliste Internationale
-----	-------------------------------

---

VFR	Visiting Friends and Relatives
-----	--------------------------------

---





Credit: Andrew Buesnel - Spring Sunrise at Stromlo



# Executive Summary

Mountain biking is one of the world's fastest growing and most popular family friendly lifestyle activities. Approximately 3.5 million visitors travelling in Australia participate in cycling activities or events either as a participant or as a spectator each year and many participate in mountain biking. In the last ten years participation in both recreational and competitive mountain biking has increased significantly across the nation, which is also reflected in the continual growth in membership of Mountain Bike Australia (MTBA).

The ACT's extensive trail network offers residents and visitors outstanding mountain biking opportunities. For residents, the trail network provides exceptional opportunities for cyclists of all skills and abilities and is used by many to commute to the city centre and for recreational riding on the weekend.

Canberra has an established reputation for mountain biking for visitors with interstate riders spending around \$30 million each year in the Territory. The unique combination of high-quality trails, natural scenery, world class attractions, quality food and drink, and vibrant cycling culture sets Canberra apart from other mountain bike destinations in Australia. Its proximity to significant source markets such as Sydney and regional NSW and the attraction of the city to domestic and international visitors presents a significant opportunity for growth.

Most recently, during the Covid 19 Pandemic MTBA reported an increase in recreational membership particularly from 'first time' members. Bike sales also increased significantly during the pandemic, and land managers have reported increased use of mountain bike trails across the ACT.

Many destinations throughout Australia and New Zealand are experiencing the benefits of mountain bike tourism and recognise the

potential benefits for their communities and visitor economies.

As a result, there is a groundswell of effort being put into developing purpose-built trails across Australia. Substantial investment is occurring in mountain bike trails across regional NSW, including areas close to the ACT such as the Snowy Mountains and Far South Coast regions.

## ABOUT THIS REPORT

This report provides an integrated and realistic approach for the ACT Government and its stakeholders to invest in and develop mountain biking opportunities in a way that supports the aspirations of Canberra's mountain biking community and attracts domestic and international visitors. It aims to establish the ACT as the Mountain Bike Capital of Australia offering a superior trail network with outstanding experiences for visitors. It seeks to:

- Adopt a strategic and coordinated approach to trail planning, management and maintenance through key stakeholder collaboration and prioritised and targeted investment.
- Develop, upgrade and maintain a network of high-quality trails and facilities that deliver outstanding experiences to a wide range of trail users.
- Capitalise on the opportunities presented by a well-designed trails network for health, environmental, cultural, economic and liveability benefits.
- Encourage strong local community and visitor participation through effective promotion and marketing of the ACT's trails.

Investment in the trail network and associated infrastructure as recommended in this report will provide a major tourism and recreational product of national significance, capable of generating new and complementary tourism investment and contributing to tourism and economic growth in the ACT.



## CANBERRA'S CURRENT MOUNTAIN BIKE OFFERING

There are several factors that need to be considered to establish the ACT as a superior mountain bike destination. The highest priority is establishing a high-quality trail network which includes enough trails that are accessible for all skill levels combined with an outstanding experience both on and off trail.

Stromlo Forest Park is the ACT's only purpose-built mountain bike park and the most popular trail hub for visitors to Canberra. While there has been significant investment in the trail network since the multi-use recreational sporting facility was established in 2007, further investment is needed to ensure it maintains its status as the Territory's premier mountain bike destination. Most of Canberra's other mountain bike trails are located within plantation forests scattered across the ACT. The trails in these areas are planned, constructed, and maintained by volunteers and are susceptible to harvesting activities which compromises the quality and quantity of trails available.

A review of the ACT's mountain bike trails and infrastructure indicates that:

- The city's natural landscape, proximity of trails to the CBD and other attractions provides residents and visitors with riding opportunities that are not found elsewhere in Australia.
- The trails are important venues for mountain bike club activities and events. Further investment in the trail network will generate interest from national and international event organisers.
- Trails are located near attractions, restaurants, cafes and accommodation making them attractive to residents and visitors to the ACT.
- The existing network is sufficiently diverse, and the quality of trails is moderate to high.
- The trail network lacks 'hero' or aspirational trails that make it a compelling destination

for intrastate and interstate riders when compared to other destinations in NSW and elsewhere.

- Consistent trail standards, high quality trailhead facilities and trail improvements are required.
- The lack of a co-ordinated approach to the development of mountain biking, trail maintenance and marketing is limiting the potential of the ACT to become the Mountain Bike Capital of Australia.

## FURTHER INVESTMENT IS CRITICAL

Further investment is essential for the ACT to remain competitive as a mountain bike destination. Investment is required in the following areas:

- High-quality trails that provide for a minimum of two to three days riding including new trails that provide elevation and technical challenge.
- Supporting infrastructure and services at all existing trail hubs to support residents, visitors and event participants.
- Coordinated marketing and information about the trail network.
- Effective governance and management to increase efficiency and effectiveness of the volunteer effort, establish Canberra as the mountain bike capital and attract national and international events.

## PRIORITIES FOR INVESTMENT

Stakeholder and community consultation undertaken throughout the development of this report confirmed that to establish Canberra as the Mountain Biking Capital of Australia investment in new trails in appropriate locations is a priority.

The areas that offer the best potential for the development of new trails are:

- the area between Stromlo Forest Park and the Cotter Recreation Reserve
- the Cotter Recreation Area
- the Blue Range Area, Uriarra Forest.

These areas offer significant potential for trail-based recreation and proximity to the city and suburbs. Stromlo Forest Park will act as the 'gateway' to these new trails offering high quality infrastructure, shuttle services and an event staging area.

Users of these trails will be able to access existing infrastructure such as toilets and camping areas with the Cotter Recreation area.

These trails will appeal to visitors to the Territory and contribute to the health and wellbeing of the Canberra community by providing additional recreation opportunities.

Development of the trails will be subject to environmental and heritage impact assessments and will be planned and constructed to ensure sensitive siting, design and protection of each area's important values.

Other recommendations in this report include:

- A phased and prioritised approach to trail development and supporting infrastructure for trail networks identified as leading and supporting trail hubs.
- The preparation of strategic plans that recognise both harvesting and trail development activities in plantation forests. These plans will aim to protect the existing trail network and provide certainty for ongoing investment.
- A consistent approach to mountain bike direction and safety signage across all mountain bike hubs.
- Develop a Mountain Bike Capital of Australia brand as part of the CBR Cycle Tourism marketing strategy.
- Establish a central information portal (website and apps) providing comprehensive information on mountain biking in the ACT.
- Attract national and international mountain bike events as part of the 2025 Major Events Strategy.
- Establish an effective governance model to support the development of mountain biking in the ACT, manage risk and safety and to coordinate the implementation of this report.
- Pursue IMBA Ride Centre status for the ACT.



## THE BENEFITS OF INVESTING IN CANBERRA'S MOUNTAIN BIKE TRAILS

### ECONOMIC

#### INCREASED ECONOMIC ACTIVITY:

- The value that expenditure on mountain bike infrastructure and increased visitor expenditure adds to the regional and state economy.

#### EMPLOYMENT:

- The number of people employed because of tourism to the ACT.

#### VOLUNTEERS:

- The value of the contribution of volunteers through the mountain bike clubs.

#### INCREASED VISITATION:

The economic benefit of tourism generated by trail infrastructure and events.

### HEALTH

#### PERSONAL HEALTH BENEFITS:

- The benefits derived by individual participants through decreases in their risk of developing chronic diseases and a reduction in the severity of mental illness because of being physically active.

#### HEALTH SYSTEM BENEFITS:

- The savings to the health system because of improved health of residents.

#### HEALTHY LIFESTYLES:

The popularity of mountain bike riding with young families provides role-modelling of healthy lifestyles.

### SOCIAL

#### GREEN SPACE BENEFIT:

- Trails in green space generates numerous benefits for users as well as the wider community.

#### SOCIAL INCLUSION:

- Mountain biking involves different sectors of the community and can improve social inclusion.

#### COMMUNITY PRIDE:

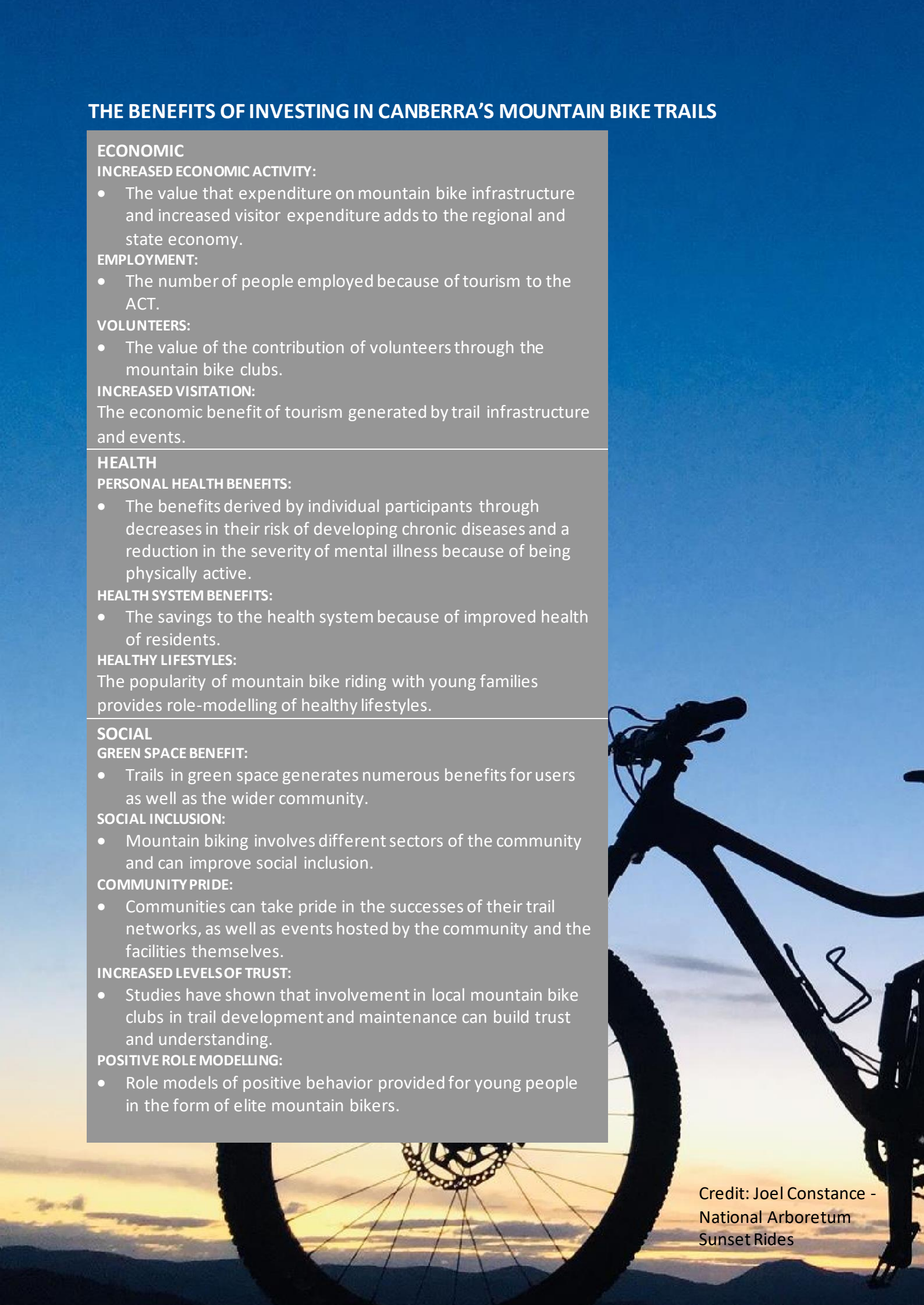
- Communities can take pride in the successes of their trail networks, as well as events hosted by the community and the facilities themselves.

#### INCREASED LEVELS OF TRUST:

- Studies have shown that involvement in local mountain bike clubs in trail development and maintenance can build trust and understanding.

#### POSITIVE ROLE MODELLING:

- Role models of positive behavior provided for young people in the form of elite mountain bikers.

A silhouette of a mountain bike is shown against a sunset sky. The bike is positioned on the right side of the frame, with its handlebars, frame, and front wheel visible. The background is a gradient of blue and orange, with a bright sun setting behind a range of mountains in the distance. The overall mood is serene and active.

Credit: Joel Constance -  
National Arboretum  
Sunset Rides





Credit: Andrew Buesnel - Spring sunrise on Stromlo's singletrack



# 1 Introduction

This section provides an overview of the aims and objectives of the Canberra Mountain Bike Report.

## 1.1 BACKGROUND

Mountain biking is a rapidly growing leisure and tourism activity across Australia and the world. It involves riding a purpose-built mountain bike on specially constructed mountain bike trails (often in bike parks or trail networks), on other off-road trails such as management trails and shared use paths or a combination of each. The activity appeals to a range of users from beginners and family groups, to more adventurous cross-country and downhill riders.

Stromlo Forest Park is the ACT's only purpose-built mountain bike park offering around 44km of high-quality cross-country trails, a skills park, a four-cross track, a World Cup level downhill course and support facilities (including toilets, changing rooms, water, and car parking).

Most of the ACT's mountain bike trails are in plantation forests. These single track and shared-use trails provide for a variety of mountain bike experiences to cater for riders of various abilities and interests.

The ACT's national parks and nature reserves also provide for mountain biking on management trails and shared use trails. Mountain biking on walking tracks is not permitted.

## 1.2 AIMS

This report is intended to provide an integrated and realistic approach for the ACT Government and its stakeholders to invest in and develop mountain biking opportunities in a way that supports local cyclists and attracts mountain biking visitors to provide social and economic benefits to the community. It identifies a range of priority projects that offer the greatest potential to achieve these aims.

It aims to:

1. Strengthen Canberra's position as an international mountain bike destination.
2. Increase the volume, length of stay and expenditure of visitors who participate in mountain biking while in the ACT.
3. Ensure sustainable development and management of the mountain bike trail network.

This report:

- prioritises planning, construction and management for existing and future trails as well as supporting infrastructure that will cater for a variety of riding styles and abilities
- provides guidance for the future coordination and governance of the trail network recognising the various land managers, volunteer and community groups involved in the management of the ACT's existing trail network
- acknowledges the importance of the CBR Cycle Tourism Strategy to embed cycle friendly services, marketing and promotion within the visitor economy; and create opportunities for local business to support sustainable mountain bike tourism
- supports the business case for investment in trail planning, development and management in the ACT.

Figure 1. The Canberra Mountain Bike Strategy





## 1.3 METHODOLOGY

The Canberra Mountain Bike Report was developed in four stages as outlined below.

### Literature Review

Plans and strategies relating to economic development, tourism and mountain bike trail activities relevant to the ACT and region were reviewed to identify infrastructure developments and other opportunities relating to mountain biking.

### Site Analysis

The consultants performed on-ground audits of existing trails and potential locations, including assessment of associated infrastructure and marketing. This included an assessment of trail demand and comparison to current supply.

### Stakeholder Consultation

A range of stakeholders including local mountain bike riders, bike clubs, ACT Government representatives, local businesses, event organisers and tour operators and other community members were consulted. The primary focus of consultation was to gather information relating to the existing trail network and potential opportunities.

### Gap Analysis, Constraint Definition and Opportunity Planning

This stage involved identifying Canberra's mountain bike offering, opportunities and social, cultural, environmental and physical constraints including land tenure and zoning.

### Assessment of Development Opportunities and Report Preparation

The final stage of the project involved compiling the findings from the previous stages of the project into a draft report for consideration and discussion with stakeholders and the community.

## 1.4 REPORT STRUCTURE

The remainder of this report is presented in ten sections:

---

### SECTION 2. Strategic Context

Provides an overview of the strategic context for the development of mountain bike tourism in Canberra

---

### SECTION 3. The Mountain Bike Tourism Market

Presents an overview of the international and domestic tourism mountain bike market

---

### SECTION 4. The Characteristics of Mountain Bikers

Provides a summary of the characteristics of mountain bikers and their preferences

---

### SECTION 5. What Makes A Successful Mountain Bike Destination?

Presents an overview of the characteristics of successful mountain biking destinations around the world

---

### SECTION 6. Canberra as a Mountain Bike Destination

Provides an assessment of Canberra's mountain bike offering

---

### SECTION 7. Investing in New Trails - Potential Locations

Presents the preliminary concepts for new trail development in Canberra

---

### SECTION 8. The Investment Strategy

Presents the actions required for Canberra to become an international mountain bike destination

---

### SECTION 9. A Sustainable Management Model for the ACT

Provides a discussion on trail management and governance

---

### SECTION 10. Benefits of Investment

Outlines the benefits of investment in establishing Canberra as an international mountain bike destination

---

### SECTION 11. Conclusion

---

Figure 2. A snapshot of tourism in the ACT

# TOURISM IN THE ACT

The ACT tourism industry has generated more than a quarter of all new jobs created in the ACT, leading Australia in terms of tourism job increases and economic contribution

YEAR ENDING MARCH 2019



## GROWTH

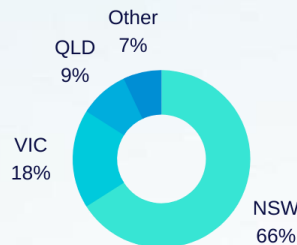
Tourism generated 19,300 jobs, an increase of 1,700 new jobs from the previous year. The result, a growth of

**↑9.2%**

from the previous year. The highest growth in tourism employment nationally



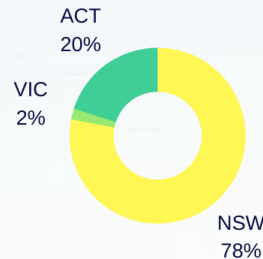
## TOP 3 MARKETS (DOM O/N)



## AVERAGE SPEND PER NIGHT

**\$252 Dom O/N**  
**\$106 Int**  
**\$133 Dom Day**

## TOP 3 MARKETS (DOM DAY)



## PURPOSE OF VISIT (DOM O/N)

**34% VFR**  
**31% Business**  
**29% Holiday**

## TOP 3 MARKETS (INT VISITORS)

**20% CHINA**  
**8% UK**  
**8% USA**

## 2020 GOAL

\$2.5 billion generated from International & Domestic Overnight Expenditure



Sources: <https://tourism.act.gov.au/insights/research/> <https://tourism.act.gov.au/2019/08/tourism-jobs-and-economic-contribution-at-record-level/>



## 2 Strategic Context

This section provides an overview of the strategic context for the development of mountain bike tourism in Canberra.

### 2.1 RELEVANT STRATEGIES

Mountain biking supports many of the ACT Government's strategic objectives relating to tourism, economic development, conservation, sport and recreation and active lifestyles.

### 2.2 STATEMENT OF AMBITION

The ACT Government's vision for Canberra is to be one of the world's most liveable and competitive cities<sup>1</sup>. Tourism is recognised as an important sector supporting this vision.

### 2.3 CANBERRA'S VISITOR ECONOMY

The ACT Tourism Strategy: *Growing the Visitor Economy 2014-20* outlines a series of actions to achieve tourism growth including developing experiences in the areas of food and wine, arts and culture, nature and outdoor adventure, indigenous culture as well as events and festivals.

Visit Canberra marketing activities are focussed on domestic visitors (priority markets are regional NSW and Sydney metropolitan area and to a lesser extent Brisbane and Melbourne) and international visitors (priority markets are Singapore, Malaysia, India, China, Hong Kong, UK, USA, and New Zealand). A snapshot of the importance of tourism to the ACT economy is presented in Figure 2.

### 2.4 CBR CYCLE TOURISM STRATEGY

A clear competitive advantage for the ACT is the ability to connect its broader experience offer with cycling opportunities. This advantage is recognised in the CBR Cycle Tourism Strategy.

The CBR Cycle Tourism Strategy prioritises the projects that have the greatest potential to grow the visitor economy and the profile of Canberra as a cycle tourism destination. The strategy's ambition is to establish Canberra and the region as Australia's cycling destination of choice. Its goals are to:

- create a positive and collaborative culture for cycling
- strengthen the perception of the ACT and region as Australia's cycling destination of choice
- increase visitation to the ACT and the region, contributing to the diversification of the ACT economy
- enhance the sustainability and liveability of the ACT and the region for local communities.

The strategy suggests that by achieving a 1.1% growth in visitation each year through cycle tourism, the cumulative economic benefit is likely to exceed \$400 million by 2030.

To achieve this goal the actions in the report are prioritised into four themes:

1. Inclusiveness and accessibility — ensuring the destination is attractive to a wide audience and different target markets.
2. Diversity — delivering cycling options to suit a wide range of experience levels and interests.
3. Proximity — integrating the cycling experience within the broader visitor experience of the ACT and the surrounding region.
4. Marketing — building awareness of the cycling experiences offered by the ACT and the surrounding region.

---

<sup>1</sup> Canberra's International Engagement Strategy, Office for International Engagement, ACT Government 2016



The strategy recognises the need for the ongoing development of mountain biking to attract more visitors, increase the average length of stay and provide more opportunities for higher-yield markets.

## 2.5 ACT CONSERVATION STRATEGY 2013 - 2023

The ACT has established a comprehensive reserve network protecting areas of high conservation value. These areas also provide a wide range of outdoor recreation and tourism opportunities. The ACT Conservation Strategy 2013-2023 helps guide future planning of the Territory's open spaces, rural areas, urban areas, riverine corridors, and nature reserves, and guide investment of funding and resources in nature conservation. The strategy also improves the opportunities for ACT residents to enjoy parks, reserves and open space, as places for recreation, amenity, self-renewal and education. Existing Plans of Management define appropriate use for reserves in the ACT.

Canberra Nature Park is made up of 37 nature reserves, with environments ranging from forested hills to some of the best examples of lowland native grassland and critically endangered Yellow Box-Red Gum Grassy Woodland left in Australia. Weed and exotic animal invasion, fire management and recreation pressures are significant issues for Canberra Nature Park. Unsanctioned mountain bike trails in nature reserves are an ongoing issue for Canberra's nature reserves as they have the potential to cause erosion and other impacts.

## 2.6 HEALTHY AND ACTIVE LIVING STRATEGY

Mountain biking provides an accessible and inclusive form of sport and recreation. It provides opportunities for all levels of rider from novice to elite, with no limit on age or gender. Whilst often perceived to be physically demanding, this is relative to the style adopted, the track utilised and the objectives of the rider.

The ACT Government's Healthy and Active Living Goals aim to:

- To increase participation in competitive, non-competitive, social sport and active recreation activities at all levels.
- To provide opportunities for achieving excellence in sporting performance.
- To ensure access to quality and sustainable infrastructure for the delivery of these activities.

Actions include establishing Canberra as the National Sporting Capital and to enhance established ACT sporting precincts including Lyneham, Bruce, Stromlo Forest Park and Manuka.

## 2.7 STAKEHOLDER PERSPECTIVES

Consultation with stakeholders and the community has been an integral component of the development of this report. The following mechanisms were used to encourage community and stakeholder input:

- Industry Project Reference Group
- Community submissions and workshops
- Stakeholder consultation (land managers and other ACT Government representatives).

### **Industry/Project Reference Group**

An Industry Project Reference Group was established at the commencement of the project to advise ACT Parks and Conservation Service on the development of the report.

The Project Reference Group met three times during the development of the draft plan and discussed opportunities and constraints associated mountain bike tourism in the ACT.

### **Community Input - Submissions**

Canberra residents were invited to contribute to the development of the report via the ACT Government's Your Say website. A total of 160 submissions were received. These submissions were analysed and informed the development of the draft report. Residents were invited to comment on the draft report and a total of 126 submissions were received. Most submissions supported the concepts in the draft report. A small number of submissions expressed concerns regarding the potential impact of new trail development on areas used by horse riders and on the Uriarra Village community. These concerns have been considered and addressed in the final report.

### **Community Workshops**

Three workshops were held with the Canberra community to discuss issues and opportunities associated with mountain biking in Canberra. Over 100 participants attended. The workshop outcomes informed the development of the draft report. The workshop outcomes are presented in Appendix A.

### **Issues and Opportunities**

The various mechanisms allowed industry representatives, land managers and users to guide the report's outcomes. The consultation yielded the following advice, issues and opportunities:

- The ACT needs to capitalise on the growing mountain biking market.
- Increasing recreation, social, competitive and tourism is placing pressure on Stromlo Forest Park.

- There is a need to create more diversity in trail types and classifications across the ACT.
- Canberra needs trails with elevation and distinctive experiences.
- Marketing of mountain biking in Canberra lacks coordination.
- Limited funding for trail development and maintenance is creating an unsustainable reliance on volunteer groups.
- There is a strong mountain bike culture in the ACT capable of assisting with the development and management of mountain biking.
- Sustainably developed and managed trails are important to protect environmental and cultural values.
- Biodiversity is a critical consideration in the planning and development of new trails.
- Outcomes should be triple bottom line: Social and economic community benefit and reduced environmental risk.
- There is a need to foster youth participation and to create accessible family friendly trails and classifications to allow incremental ability progression.
- Trail quality and experience was identified as the most important attribute of trails followed by unique environment and accessibility.
- There is a preference for trails in scenic locations, with a mix of highly accessible and more remote but unique environments.
- There is a general lack of trail information, online mapping, signage, trail related facilities at all trail hubs.
- There is a need to manage unsanctioned trail development.
- Areas with significant elevation will improve Canberra's offering.
- Trail development should focus on longevity. Trails in plantation forests are at risk of harvesting activities.







# 3 The Mountain Bike Tourism Market

This section presents an overview of the size of the mountain biking market.

## 3.1 SIZE OF THE CYCLE TOURISM MARKET

While international research on the uptake and impact of mountain bike tourism has occurred, there is limited Australian based research focussing on mountain biking specifically. Much of the studies done in the Australian context have been from the broader 'cycling' or 'adventure' tourism theme. The following summary presents an overview of the existing international and national data.

Research indicates that cycling tourism is on the rise across the world, with an increasing number of adventure tourists embarking on both road and mountain biking tours.<sup>2</sup> The United Nations World Tourism Organisation (UNWTO) identified cycle tourism as a growth adventure tourism activity worldwide in their Global Report on Adventure Tourism 2013.<sup>3</sup>

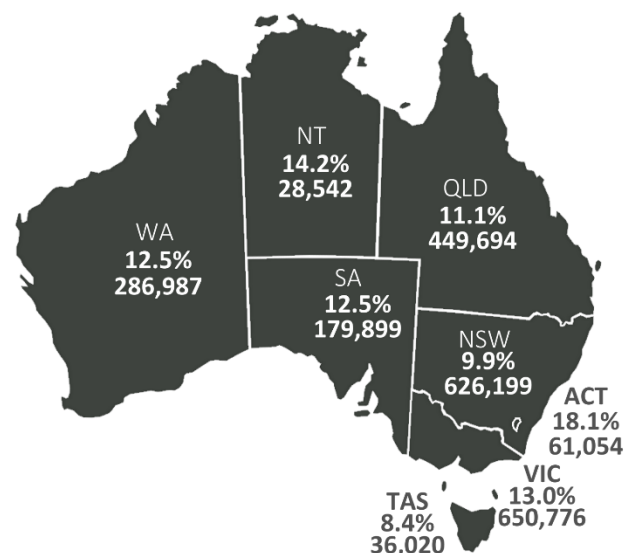
## 3.2 PARTICIPATION

While it is difficult to estimate the size of the cycle tourism market in Australia, data on participation rates provides some insight. Mountain biking continues to grow as one of the fastest and most popular family friendly lifestyle activities in Australia. Nationally it is estimated that 2.3 million adults participate in cycling. The ACT ranks number one for participation rates per capita when compared to other States and Territories<sup>4</sup> (see Figure 3).

Mountain Bike Australia's (MTBA) database exceeds 70,000 individual members and over the last four years, MTBA's financial membership has grown by 59%, with nine new clubs established in 2018, taking total club representation across Australia to 168. Around one third of clubs are based in NSW.

Bicycle Industries Australia indicates that approximately 1.3 million bicycles were imported into Australia in 2018, with 26% being identified as mountain bikes (approximately 338,000). Approximately 70% of the bikes sold in Australia are mountain bikes.

**Figure 3. National cycling participation rates per State/ Territory<sup>5</sup>**



<sup>2</sup> United National World Tourism Organization 2014. Global Report on Adventure Tourism. Madrid: UNWTO.

<sup>3</sup> United National World Tourism Organization (2013), Global Report on Adventure Tourism, AM Reports: Volume nine, UNWTO, Madrid

<sup>4</sup> Ausplay National Sports Participation Survey 2018 for the period January-December 2018,

<sup>5</sup> Ausplay Cycling - State of Play Report 2018

### 3.3 CYCLE TOURISM IN AUSTRALIA

Tourism Research Australia conducted research into the cycle tourism market in Australia in 2015. This research showed that since 2013, there has been average growth of 6% per annum in the day trip cycle market, 8% growth in overnight cycle market and 9% in international cycle market (all cycling types).

Of those surveyed who advised they had participated in cycling, 11% had taken a holiday, short break or day trip involving a cycling experience in the last two years. Two thirds of these people said the cycling experience was their main reason for travelling, with 12% advising they had participated in “a cycle tour where you camp or stay overnight along the way”. Many respondents, including some who had not previously taken holidays involving cycling, would consider cycling experiences in the future.

Approximately 3.5 million visitors travelling in Australia participate in cycling activities/events (either as a participant or as a spectator) generating just under 19 million nights across Australia.<sup>6</sup> Around 25% of these visitors participate in mountain biking (871,000).

### 3.4 MOUNTAIN BIKE TOURISM TO THE ACT

Around 129,000 visitors participated in cycling while visiting the ACT (either as a participant or as a spectator) in the year ending March 2019.<sup>7</sup> Collectively they spent 376,000 nights in the ACT.

While it is unknown how many of these cycling visitors participate in mountain biking, consultation with commercial operators suggests that it is at least 50%. This suggests that at least 64,000 overnight domestic visitors ride the mountain bike trail network each year, spending around \$30 million in Canberra each year<sup>8</sup>.

Most mountain bike visitors to the ACT comprise individuals or groups travelling from Sydney for weekend trips or specific events, attracted by the accessibility of Canberra and the variety of experiences it provides. This is consistent with research undertaken for Stromlo Forest Park and Majura Pines where many visitors are from interstate.

---

It is estimated that overnight domestic mountain bikers spend around \$30 million each year while staying in the ACT.

---

<sup>6</sup> National Visitor Survey March 2019

<sup>7</sup> Ibid

<sup>8</sup> Estimates based on the National Visitor Survey March 2019



## Profile of average mountain bikers<sup>9</sup>

Why are mountain bikers important for tourism in the ACT?



---

They are likely to go on 1-4 mountain biking holidays per year, generally of 1-2 nights duration and with 2-5 companions and spend more per trip than other visitors

---

They are prepared to pay for the use of a commercial shuttle service

---

They are likely to visit bars, cafes or restaurants in conjunction with a ride

---

They are prepared to travel greater than 4 hours to go mountain biking on a weekend

---

They would be likely to stay in local accommodation when visiting the proposed trail network

---



---

<sup>9</sup> Data drawn from Ausplay Cycling – State of Play Report 2018 — [www.austroroads.com.au/road-operations/bicycles/national-cycling-strategy](http://www.austroroads.com.au/road-operations/bicycles/national-cycling-strategy), Mountain Bike Australia Annual Report 2017/18, Mountain Bike Australia Participation/Performance Snapshot Nov 2017, Tourism Research Australia International Visitor Survey

### 3.5 FORECAST GROWTH IN MOUNTAIN BIKING IN THE ACT AND REGION

The latest population projections suggest Canberra will be home to half a million people by 2028. By 2058, this will increase to 700,000 people, which is almost double the current population. The growth in population will be most notable in Sydney which is forecast to grow by an additional 1.3 million people, increasing from 5.1 million to 6.4 million by 2027. Sydney is a significant domestic source market for tourism in the ACT, and a potential growth market for cycle tourism.

Domestic tourism to the ACT is forecast to grow by 3.5 % per annum to 2028. The number of international visitor nights is estimated to grow by 5.1% per annum over the same period.

Importantly, the main purpose of travel for many visitors to Canberra is to visit friends and relatives. Resident mountain bikers are ‘ambassadors’ for Canberra. They have the potential to influence their friends and relatives to ride in Canberra while visiting and leverage potential growth in this market.

### 3.6 THE CHANGING NATURE OF MOUNTAIN BIKING

Electric and power assisted bikes represent one of the fastest growing segments of the bike industry as they allow riders to extend their cycling distances. Electric bikes help in overcoming hilly terrain or a lack of fitness, can assist in rehabilitation after injury or illness and are a cost effective and green transport solution.

In 2015, just over 40 million e-bikes were sold worldwide, of which more than 90% were sold in China, 5% in Europe, and 0.7% in USA.<sup>10</sup> This exponential growth, has been reiterated by global research company Mordor Intelligence who have estimated that by 2028, one in two bicycles purchased will be an e-bike. ‘Specialized’ are a global bicycle company, shipping bikes across the world. They are experiencing a 150% year on year growth in e-bike sales, with 80% of these being mountain bikes. From a sales perspective, Specialized note that the Australian market has been initially conservative about the uptake of e-bikes compared with New Zealand. This could be due to the lack of existing infrastructure for e-bikes in Australia and some negativity about the use of e-bikes and the slower limited speed of 25km/hr (New Zealand permits 32km/hr). Despite this, the Australian market is growing in e-bike use and interest, with Specialized forecasting that Australian e-bike sales will overtake New Zealand sales in 2020.<sup>11</sup>

---

<sup>10</sup> Monzano E. et al., The Electric Bicycle – Worldwide Research Trends 2018

<sup>11</sup> Sustainable Trails Conference 2019, E-bike Data, Specialized



### 3.7 OTHER DESTINATIONS

Over the last ten years mountain bike trail networks and bike parks have been developing across Australia and attracting local, domestic and international visitors. For example, Tasmania, Northern Territory and all other States are currently investing in mountain bike tourism. Investment is also occurring across regional NSW, including the Snowy Mountains region. These destinations have been investing in trail infrastructure, support facilities and management as well as developing the wider tourism/visitor experience both on and off trail.

International destinations such as Sentosa Singapore, Rotorua and Queenstown in New Zealand continue to develop their trail infrastructure through a combination of private and public sector investment. Infrastructure has included gondola rides to the summit and gravity-based adventure rides. The most notable examples are provided in the Case Studies in Appendix B.

This national and international groundswell of effort being put into developing trails reflects the growing popularity of mountain biking.

Stakeholders have suggested that investment in the ACT's trail network has not been keeping up with trail demand and competition from other States and Territories in recent years. This has impacted on Canberra's potential status as a destination and is reducing its market share of mountain bike tourism.







# 4 The Characteristics of Mountain Bikers

This section describes the characteristics and preferences of mountain bikers.

The size, activity patterns and needs of the Australian mountain biking market can be broadly divided into two segments:

- core riders (technical, endurance and all-rounders)
- non-core riders (leisure riders)

Mountain bikers are generally categorised in either the riding genre (all-mountain, cross country, downhill) and/or by their ability (e.g. beginner, intermediate, advanced).

**Mountain bike riders can be broadly divided into core and non-core riders:**



### **Non-core Mountain Bikers:**

- Complete novices
- Road bikers that occasionally ride
- Families seeking safe enjoyable places to ride away from cars
- School groups (often guided by tour operators)
- Off-road bike tourers
- With increased skill, may eventuate into Core Mountain Bikers.

A number of mountain bike riding styles have evolved since the sport began in the 1980's. Cross-country riding is the most popular style of riding due to its relative ease of participation, however there has been significant growth in recent years in the gravity riding styles such as Gravity Enduro and also the jump and stunt focussed styles such as Freeride and Dirt Jumping.



### **Core Mountain Bikers:**

- High levels of expenditure on gear and equipment
- High amount of time spent mountain bike riding
- High willingness to travel to go mountain biking
- High likelihood of participating in competitive events.

The largest segments are Leisure (non-core) riders consisting of mainly families; Endurance (core) riders who travel to destinations that offer quality experiences and; Downhill riders who seek iconic adventurous experiences. The Table 1 summarises the styles of mountain biking. The descriptions provide an indication of skill levels, riding frequency, preferred trail types and the approximate market size of each rider type and importance of the market for the ACT.

**Table 1. Mountain Biking Markets**

MARKET	CHARACTERISTICS	IMPORTANCE	SIZE OF MARKET
<b>Leisure (non-core)</b>	<ul style="list-style-type: none"> <li>Active families are attracted to a destination that offers happy, healthy, sustainable and safe family adventure.</li> <li>There is a strong trend in tourism driven by the motivation of many city-living families to escape the urban environment.</li> <li>They seek opportunities for their children to experience the outdoors and self-select a break from screen time by providing a fun and exciting alternative.</li> <li>This increasingly includes short breaks. Depending on skill levels they may be drawn to easier but varied terrain, and safe rides of up to 8-35km per day (depending on child age and ability).</li> <li>They like points of interest, views, places to rest and break up the journey, and keep children interested in their surroundings. Support services (equipment, shuttle) and complementary visitor experiences may be of interest to this group.</li> </ul>	High	Large
<b>Endurance trail rider (core)</b>	<ul style="list-style-type: none"> <li>In the age group of 22–55 years, predominantly male with growth in female and higher income groups.</li> <li>They have a strong interest in challenging terrain, steep climbs and descents.</li> <li>They will ride long distances, up to 75km/day, and are compatible with multi-day experiences.</li> <li>They may complete more than one segment of a multi-day ride per day, depending on conditions.</li> <li>This group will travel to destinations that offer quality experiences and epic rated rides and they will spend on riding experiences and equipment.</li> </ul>	High	Moderate
<b>Downhill specialists (core)</b>	<ul style="list-style-type: none"> <li>Destination Mountain Bikers.</li> <li>Younger, mainly male.</li> <li>High socio-economic group, interest in travel to ‘iconic’ experiences which may be combined with other mountain biking experiences in the region.</li> <li>Can walk, bike or fly into start points.</li> <li>Strong desire for excitement, challenge, skill development, speed and sense of adventure.</li> <li>Mix of competitive and non-competitive elements.</li> </ul>	High	Moderate



MARKET	CHARACTERISTICS	IMPORTANCE	SIZE OF MARKET
	<ul style="list-style-type: none"> <li>Downhill tracks of varying difficulty. Sweeping corners. Mix of straight runs, switchbacks and jumps.</li> </ul>		
<b>Technical skills and trick riders (core)</b>	<ul style="list-style-type: none"> <li>Destination Mountain Bikers.</li> <li>Young (22 – 40 years), predominantly male, and high expenditure on equipment and experiences.</li> <li>Challenge and skill development are strongest motivators.</li> <li>Prefer natural and built obstacles, downhill sections.</li> <li>Usually seek 'Bike Park' facilities where obstacles designed for trick riding</li> <li>Extensive built structures with mix of difficulty. Trail networks at a single destination preferred.</li> <li>Depends on suitability of trail and challenge available.</li> </ul>	High	Small
<b>Event participants (core)</b>	<ul style="list-style-type: none"> <li>Destination Mountain bikers.</li> <li>Young (22 – 50 years).</li> <li>Regular participants/travellers for mountain biking experiences.</li> <li>Higher socio-economic group, high expenditure as part of travel.</li> <li>Organised event context, offering either competitive (traditional market) or non-competitive gatherings, set -around a style of riding, a set distance, or a theme (such as a night ride).</li> <li>Social element (shared across competitive and non-competitive events).</li> <li>High quality of ride experience – groomed trails, numerous trail features, rewarding landscape features (such as viewpoints).</li> <li>Trails to be the 'best of the best'.</li> <li>Courses designed for maximum user experience/wow factor (no 'dead wood' distances if possible).</li> <li>Ideally event offering 'all group' services according to varying levels of skill within a social or club group or a family unit.</li> <li>Peripheral entertainment/visitor offerings (food, other attractions, entertainment, accommodation).</li> <li>High level of on-course catering (feed stations, first aid, marshals).</li> <li>High level of communication/information before and during event.</li> <li>Will respond to event offering in the region. Likely to be return competitors if events are successful.</li> <li>May remain in-region to experience other ride opportunities available.</li> </ul>	High	Small

MARKET	CHARACTERISTICS	IMPORTANCE	SIZE OF MARKET
<b>Adventure cycle touring (non-core)</b>	<ul style="list-style-type: none"> <li>• Expedition touring involves cyclists attempting extended travel in remote regions often off the beaten track.</li> <li>• Often self-sufficient, equipped with racks, panniers, and heavy-duty tires and purpose-built bicycles built to cope with long-haul touring on tracks and unsealed roads. Often part of an extended journey.</li> <li>• Focusing on freedom of travel and efficiency over varied surfaces, cyclists often adopt an ultralight camping approach and carry their own minimal gear may remain in the area for extended time often (bike packers).</li> <li>• Compatible with multi-day experience depending on trail design/construction and maintenance.</li> </ul>	High	Small

#### 4.1 THE NEEDS OF DOMESTIC AND INTERNATIONAL CYCLE TOURISTS

Local, domestic and international visitors all have different needs and expectations as outlined in Table 2.

**Table 2. Needs of local, domestic and international visitors**

WHO	NEEDS
<b>Canberra Residents</b>	
<p>Children and families seeking a safe entry level or skills development experience. Riders in the young adult to middle age groups. Experienced local riders who have ridden for many years in the region, and who continue to contribute to the trail network through building, maintenance and other activities</p>	<ul style="list-style-type: none"> <li>• Trails and bike parks accessible from population centres and together offering a range of trail types.</li> <li>• Inter-connected trail networks offering a range of difficulty levels and technical challenges. Ideally offering at least a day's riding.</li> <li>• Skills parks and technical trails.</li> <li>• Participative and competitive events.</li> <li>• Trailheads with appropriate facilities including car parking, bike wash-down, food services, shuttle transport.</li> <li>• A range of trails accessible for shorter 1 to 4-hour rides near places of work and living. Trails generally for the local user market although will travel more broadly to trails regionally and will travel nationally for longer weekend breaks and short holidays.</li> <li>• Some feature rides that might include long descents, well designed and constructed features, outstanding scenery and other features.</li> <li>• Diversity of offerings.</li> </ul>



<b>Domestic Visitors</b>	
<p>Riders in the young adult to older age groups who may visit the region specifically to ride a trail network or bike park.</p> <p>Club members on trips.</p> <p>Schools, outdoor education and youth groups from within and near the region.</p>	<ul style="list-style-type: none"> <li>• Trail networks and bike parks that offer 2 to 3 days riding and a range of trail type and difficulty levels.</li> <li>• Iconic and challenging rides.</li> <li>• Multi day epic trail with support services to make experiences more accessible.</li> <li>• Trailheads with appropriate facilities including car parking, bike wash-down, food services, shuttle transport.</li> <li>• Bike hire and repair services.</li> <li>• Good pre-trip information and booking.</li> <li>• Engaging immersive interpretation.</li> <li>• Nearby accommodation, facilities and transport allowing for washing, storage and easy access to bikes.</li> <li>• Guided experiences that offer environmental or cultural learning, outdoor skills development, challenge and team building opportunities for schools or special interest groups.</li> </ul>

<b>WHO</b>	<b>NEEDS</b>
<b>International Visitors</b>	
<p>Mainly visitors from UK, USA, Germany, Canada, Netherlands aged from young adult to over 55s, travelling alone or with a partner.</p>	<ul style="list-style-type: none"> <li>• Iconic and challenging rides and trail journeys.</li> <li>• Outstanding trail networks and bike parks that offer 2 to 3 days riding and a range of trail type and difficulty levels.</li> <li>• Multi day epic trail with support services to make experience more accessible.</li> <li>• Trailheads with appropriate facilities including car parking, bike wash-down, food services, shuttle transport.</li> <li>• Bike hire and repair services.</li> <li>• Accommodation and food and beverage appropriate for people travelling long distances for an outstanding experience.</li> <li>• Good pre-trip information and booking.</li> <li>• Signature events.</li> </ul>

In summary, according to the International Mountain Biking Association (IMBA), mountain bikers want experiences that provide:

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





Credit: Garreth Paton - Everyone looking forward to the fun flowing trails down Stromlo and relaxing at the Handlebar Cafe at the bottom



# 5 What Makes a Successful Mountain Bike Destination?

This section presents an overview of the characteristics of the most successful mountain bike destinations around the world.

## 5.1 CHARACTERISTICS OF SUCCESSFUL MOUNTAIN BIKE DESTINATIONS

This report takes a holistic, experience-based approach to the development of mountain biking in the ACT, recognising that several factors are involved in developing a successful mountain bike destination. It is the combination of these factors that create a destination that is appealing for a range of visitors and local users. Based on the characteristics of successful mountain bike destinations these factors relate to:

- the trail infrastructure, design, support facilities and management
- the wider tourism/visitor experience offered, both on and off trail
- the needs and preferences of a destination's mountain biking markets.

Essential features of a world class mountain biking network are:

- a high quality, sustainable trail network with good signage and mapping enabling users to navigate the network easily
- diversity of trail types and styles for users of all abilities, featuring a broad range of difficulty levels with good opportunities for rider challenge and progression
- A typical split across a network is 20% beginner, 50% intermediate and 30% advanced level trails
- enough riding opportunities to fill 2 to 3 days - around 60km to 100km of trails
- a trail network that evolves over time to entice return visits

- accessibility from population or tourism centres and transport hubs
- high quality pre-trip information
- sustainable management of trails and infrastructure
- supported by a MTB-friendly local community.

Other features which add value but are not essential are:

- IMBA recognition which enhances the reputation of a mountain biking area through IMBA's global network. There are two formal mechanisms for IMBA recognition. IMBA Ride Centres are recognised by IMBA under a three-tier scheme for the outstanding range, variety and quality of the riding experience. IMBA Epic Rides are demanding rides of at least 32km in a natural setting
- provision of transport such as shuttle vehicles, chair lifts
- high standard trailhead or nearby facilities
- events which attract participants and spectators.

---

The attraction for mountain bikers is the trail network - the quality and quantity of trails, accessibility and the challenges and interest provided.

---

The off-trail experience is also important to mountain bikers who spend a proportion of their time at a destination doing other activities. Important considerations are:

- an attractive landscape, natural beauty and cultural attractions
- a range of bike-friendly accommodation options
- cafes, food, beverage and retail businesses
- supporting bike-related services
- quality commercial tours (guided and self-guided)
- community engagement and support
- strong positioning as a mountain bike destination to attract a range of mountain biking visitors.

Positioning as a distinctive mountain biking experience is important to distinguish a destination from its competitors and make it 'front of mind' among potential visitors.

This requires

- coordinated destination marketing and promotion
- a range of attractions and things to do for non-riders or visitors who engage in mountain biking as part of a wider experience.

---

Positioning as a 'distinctive mountain bike experience' is important to distinguish a destination from its competitors and make it 'front of mind' among potential visitors.

---







# 6 Canberra as a Mountain Bike Destination

This section provides an overview of Canberra’s existing mountain bike offering and assesses its potential as an international mountain bike destination.

## 6.1 OVERVIEW

The ACT’s mountain bike trails are dispersed across the ACT each with its own character and level of challenge providing considerable diversity for locals and visitors. Stromlo Forest Park (SFP) is the ACT’s only purpose-built mountain bike park, however most of Canberra’s trails are located within plantation forests. Trails in these areas are planned, constructed and maintained by volunteers. These impressive trail networks operate with the permission and oversight of the relevant land managers. Collectively they play a significant part in Canberra’s mountain bike offer for domestic and international visitors and they are important venues for mountain bike club activities and events. In addition, the Canberra Centenary Trail and the Bicentennial National Trail are multi use trails suitable for mountain biking. Table 3 presents a summary of the areas available for mountain biking in the ACT.

Canberra’s mountain bike trail network offers a combination of single track and shared trails in separate hubs. Each hub plays a significant part in Canberra’s mountain bike offering.

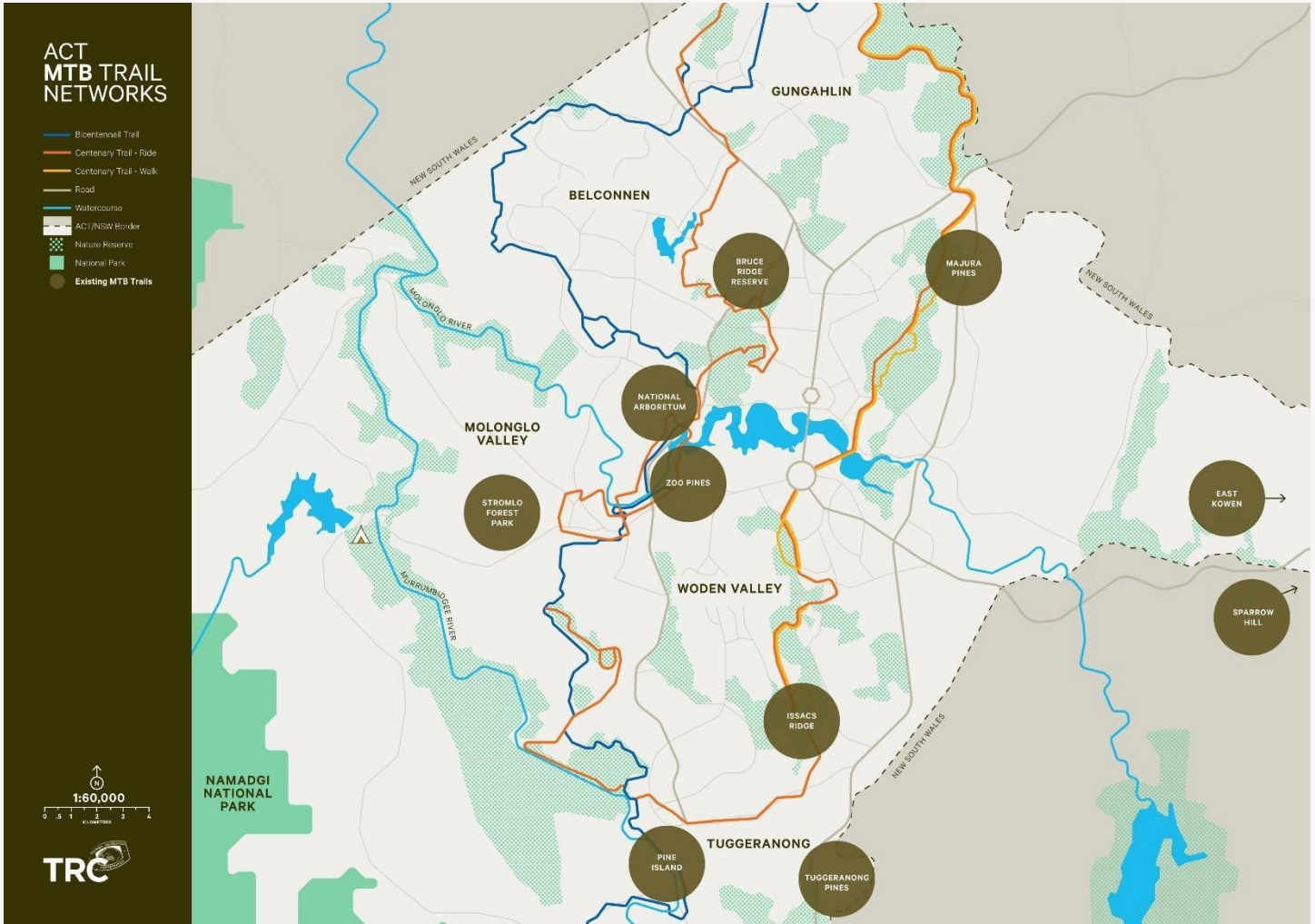
**Table 3. Mountain Bike Areas in the ACT**

LOCATION	TRAIL HUB	TYPE OF TRAIL
<b>Stromlo Forest Park</b>	Stromlo Forest Park	Dedicated single track
<b>ACT Plantation Forests</b>	Majura Pines	Single track & shared trail
	Sparrow Hill	
	East Kowen	
	Tuggeranong Pines	
	Zoo Pines	
	Isaacs Pines	
<b>Canberra Nature Park</b>	Bruce Ridge	Single track & shared trail
<b>The National Arboretum</b>	The National Arboretum	Shared trail
<b>Canberra Centenary Trail and</b>	Linear trail through the ACT	Multiple Use Trail
<b>The Bicentennial National Trail</b>	Linear trail that crosses the ACT border	Multiple Use Trail from Victoria to Queensland
<b>National Parks and Nature Reserves</b>	Tidbinbilla Nature Reserve	Management trail (bike packing and gravel riding)
	Namadgi National Park	
	Murrumbidgee River Corridor (Pine Island)	
	Other Nature Reserves	



Figure 4 illustrates the spatial distribution of these existing trail hubs, most of which are easily accessible by car from Canberra's CBD and surrounding suburbs.

**Figure 4. Location of existing trail hubs**



## 6.2 DESCRIPTION OF CANBERRA'S TRAIL HUBS

The following section provides an overview of each trail hub together with an analysis of the total trail network.

### **Stromlo Forest Park**

Stromlo Forest Park (SFP) offers around 44km of high-quality cross-country trails, a skills park, a four-cross track, a World Cup level downhill course and support facilities (including toilets, changing rooms, water, and car parking). SFP covers an area of approximately 1,200 ha around Mount Stromlo and excludes part of the summit area which is used by the Australian National University and ICON Water. The elevation of 770m is comparable to Rotorua and Queenstown in New Zealand. A commercial shuttle service is operated under licence to lift riders to the top of Mt Stromlo.

The trail network is designed to be suitable for beginners to advanced riders with most of its trails rated as green according to IMBA standards.

SFP is a shared public multi-sports facility with designated trails for off road and on road cyclists, runners, walkers, equestrian riders and several other established user groups. The park attracts over 150,000 users per annum. Of this total the majority are mountain bike riders with a large proportion visiting from outside the ACT. The trails within the park are busy in peak periods, with riders reporting that they choose to ride elsewhere at these times. As the population expands and mountain biking becomes more popular, this trend is likely to continue.

SFP is an internationally recognised venue and the location of the previous UCI Mountain Bike and Trials World Championships. The park attracts around 200 events per annum, each event attracting anywhere between 200 – 400 people. A major cycling event, the 'Sea Otter' is planned for 2020. The ACT School Championships were recently held at SFP attracting over 700 participants and spectators.

Mountain bike training programs are becoming increasingly popular particularly with school groups and these groups generally use the facility mid-week.

The park is managed by Venues Canberra and one full time manager is assigned to manage daily operations of SFP. Marketing of the venue is also undertaken by Venues Canberra.

The volcanic/igneous soils of SFP are erodible and the trails require regular maintenance. Maintenance of the trail network is undertaken by a contractor on an annual basis, at an estimated cost of around \$90,000 per annum. Trails are rebuilt or extended annually to IMBA standards. A Trail Advisory Group, made up of industry, club and other representatives, advises Venues Canberra on trail planning and maintenance activities.

### **The Stromlo Forest Park Masterplan 2016**

The Stromlo Forest Masterplan 2016 aims to diversify recreation experiences at the venue, prioritising investment on projects including the establishment of short stay accommodation. Venues Canberra has recently sought interest from investors for (i) accommodation development (ii) infrastructure and business investment partnerships.<sup>12</sup>

---

<sup>12</sup> Market Sounding, Stromlo Forest Park Accommodation and Infrastructure Investment Opportunities August 2019



## Snapshot of Visitors - Stromlo Forest Park

Market research<sup>13</sup> on visitors to Stromlo Forest Park indicates:

- Over three quarters (78%) of adult park visitors are aged 35 or over
- They are predominantly local, just over half (53%) living within 25 kilometres of the Park
- The Park receives a high volume of repeat visitors
- Visitor's household incomes are above average with over half (60%) reporting household incomes (before tax and including super) in excess of \$104,000 per year
- Summer is the most popular season for riding, however there is only marginal difference in visitation between Summer, Spring and Autumn. Winter generates fewer visitors, reducing visitation by one third
- Visitor services such as food and beverages are in high demand by visitors
- The top ten suggested improvements by visitors are:
  - Food and beverage options
  - More shade and undercover areas
  - Toilets and change rooms
  - Expanded trail network
  - Improved trail signage
  - Improved trail maintenance
  - Seal and expand carpark
  - Accommodation
  - Better website with improved maps
  - Chairlift / shuttle service
  - More water fountains
  - Bike wash

Stromlo Forest Park now offers a café and shuttle service on weekends and accommodation is being considered. A bike wash is provided.

## ACT Plantation Forests

Majura Pines, East Kowen, Sparrow Hill, Tuggeranong Pines, Isaacs Pines and Zoo Pines are managed as plantation forests. These areas contain most of the ACT's mountain bike trails which have been designed, built and maintained by volunteer groups.

Trails in these forest areas are impacted by forest harvesting activities which act as a disincentive to significant trail construction and maintenance. As a result, the quality and extent of the trails can vary significantly when forest harvesting occurs.

### Majura Pines

The Majura Pines Recreation Area contains around 22km of purpose-built single-track, built and maintained by the Majura Pines Trail Alliance. Majura Pines offers the most blue and black trails (refer Appendix D for IMBA trail classifications) within the Canberra area, followed by SFP and includes a high-quality dirt jump park. The trails are very popular receiving over 26,000 visitors per annum. 23% of visitors to Majura Pines are from interstate. The area also receives many international visitors.<sup>14</sup>

The Majura Pines remain a working forest. Periodically the forest is closed, and some trails lost to the harvesting schedule. The disruption is significant as the trail network is relatively small.

The Majura Pines Trail Alliance contribute significant volunteer support to build and maintain new trails and recover old trails following harvesting.

Majura Pines Trail Alliance have proposed the development of new trails within the Mount Majura Nature Reserve that link the summit of Mount Majura with the Majura Pines Recreation Area and to the Centenary Trail which traverses the Mount Majura Nature Reserve.

<sup>13</sup> Mt Stromlo Forest Park visitor utilisation research Stage 2 – July 2014  
Produced by Australian Survey Research

<sup>14</sup> Majura Pines Trails Alliance 2019

The Canberra Nature Park Draft Reserve Management Plan 2019 requires the development of mountain bike areas such as that in Majura Pines, which is next to a Mt Ainslie Nature Reserve, to consider likely flow-on effects for the adjacent reserve. The ACT Parks and Conservation Service do not support the development of additional trails that will impact on the Mt Majura Nature Reserve.

### **East Kowen and Sparrow Hill Plantation Forest**

The Sparrow Hill and East Kowen trail hubs are part of Kowen Plantation Forest and are located around 12km to the east of Queanbeyan. There are two riding areas with trails suitable for all abilities. East Kowen offers approximately 30km of trails and Sparrow Hill offers around 90km of trails. The trails in both areas are purpose built and maintained by volunteers. The Kowalski Classic event was held in Kowen Forest between 2012 and 2017 and the MONT 24 Hour Race was held between 2009 and 2017. Clear fell harvesting in 2017 changed the riding landscape and dramatically reduced the trail network and the scale of events in these areas.

### **Tuggeranong Pines, Isaacs Pines and Zoo Pines**

Tuggeranong Pines offers 5kms of mostly black trails to the south of Canberra. It caters for all-mountain and downhill riders.

Isaacs Pines has 23 hectares of commercial pine plantation and significant areas of native vegetation that form part of the Canberra Nature Park. It has a small number of blue and black trails. The Isaacs Pine Trails Group works with ACT Parks and Conservation Service to manage and maintain the trail network.

Zoo Pines is a 6km network of trails in a small plantation behind the National Zoo and Aquarium near the National Arboretum. The trails were

Zoo Pines contains ten green trails that were built and are maintained by the Kowalski Brothers Trailworks volunteer group.

### **Canberra Nature Park**

Canberra Nature Park is made up of 37 reserves located within or close to existing urban boundaries which are managed for their ecological and recreational qualities. Proximity to residential areas makes Canberra Nature Park a popular recreation venue for mountain bikers, walkers and equestrians.

The extensive network of management trails and multi-use tracks provide for cycling. The trails are maintained by the ACT Parks and Conservation Service, with support from ParkCare volunteers and recreation user groups. The tracks generally meet the Class 3 walking track standard and follow best practice for mountain bike tracks for attributes such as slope, alignment and drainage. Mountain biking is not permitted on walking tracks (refer Appendix C for trails where cycling is permitted).

Mountain biking is specifically catered for on the Canberra Centenary Trail and on trails within Bruce Ridge Nature Reserve (refer Section 4.2.7).

Informal or unsanctioned tracks have been created in some reserves which have the potential to have a detrimental impact on the reserve's values. The ACT Parks and Conservation Service, CORC, ParkCare and trail volunteer groups work in partnership to discourage this type of behaviour and rehabilitate affected areas.

With an increasing population and the development of new suburbs in Canberra, the recreational pressure on Canberra Nature Park will continue to increase over coming years. It is likely that there will be a corresponding increase in the number of mountain bikers using the reserve network.



The Canberra Nature Park Draft Reserve Management Plan 2019 requires a review of tracks and trails and preparation of a track management plan. This will include closing informal tracks and classifying any new tracks in accordance with Australian standards. The draft plan also requires the development of mountain bike areas to consider likely flow-on effects for adjacent reserves.

### **Bruce Ridge Nature Reserve**

Bruce Ridge Nature Reserve, part of Canberra Nature Park, is a 98-hectare gentle ridge bordering Black Mountain and O'Connor Ridge nature reserves. It is part of a generally wooded, rolling hills landscape which provides a natural bushland setting for suburbs in central and northern Canberra.

It is the only nature reserve that has formalised single track (approximately 15-18km of trail) which is managed by the ACT Parks and Conservation Service in cooperation with the ParkCare Group and the Friends of Bruce Ridge Reserve. The trail network consists of single track in a small area with flowing sections and minor technical challenges (mainly logs), some loose surfaces and climbing.

The trail network is mapped with a series of signposts to inform users of the various loops and interconnected trails. Use of the reserve for mountain biking has increased substantially in recent years.

### **Murrumbidgee River Corridor**

Pine Island Reserve is in Tuggeranong to the south of Canberra. The reserve is part of the Murrumbidgee River Corridor. It has six trails and is managed by volunteers. Pine Island is also one of the access points for the 27km Murrumbidgee Discovery Track. The trail between Pine Island and Point Hut Crossing is regularly used by mountain bike riders.

### **Tidbinbilla Nature Reserve and Namadgi National Park**

Mountain biking in these protected areas is generally restricted to vehicle management trails or designated multiple-use trails.

Within Tidbinbilla Nature Reserve the Congwarra Trail and Gibraltar Peak Trail are designated as multiple use trails. Overnight accommodation is available at Nil Desperandum, an historic rammed earth cottage.

Namadgi National Park and neighbouring Kosciuszko National Park (NSW) offer over 1500 kilometres of management trail accessible to mountain bikers seeking gravel grinding adventures and bike packing.

### **The Centenary Trail**

The Centenary Trail is a 149km self-guided, non-motorised loop trail for walkers and cyclists that showcases Canberra's urban and rural environments. It follows fire trails, walking tracks and shared paths.

The Centenary Trail is divided into daily sections, spaced for walkers and cyclists. Users can join or leave the trail in many locations.

In some cases, the Centenary Trail links with existing mountain bike trails such as the National Arboretum and Stromlo Forest Park via a new alignment. In some areas such as Majura Pines there is a significant opportunity to improve these linkages for riders and reduce informal or unsanctioned trail development.

### **The National Arboretum**

The National Arboretum provides for cycling on all designated roads and unsealed trails. It provides good facilities for riders, including toilets and café/restaurant. 12 kilometres of new trail is currently under construction. The National Arboretum forms a connection between Stromlo Forest Park and Black Mountain/north Canberra. The Centenary Trail weaves through the site and connects the National Arboretum with Stromlo Forest Park via a realigned route.

### **Bicentennial National Trail**

The Bicentennial National Trail is a multi-use trail that is 5000 kilometres in length located through Queensland, New South Wales, Victoria and the ACT. This trail is shared with equestrians, walkers, runners and cyclists.

### **6.3 SKILL DEVELOPMENT**

Skill development is an important consideration as most mountain bikers do not belong to a club or organisation. Generally, juniors tend to enter the sport through parents or friends. Several secondary schools operate programs providing a point of entry for those who may not otherwise have exposure. A strategic approach to make mountain biking appealing, accessible and easy to new entrants and beginners is critical for the future development of the sport. This includes consideration of easy mountain bike trails; skills parks; mountain bike training and skills sessions; and pump tracks in suburbs around Canberra. The following case study provides a good example of community involvement in this important aspect of mountain biking.





Credit: Alan Vogt, Kowalski Brothers Trailworks Skills, Trail Construction Aranda Public School 2018

## Case Study: Kids Skills Trail - Canberra<sup>15</sup>

In 2016 the Kowalski Brothers Trailworks volunteer trail building group constructed a 'Kids Skills Trail' in Haig Park for KIDSCAPE 2016 – a one-day public event organised by the Australian Institute of Landscape Architects. A portable 'skills trail' was built with a series of timber 'trail features' that looped in and out through the trees. The skills trail was very popular with children and parents.

The concept was extended to Aranda Public School in 2018 with the construction of a skills trail with support from volunteers and the school's staff, parents, and children.

This vision of the Kowalski Brothers Trailworks group is to see development of kids' skills trails in every suburban park and shopping centre green space in the Canberra region on the basis that:

- every suburb has people with the requisite skills and experience to build the trail
- the cost of building and landscaping materials is relatively low
- the majority of 'trail building' can be done with traditional landscape/garden tools and techniques can be taught quickly
- the design of a skills trail can be very flexible and can work with natural terrain.

The concept of 'Kids Skills Trails' has multiple benefits:

- participation in a community-led initiative draws communities together and creates a valuable community asset
- it attracts parents and children to use their local park more often
- it encourages children to ride their bike and learn valuable skills to improve their confidence
- it forms an important part in encouraging recreation and sports participation.

---

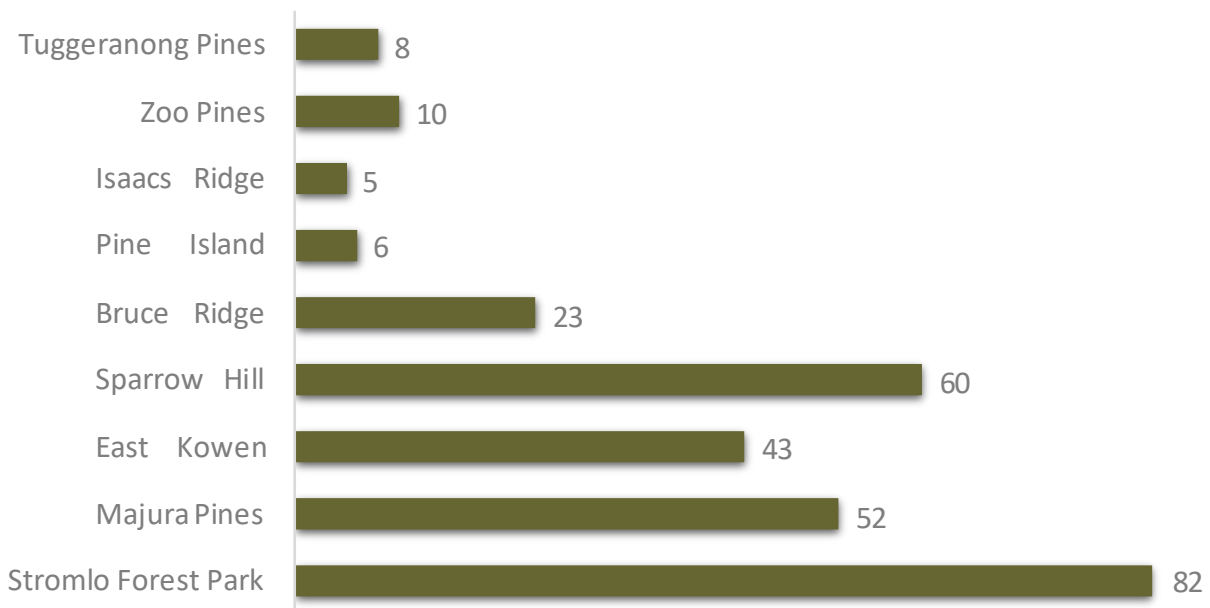
<sup>15</sup> Concept: Community-Led Kids Skills Trails in Suburban Parks, Kowalski Brothers Trailworks 2019

## 6.4 ANALYSIS OF CANBERRA'S MOUNTAIN BIKE TRAIL NETWORK

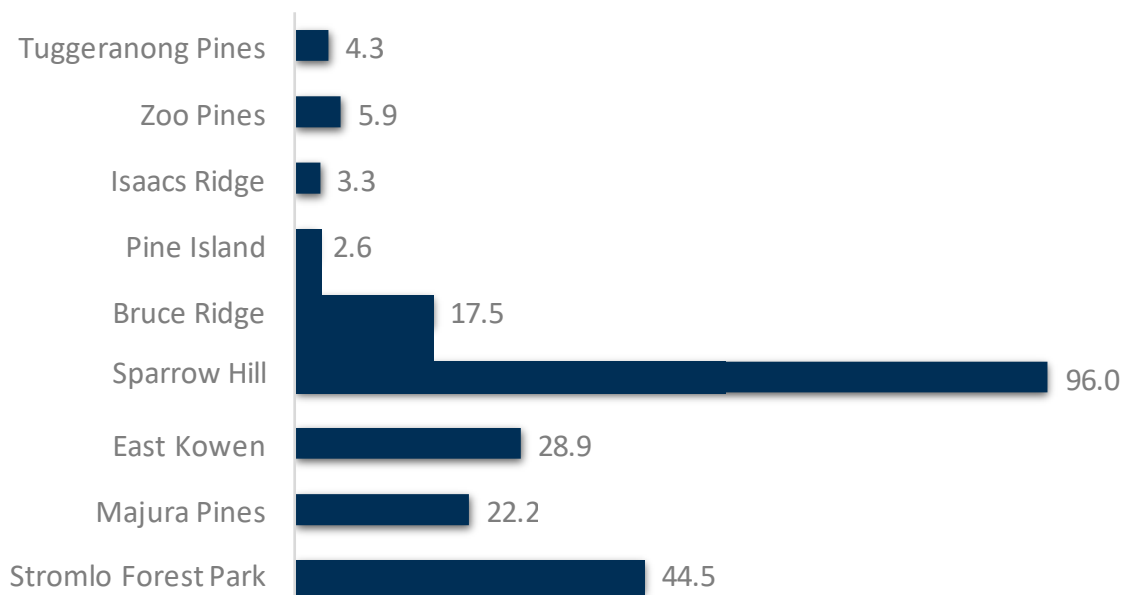
### Number and Distance of Trails

Stromlo Forest Park contains the largest number of trails in one location (refer Figure 5). When combined, the ACT's plantation forests host the largest number and kilometre of trails across multiple locations, with Sparrow Hill, Majura Pines and East Kowen offering most of the trails (refer Figures 5 & 6).<sup>16</sup>

**Figure 5. ACT Mountain Bike Network – Total Number of Trails**



**Figure 6. ACT Mountain Bike Network - Total Distance (km)**



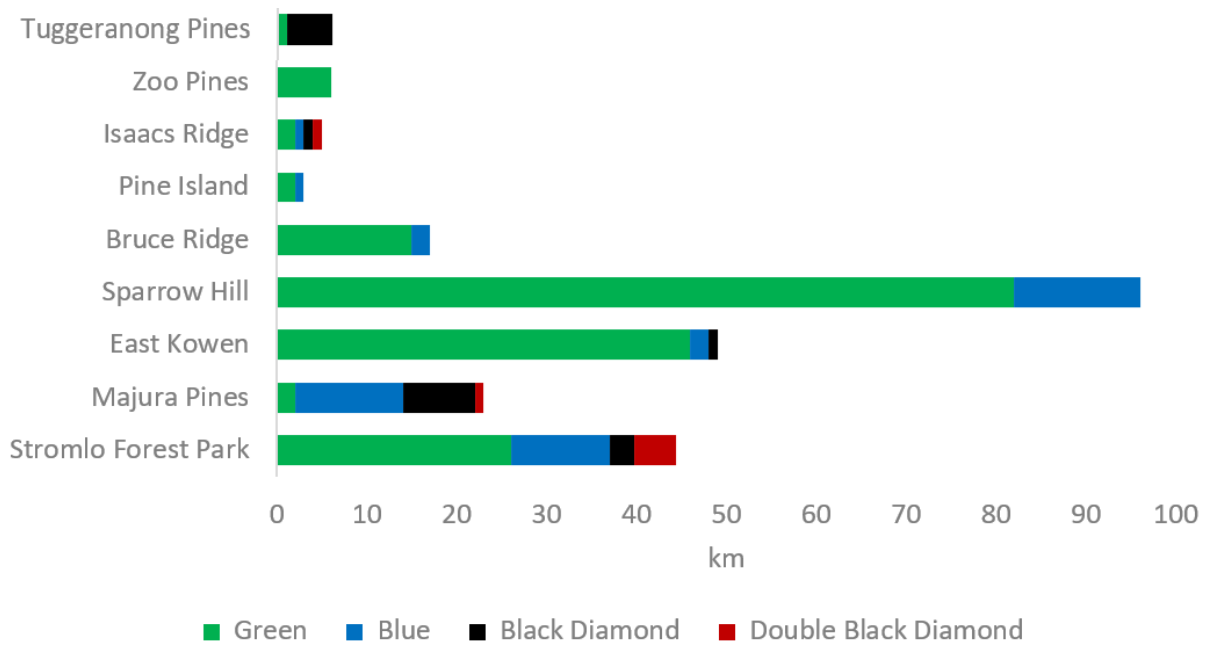
<sup>16</sup> <https://www.trailforks.com>



## IMBA Trail Types

Different trail types suit different styles of riding and typically each trail type will have specific design attributes. Using the IMBA rating system (refer Appendix D), most mountain bike trails in the ACT are green and blue. Stromlo Forest Park and Majura Pines offer most of the ACT's black and double black trails (refer Figure 7).<sup>17</sup>

**Figure 7. ACT Mountain Bike Network - IMBA Rating**



<sup>17</sup> <https://www.trailforks.com>

## Style of Trail

While diverse, each of the trail types meet a different market segment. Cross country trail riding is the most popular form of mountain biking nationally and internationally and this is reflected in the prevalence of cross-country trails in the ACT (refer Table 4).<sup>18</sup>

The analysis in Table 4 indicates that the ACT lacks gravity, flow trails and technical elevated trails as well as 'hero' or distinctive rides. Additional pump tracks and skill development areas would also support development and growth of mountain biking.

**Table 4. Style of Trail and IMBA Classification**

STYLE OF TRAIL AND IMBA RATING												
Trail Name	Cross Country	All Mountain	Free Ride	Down Hill	Four Cross	Dual Slalom	Dirt Jump	Pump Track	●	■	◆	◆◆
Tuggeranong Pines	✓	✓	✗	✓	✗	✗	✗	✗	●	■	◆	
Zoo Pines	✓	✗	✗	✗	✗	✗	✗	✗	●			
Isaacs Pines	✗	✗	✗	✓	✗	✗	✗	✗	●	■	◆	
Pine Island	✓	✗	✗	✗	✗	✗	✗	✗	●			
Bruce Ridge	✓	✗	✗	✗	✗	✗	✗	✗	●	■		
Sparrow Hill	✓	✗	✗	✗	✗	✗	✗	✗	●	■		
Kowen Forest	✓	✗	✗	✗	✗	✗	✗	✗	●	■		
Majura Pines	✓	✓	✗	✓	✗	✗	✓	✓	●	■	◆	◆◆
Stromlo Forest Park	✓	✓	✗	✓	✓	✗ Underway	✓	✓	●	■	◆	◆◆

## Visitor Services and Amenities

Trail services and amenities typically include clear, accessible information on orientation and wayfinding, trail standards, difficulty ratings, appropriate user behaviour and journey length. Visitor amenities could also include water, toilets, shelter and picnic facilities close to trails as possible. Table 5 provides a summary of existing infrastructure at each of the trail hubs. Stromlo Forest Park provides the most consistent approach to infrastructure with good signage and amenities. Other hubs need additional infrastructure to service the needs of users.

<sup>18</sup> Style of trail sourced from Trail Mate 2019



**Table 5. Summary of Visitor Services - ACT Trail Networks**

	Toilets	Shuttle Bus	Food & beverage on site	Trail Signage/ Map	Web / Social	Supporting Bike services at site	Accommodation	Proximity to public Transport	Car parking	Event Infrastructure
<b>Tuggeranong Pines</b>	✗	✗	✗	✓	✗	✗	Within 10 kms	✗	✓	✗
<b>Zoo Pines</b>	✗	✗	✗	✗	✗	✗	Within 10 kms	✓	✓	✗
<b>Isaacs Pines</b>	✗	✗	✗	✗	✗	✗	Within 10 kms	✓	✓	✗
<b>Pine Island</b>	✓	✗	✗	✗	✗	✗	Within 10 kms	✓	✓	✗
<b>Bruce Ridge</b>	✗	✗	✗	✓	✓	Within 10 kms	Within 10 kms	✓	✓	✗
<b>Sparrow Hill</b>	✓	✗	✗	✓	✓	✗	Bungendore /Queanbeyan	✗	✓	✗
<b>East Kowen</b>	✗	✗	✗	✓	✓	✗	Bungendore /Queanbeyan	✗	✓	✗
<b>Majura Pines</b>	✓	✗	✗	✓	✓	Within 10 kms	Within 10 kms	✓	✓	✓
<b>Stromlo Forest Park</b>	✓	✓	✓	✓	✓	✓	Proposed	✓	✓	✓
<b>Tidbinbilla</b>	✓ at visitor centre	✗	✓ at visitor centre	✓	✓	✗	✗	✗	✓	✗
<b>Namadgi National Park</b>	✓ at visitor centre	✗	✓ at visitor centre	✓	✓	✗	✗	✗	✓	✗

## 6.5 EVENTS

Events attract visitors to the ACT and are an important part of mountain biking. Social and competitive events contribute to the creation of the social fabric of mountain bike communities. Events typically do not appeal to the leisure market (non-core markets), but they are a major motivator for the sport cohort, and to an extent a motivator for enthusiasts (core markets).

Events provide an opportunity for interstate participants to familiarize themselves with the other opportunities available in the ACT and are a mechanism for capturing economic benefits. Event media coverage can be leveraged to raise the profile of the ACT generally and as a mountain bike destination.

The ACT has attracted many events in the past both at Stromlo Forest Park and Kowen Forest. Given the harvesting schedule in the plantation forests, most mountain bike events are now held at Stromlo Forest Park. The focus of racing is on cross country, but with significant participation in Enduro and downhill events. Opportunities for more downhill and gravity events are constrained by the relative lack of elevated trails and the critical mass of 100km+ for marathon events in the ACT.

Organisers have reported the managerial structure of Stromlo Forest Park is a significant drawcard for holding events. There is also significant depth of event management knowledge within the volunteer community.

---

Existing and new events provide vibrancy to the Canberra's cycling scene and offer significant opportunities to attract new markets and generate economic benefits.

---



## 6.6 CYCLING CLUBS AND INTEREST GROUPS

Canberra Off Road Cyclists (CORC) is the largest mountain bike club in Australia and offers a variety of competitive and social activities. CORC has been heavily involved in the promotion of mountain biking and events in the ACT, the construction of tracks, and currently runs about 70 racing events each year. CORC also works with its partners to facilitate event development at Stromlo Forest Park.

Pedal Power is an ACT based cycling advocacy and promotion organisation and focuses purely on non-competitive riding. Pedal Power is supported by the ACT Government under the ACT Health Promotion Grants Program.

Other cycling clubs operating in Canberra relevant to mountain biking include the Canberra One Gear Society, the Australian Defence Force Cycling Club, the Vikings Cycling Club, and the Canberra BMX Club.

## 6.7 OTHER USER GROUPS

In addition to the user groups, individuals, informal groups and chapters of other associations advocate, promote and manage mountain biking in the ACT. Like most of the existing volunteer bodies, the informal groups rely on a few dedicated volunteers to ensure the activity is being promoted and trail infrastructure is being developed and managed.

There are also a range of other user groups with an interest in trails for walking and equestrian activities. It is important to consider the needs of these groups when planning for new or enhanced trails for mountain biking.

## 6.8 INDUSTRY OPERATORS

The mountain bike industry in Canberra comprises of a diverse range of retailers, event organisers, facility co-ordinators, skill development trainers and other commercial operators.

### **Retailers and Distributors**

There are more than 50 cycle retailers in Canberra, distributed across the city. Like any industry, some operators specialise in their offer. Most retailers provide supporting workshop services (service and repair) and act as a point for information distribution to the wider public on mountain bike opportunities in the ACT.

Trek, a major international cycle manufacturer and distributor, recently located its Australian headquarters to Canberra. Trek Australia employs 26 people in professional/managerial roles, of which 20 are based in Fyshwick. Trek hosts regular client testing days ranging from annual events with around 100-200 customers travelling to Canberra to participate, to weekly events attended by up to 10 customers. Trek uses Stromlo Forest Park for these events.

### **Event organisers**

Event organisers range from local clubs such as CORC to local and interstate commercial operators. Most event organisers rely heavily on volunteers for operational requirements. There are several event hire businesses in Canberra, providing specialist equipment to riders, and event organisers.

### **Trail developers**

Trail developers possess specialist knowledge necessary to ensure that facilities are safe, sustainable, and provide the experience sought by riders. In recent years, the level of knowledge and expertise of community volunteers in relation to trail development has increased markedly as a result of support provided by Government (for example, in supporting and facilitating volunteers to implement trail works at Bruce Ridge) or as a result of participation in organised trail building by volunteer groups at East Kowen and Majura Pines.



## 6.9 SUPPORT SERVICES

Several other businesses interface with mountain biking in the ACT. This ranges from marketing companies promoting Canberra as a mountain biking destination, to accommodation providers such as the Crowne Plaza Hotel who offer 'bike friendly' accommodation and web site owners (e.g. The Berm, Ride Canberra). Although currently limited, the number of tour operators offering Canberra based mountain bike packages is likely to increase in coming years if the trail network is expanded.

## 6.10 SKILL DEVELOPMENT

Several commercial operators provide skill development courses for a range of abilities and ages. These courses are mostly undertaken at Stromlo Forest Park.

The Australian Federal Police utilise local mountain bike facilities as part of their cycle training. Several educational establishments including Canberra Grammar School offer mountain biking as an extracurricular activity for students.

## 6.11 MARKETING AND PROMOTION

Several websites currently promote Canberra's trail network. Stromlo Forest Park, Majura Pines, Bruce Ridge, Kowen Forest/Sparrow Hill and CORC all have websites and use social media to provide trail information without unified branding or messaging. Visit Canberra also promote mountain biking at Stromlo Forest Park, Majura Pines and the Centenary Trail. There are also several trail websites/apps such as Trailforks and Kowalski's Trail Buddy that provide information on trails in the ACT and detailed maps of ride locations.

## 6.12 COORDINATION AND MANAGEMENT

Except for Stromlo Forest Park each trail hub is currently managed independently by volunteer groups managed by ACT Parks and Conservation Service or ACT Forestry. These groups build and maintain high quality trails that are the backbone of ACT's mountain bike offering.

Each hub has an overarching plan for trail development, and all are competing for the same funds and volunteer resources to build and maintain their trail network. The absence of an overarching vision and plan that binds these groups limits the ability to prioritise trail development and maintenance across the ACT and development mountain biking in a co-ordinated way.

## 6.13 ASSESSMENT OF CANBERRA AS A MOUNTAIN BIKE DESTINATION

An assessment of the ACT's mountain biking offering against the features of successful mountain biking destinations shows that it has the potential to become an international mountain bike destination (refer Table 6 and 7).

It currently provides or partially provides most of the features and characteristics of other successful mountain bike destinations and with further investment, has the potential to achieve that status.

Investment is required in the following priority areas:

- New trails that provide aspirational experiences
- New trails with elevation
- High-quality trails that provide a minimum of two days riding for visitors
- Hubs with at least 100km of trails to attract events
- More infrastructure and additional services
- Clear positioning and coordinated marketing
- Central information portal
- Trail development and maintenance of existing trail hubs.

The critical enablers to make this happen are:

- improved funding and resources
- improved quality of trail design, management and maintenance consistent with best practice standards.
- mountain biking governance and trail management arrangements to guide implementation of this report.

**Table 6. Assessment of Canberra as a mountain bike destination**

FEATURES	RATING
Sustainable trail network	*
Diversity of trails	***
60-80km of trail	*
Reason to return	**
Accessible to tourism hub	***
Quality pre-trip information	*
Sustainable management	*
Unique landscape	***
Bike-friendly accommodation	**
Supporting services	**
Commercial operators	**
Clear MTB positioning	*
Active marketing	*
Other attractions	***

\* Limited  
 \*\* Good  
 \*\*\* Excellent

**Table 7. Assessment of Canberra as a mountain bike destination**

CRITERION	ASSESSMENT	GAPS
<b>Diversity of trail types, styles and destinations</b>	The existing network is sufficiently diverse to form the basis of a national/international trail network.	A 'hero' or aspirational ride for visitors that provides elevation and offers opportunity for events. The ACT lacks gravity, flow trails and technical elevated trails as well as enough rides that allow for at least 2 days riding to draw national and international attention. The lack of trail hubs with a density of trails in excess on 100kms – which significantly limits attracting marathon style race and participation events.
<b>Concentration of trail opportunities</b>	The ACT's trail hubs offer good riding opportunities with good connections to other hubs and supporting services.	Information on how to access the network and various trails hubs and supporting services is essential for visitors.
<b>High quality, sustainable trail infrastructure</b>	The quality of most trails is moderate to high and consistent with IMBA trail guidelines. The quality of the trail network outside Stromlo Forest Park is susceptible to changes in volunteer effort and resources available for maintenance.	Consistent trail standards, safety and risk management standards, high quality trailhead facilities and trail improvements are required across all trail hubs.
<b>Accessibility</b>	Canberra's international airport is centrally located to all trail hubs. Each hub has good road access and centrally located near accommodation and other attractions and services.	Limited linkages between Canberra airport and existing trail hubs. Lack of shuttle services to/and from existing hubs.
<b>Management and governance</b>	The lack of strategic approach to network development, maintenance and facilities across the ACT will limit its ability to be a national/international mountain bike destination.	The ACT requires a management body to oversee the development of the trail network and ensure quality experiences. It would also provide the opportunity to better leverage the economic advantages associated with mountain bike tourism, investment funding and revenue opportunities.



CRITERION	ASSESSMENT	GAPS
<b>A strong overall visitor experience</b>	The ACT has a strong mix of attractions, restaurants, cafes, breweries and accommodation for visitors to support a range of experiences. This, combined with its landscape and natural attributes, provide visitors with good riding opportunities that are not found elsewhere in Australia.	The lack of an aspirational ride is a significant gap for the ACT. The reason to visit (and ride) must be compelling for interstate and international visitors. Attracting international events is constrained by the lack of elevation and critical mass of trails (100+km) at Stromlo Forest Park. The ongoing attraction of events will be critical for the ACT and to grow its reputation as a MTB destination of choice.
<b>High quality pre-trip and on-site information</b>	CORC, Majura Pines, Bruce Ridge, Stromlo and East Kowen and Sparrow Hill maintain their own websites. Some information is available on <a href="http://www.visitcanberra.com.au">www.visitcanberra.com.au</a> . Strava, Moves Count, AllTrails and TrailForks websites also provide information. Apps currently available include called 'Kowalskis Trail Buddy' which has detailed maps of several ride locations.	A comprehensive website and mobile app with information on trails and services is a significant gap. The need for free, consistent, high quality website/apps/social media presence with information regarding the track network, events, accommodation, transport with booking capability is essential. A good example is <a href="https://www.ridehighcountry.com.au/">https://www.ridehighcountry.com.au/</a>
<b>A range of quality support services and facilities</b>	Stromlo Forest Park has a range of facilities and services for visitors. Other hubs have very few facilities although they are located close to the CBD which provide a range of visitor services.	There is a lack of supporting infrastructure such as carparking, bike racks, storage, signage, interpretation water fountains at major hubs.
<b>Trail, food, beverage and retail products and businesses</b>	There is a good foundation of infrastructure in the ACT to support visitors with cafes, restaurants, shopping bike shops etc.	Whilst there are food/beverage and other services in close proximity to the trail hubs, information on how visitors can access these services is essential.
<b>Strong trail destination positioning and marketing</b>	Strong positioning has been identified in the CBR Cycle Tourism Strategy as a critical action	Canberra lacks clear positioning for what it offers as a mountain bike destination. Positioning Canberra as the 'the Mountain Bike Capital of Australia' could be considered. This could be further leveraged if Canberra becomes an IMBA Gold Ride Centre Status.





Credit: Leena Cavenagh Fresh Morning on the Waterholes Fire trail



# 7 Investing in New Trails - Potential Locations

This section describes the potential locations for new trails in the ACT.

Canberra has already gained a reputation for its mountain biking and has significant potential to become a world class mountain biking destination and an International Mountain Biking Association (IMBA) Ride Centre. New trails, experiences and events suited to local, national and international riders will help consolidate this potential.

The success of mountain biking in the ACT will rely on offering new and unique trails in appropriate locations. Trail-based recreation opportunities for other users such as walkers, trail runners and equestrians is also an important consideration in the development of new trails.

Several potential locations for new trail development were identified during stakeholder consultation. Options that offered the best potential for the development of new trails included (i) extending the mountain bike hubs within plantation forest areas (ii) expanding the existing trail network at Stromlo Forest Park (iii) developing trails in new areas.

A prioritisation framework was used to assess the potential of each option according to the following criteria:

- Tenure - the scope and scale of potentially developable land in the context of the Territory Plan for land use
- Quality - the topography, landform, vegetation suitable for trail development that would provide elevation and aspirational experiences
- Values - the uniqueness, nature, character, condition and important natural and cultural values of the landscape
- Connectivity - the location, proximity to other major trail hubs such as Stromlo Forest Park, shuttle services, accommodation, water, toilets and other necessary infrastructure

- Access - the proximity to services, vehicular access and parking, primary roads and public transport.

The analysis concluded that the expansion of the existing trail networks at Majura Pines and Bruce Ridge was constrained due to the overriding conservation objectives of the adjacent area (Canberra Nature Park) and the requirements of the Canberra Nature Park Draft Plan of Management. Similarly, expanding the trail network in Stromlo Forest Park will remain a priority, however it is constrained by the boundary of the park and the lack of elevation. Trail development at Stromlo Forest Park will not achieve the elevation and aspirational experience required to establish the ACT as an international mountain bike destination.

The assessment concluded that the areas west of Stromlo Forest Park, the Cotter Recreation Reserve, and Blue Range area in Uriarra Forest offer the best potential for new trails. Stromlo Forest Park will act as a 'gateway' to these trails providing a convenient location for shuttle services, accommodation, events and other infrastructure and services required by riders. The new trails will provide elevation and they will be remote yet accessible and suited to a range of users. The new trails will 'define' mountain biking in Canberra for visitors and provide the imagery that will reflect its position as the Mountain Bike Capital of Australia.

Pierces Creek Forest is currently utilised by trail bikes and while it offers the potential for mountain bike trails it is not considered a priority of this report.



## Sustainable Trails

The concepts discussed in this section will be subject to environmental and cultural heritage assessment and further detailed design to ensure the sensitive siting, design and protection of each area's important values.

The International Mountain Bicycling Association (IMBA) identifies core elements for a sustainable trail which are successfully applied to a range of trail types. These core elements will need to be balanced equally in the development of the new trail network. If any one element is overemphasised at the expense of the other there is the potential to negatively impact on the area's natural and cultural values, provide an unsafe or negative experience, and impact financially or practically on trail maintenance. Sustainable trails should have very little impact on the environment; resist erosion through proper design, construction and maintenance and blend with the surrounding area<sup>19</sup>.

Sustainable trails do not require extensive infrastructure. They make the most of the natural features of an area without introducing infrastructure that may compromise the natural appeal and character of the area: the reason users are attracted to trails in the first place. An important 'rule of thumb', therefore, is to plan the route so that the need for infrastructure, such as bridges, switchbacks, retaining walls, etc., is minimised. This will not only minimise associated visual and environmental impacts, it will also reduce the investment required to build and maintain the trails.

A sustainable trail network can only be achieved with ongoing management and maintenance which will include:

- Infrastructure maintenance and repair (trail surfaces, signage, parking areas, amenities, waste management)
- Environmental management – erosion and runoff control, vegetation management, weed and pest control, significant species protection and fire management which will have associated legislative requirements
- Emergency management – emergency access provision, issue of emergency notices (such as for fire, flood) and trail closures
- Visitor management – overseeing compliance with any use requirements, management of trail events.

## Proposed Areas for Trail Development

The following section describes the opportunity for new trail development in the following areas:

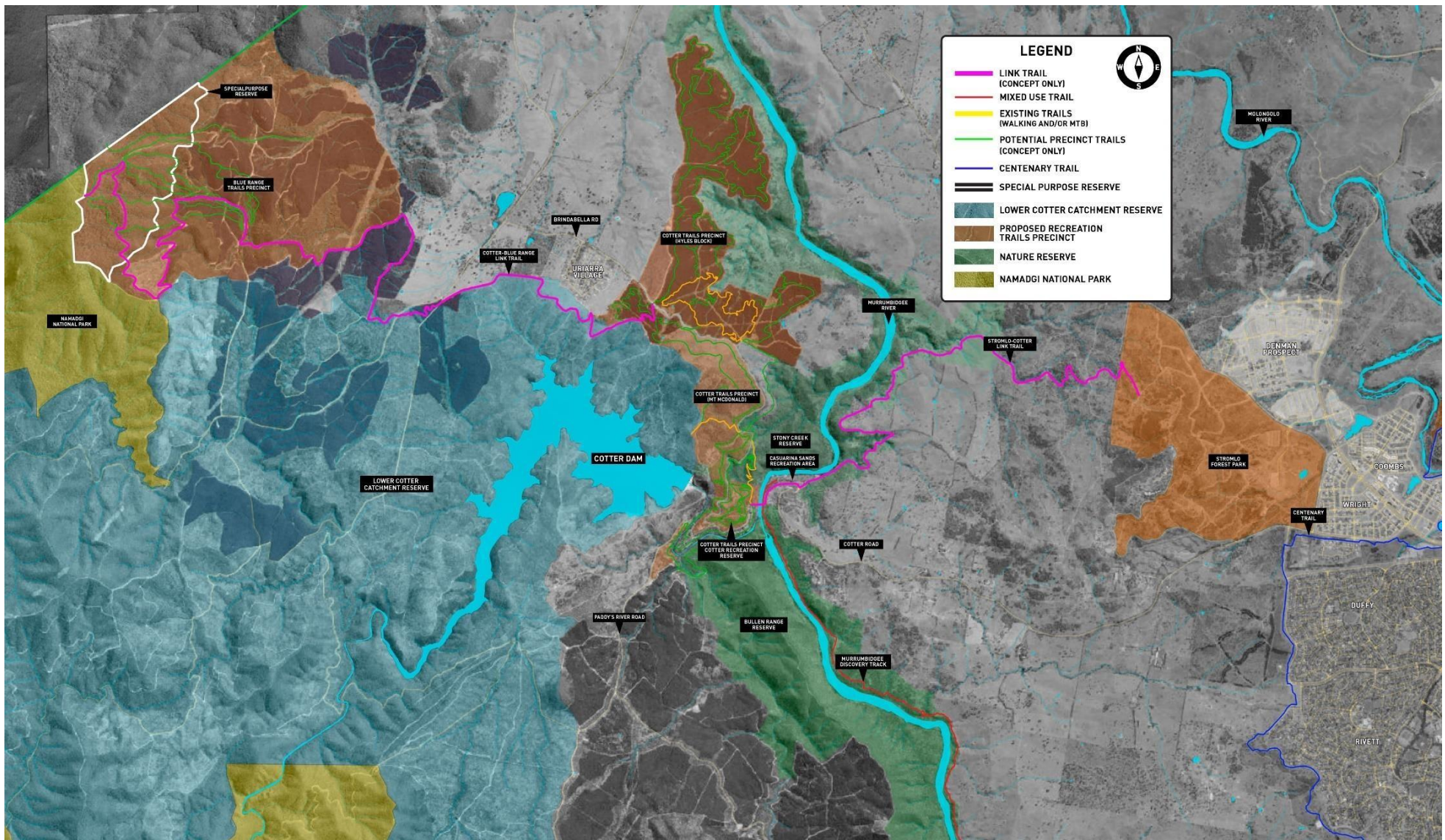
- West of Stromlo Forest Park
- Cotter Recreation Reserve
- Blue Range Area, Uriarra Forest
- Murrumbidgee Discovery Track (Casuarina Sands to Kambah Pool).

Figure 8 presents the proposed new trail locations in the context of the other trail hubs and the ACT.



---

<sup>19</sup> Guidelines for a Quality Trail Experience, IMBA 2017

Figure 8. Overview of the proposed concept for new mountain biking trails west of Stromlo Forest Park



**Table 8. Trail to the West of Stromlo Forest Park (Stromlo Cotter Link Trail)**

DESCRIPTION	CROSS COUNTRY
<b>Difficulty Level</b>	 Easy
	 Intermediate ( option for alternate challenging loops off main trail)
	Suit core and non-core mountain bikers
<b>Approximate Distance of trails</b>	13 kilometres
<b>Trailheads</b>	Stromlo Forest Park and Cotter Recreation Reserve
<b>Key Features</b>	Stony Creek Reserve, Murrumbidgee River Corridor and Cotter Recreation Area
<b>Lowest Elevation</b>	370 metres at Casuarina Sands Recreation Area
<b>Highest Elevation</b>	770 metres at Mt Stromlo Observatory and 600 metres at Stromlo Forest Park Trail Head
<b>Vertical Elevation Range</b>	Approximately 400 metres
<b>Land Tenures</b>	Suburban Land Agency Crown lease land Stony Creek Nature Reserve Murrumbidgee River Corridor

**Description**

- Much of the trail to the Cotter Recreation Area would be in the Stony Creek valley within the Stony Creek Nature Reserve.
- This trail provides an off-road connecting corridor from Stromlo Forest Park (West) to Casuarina Sands Recreation Area and Cotter Recreation Area. The trail could potentially link to alternative car parks off Uriarra Road to link to a contour trail along the Stony Creek tributary of the Murrumbidgee River.
- There is an option to develop more challenging loops or parallel trails off the main green trail and to provide a return loop back to Stromlo Forest Park.
- The trail would follow the south side of the Stony Creek in preference to the steeper north side which requires a more complex gorge crossing as the trail approaches the Murrumbidgee River.
- The trail would cater for a range of riding abilities featuring various difficulty levels and good opportunities for rider challenge and progression.



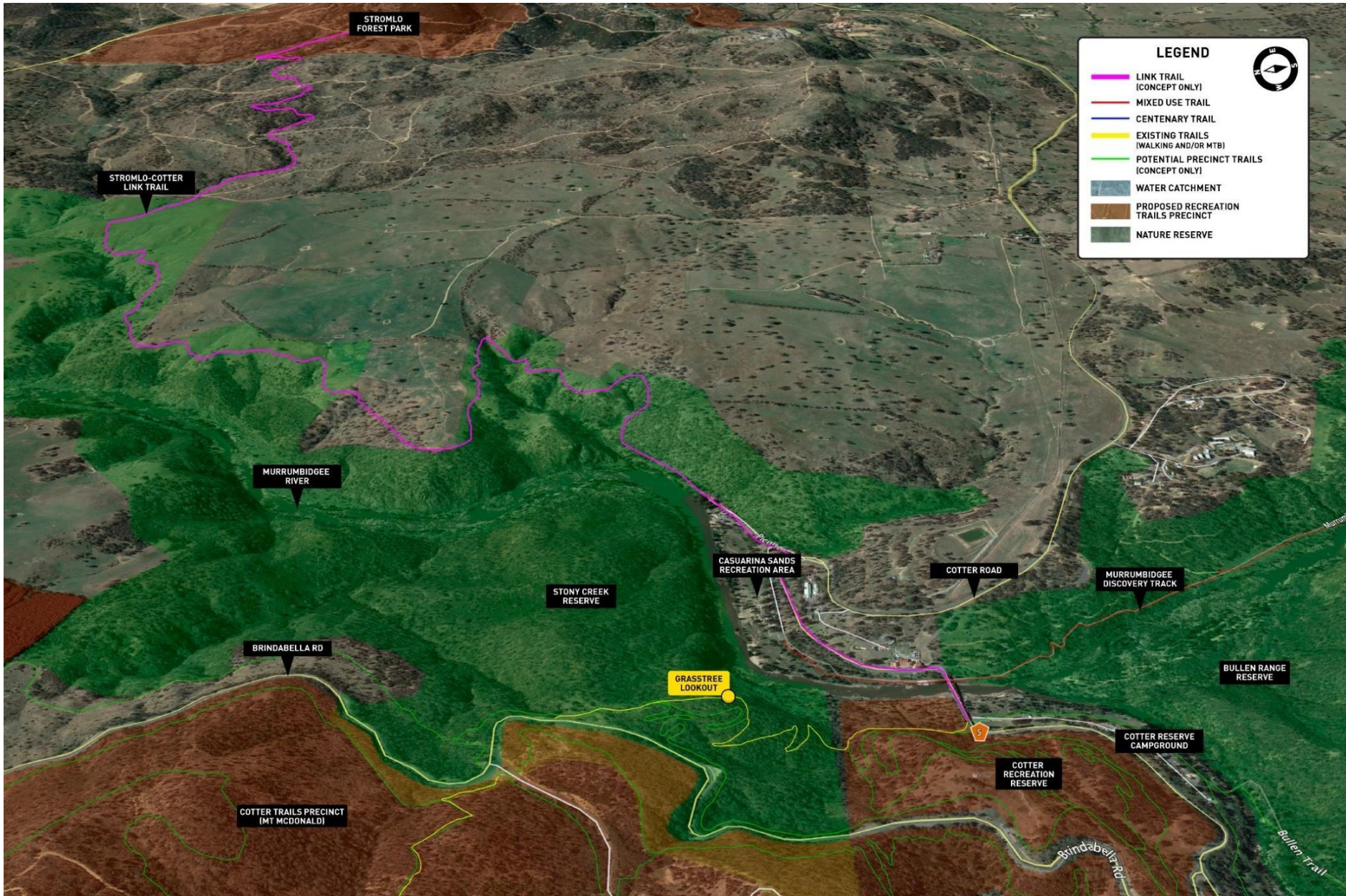
### **Rationale**

- It provides an attractive extension to the existing trail network at Stromlo Forest Park.
- It strengthens the positioning of Stromlo Forest Park to be the 'gateway' for riding the trail to the Cotter Recreation Reserve.
- It utilises existing supporting infrastructure at Stromlo Forest Park, including proposed accommodation, shuttle services.
- Stromlo Forest Park provides an excellent base for staging events in this area.
- It provides visitors to the Cotter Recreation Reserve with an option to ride from Canberra suburbs via Stromlo Forest Park.
- The connection with Cotter Recreation Area provides a 'destination ride' and will potentially encourage a range of bike-friendly pop up cafes and other services that will benefit all users of the reserve.

### **Considerations**




- The professionally built trail will embrace sustainable design and management infrastructure.
- The ACT Parks and Conservation has indicated in principle support for this trail subject to further environmental assessment. An Environmental Significance Opinion (ESO) or Environmental Impact Statement (EIS) would be required as part of the detailed design phase of the trail.
- Conservation objectives of the Murrumbidgee River Corridor are set out in the Murrumbidgee River Corridor Management Plan 1998. The plan seeks to ensure protection of the river corridor and water quality values.

Figure 9. Stromlo Cotter Link Trail Concept Plan





**Table 9. Cotter Recreation Area Trails Precinct Concept Plan**

DESCRIPTION	CROSS COUNTRY
<b>Difficulty Level</b>	 Easy
	 Intermediate
	 Difficult
	Suit core and non-core mountain bikers
<b>Approximate Distance of trails</b>	Variable
<b>Trailheads</b>	Cotter Recreation Reserve (various options)
<b>Key Features</b>	Stony Creek Reserve, Murrumbidgee River Corridor and Cotter Recreation Area.
<b>Lowest Elevation</b>	370 metres at Casuarina Sands Recreation Area
<b>Highest Elevation</b>	780 metres at Mt McDonald
<b>Vertical Elevation Range</b>	Approximately 410 metres
<b>Land Tenures</b>	Stony Creek Nature Reserve Murrumbidgee River Corridor Cotter Recreation Area

**Description**

- The Cotter Recreation Area is part of the Murrumbidgee River Corridor. It includes the popular area of Casuarina Sands, Cotter Avenue, Cotter Bend and Cotter Campground.
- The reserve is popular for trail-based recreation and additional trails will complement this established use.
- The Cotter Recreation Area provides for several walks such as the Cotter Reserve Cotter Dam Discovery Trail, Cotter Explorer Track, Cotter Dam Lookout, the Bullen Track and Cotter Catchment Lookout Track. These walks will remain as walking trails as specified. Where possible, new trails will be designed for shared use.
- The attractive landscape and supporting infrastructure would provide for a variety of new riding experiences.
- The trails would provide for a range of riding abilities featuring a range of difficulty levels with good opportunities for rider challenge and progression.
- Trails in this area can promote the Murrumbidgee and Cotter Rivers and its biodiversity values. Trails will feature views of the catchment, native vegetation and the steep and varied topography.
- The planning and design phase should clearly determine whether the trail is intended for single or shared-use. While trails can be designed to accommodate a range of users, this will depend on several factors including demand, cost, access and land suitability.
- Single tracks for mountain biking should be well signposted to inform users of trail protocols.
- The trails can potentially link to the Murrumbidgee Discovery Track, existing trail in Hyles Block Planation Forest and with new trails in the Blue Range area.



---

### **Rationale**

- The Cotter Recreation Area is a well-established area with picnic, barbeque, water and toilets for visitors. It provides a range of recreation opportunities including swimming, fishing, walking, picnicking and camping. It is popular location for road cyclists.
- The confluence of the rivers and mountains provides a scenic landscape for visitors.
- The Cotter Campground is the ACT's most highly serviced bushland camping area, providing hot showers and sheltered electric barbecues, which will be attractive for many riders.
- Trails in this area provides an attractive extension to Stromlo Forest Park and the Cotter Recreation area.
- Trails in this area will potentially encourage a range of bike-friendly 'pop up' cafes and other services. These services will also potentially benefit other users of the recreation area.
- The Cotter Recreation Reserve offers the potential to be a staging area for a variety of events in the area.
- The Reserve is centrally located between Blue Range Area and Stromlo Forest park offering options for riders to stay a few days and ride the area.

### **Considerations**

- The professionally built trails will embrace sustainable design and management infrastructure.
- ACT Parks and Conservation provide in principle support for trails in this precinct subject to environmental and cultural assessment. An Environmental Significance Opinion (ESO) or Environmental Impact Statement (EIS) would be completed as part of the design phase of the project.
- Conservation objectives of the Murrumbidgee River Corridor are set out in the Management Plan 1998 and seek to ensure protection of river and water quality values.



Figure 10. Overview of the Cotter Recreation Area Trails Precinct Concept Plan

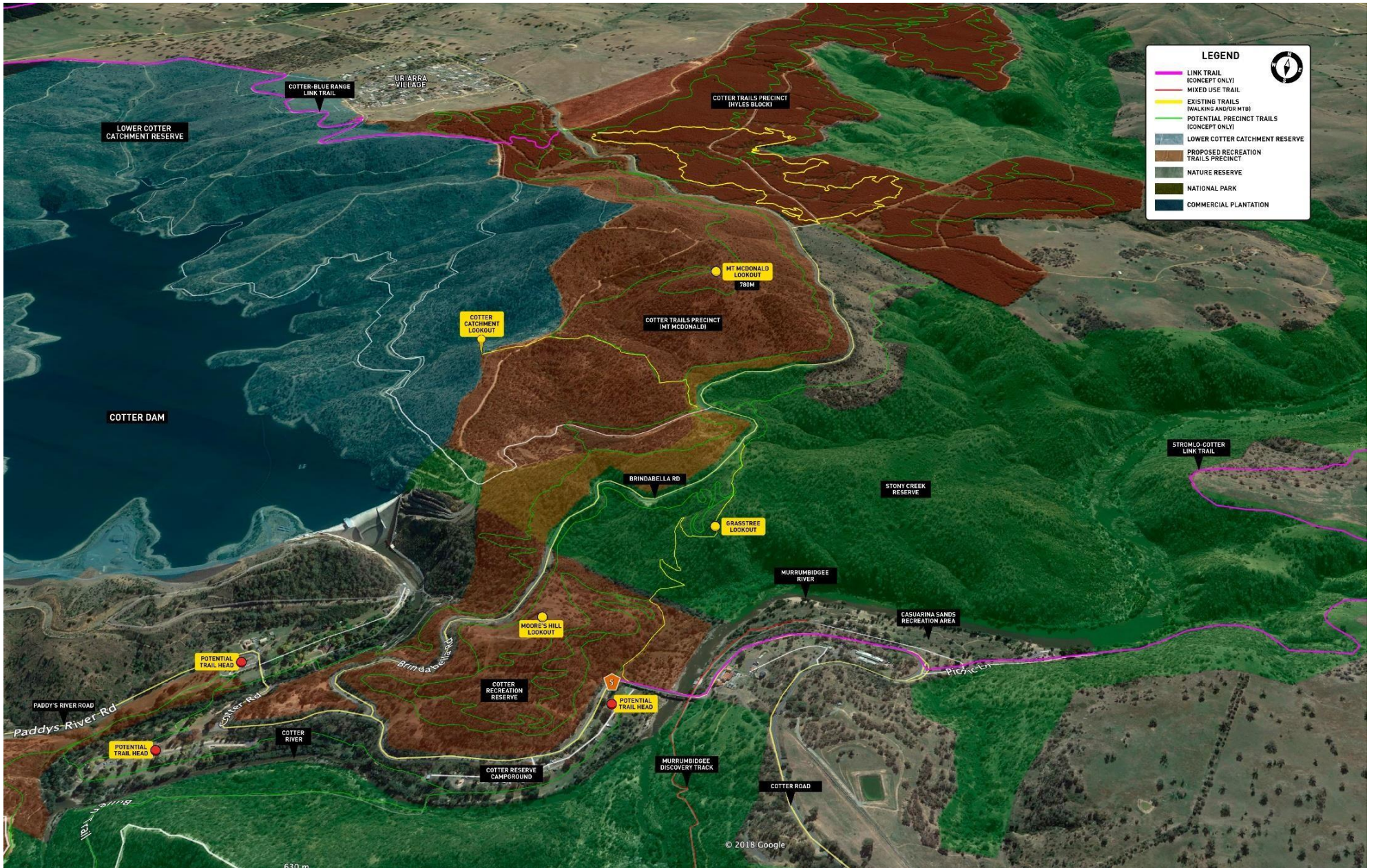
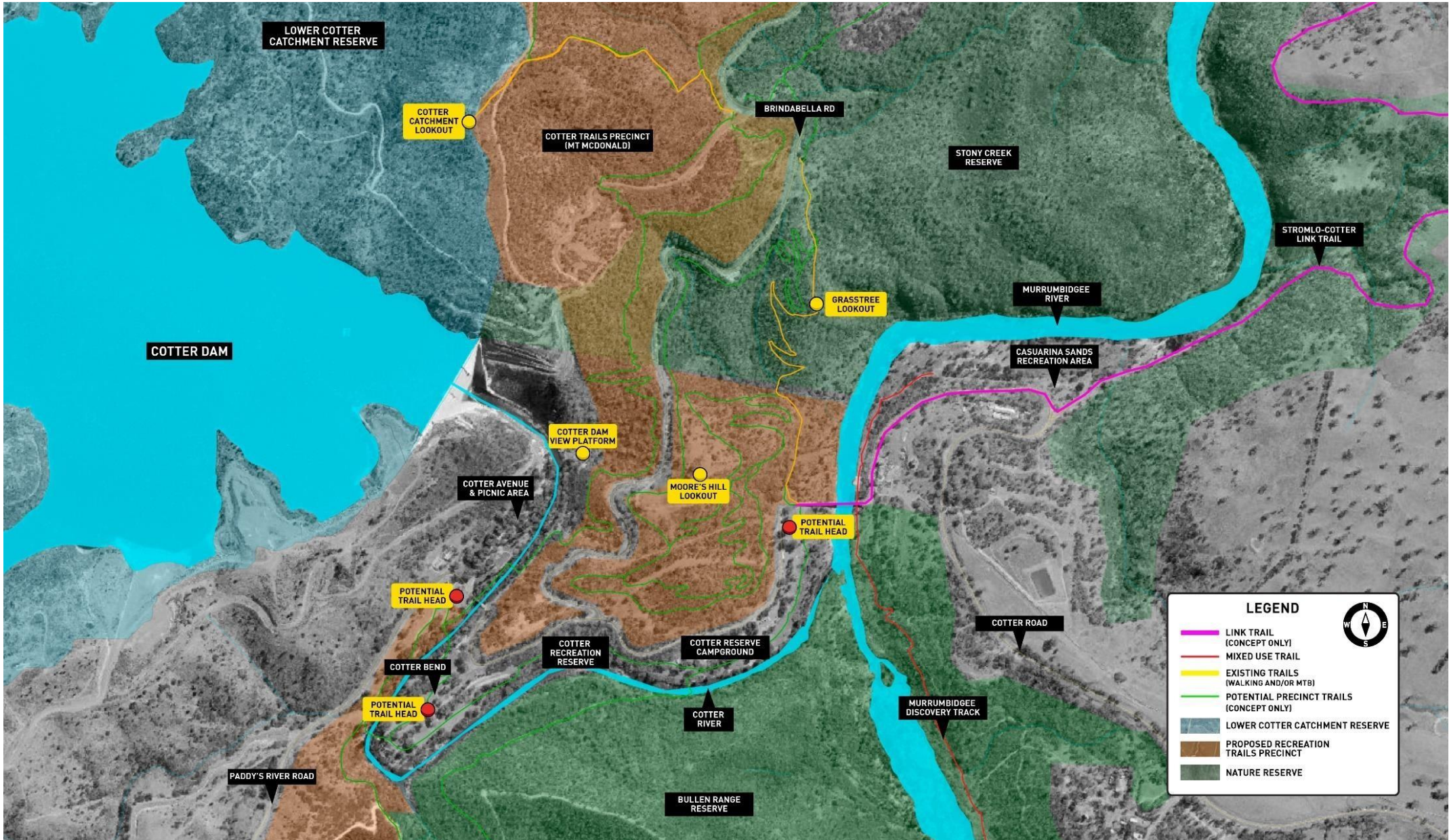








Figure 11. Further Detail - Cotter Recreation Area Trails Precinct Concept Plan





**Table 10. Blue Range Trail Hub Concept Plan**

DESCRIPTION	BLUE RANGE – CROSS COUNTRY, DOWNHILL, GRAVITY ENDURO AND ASPIRATIONAL MOUNTAIN BIKE EXPERIENCE
<b>Difficulty Level</b>	 Easy <hr/>  Intermediate <hr/>  Difficult <hr/>  Extreme <hr/> Suit core and non-core mountain bikers
<b>Approximate Distance of trails</b>	Variable – dependant on type and style of trail to suit a range of users
<b>Trailheads</b>	Blue Range Summit and Blue Range Hut
<b>Key Features</b>	Blue Range Summit and Blue Range Hut
<b>Lowest Elevation</b>	730 metres Blue Range Hut
<b>Highest Elevation</b>	1200 metres at Blue Range Summit
<b>Vertical Elevation Range</b>	Approximately 470 metres Blue Range Summit to Blue Range Hut Approximately 810 metres Blue Range Summit to Cotter Recreation Area
<b>Land Tenures</b>	Blue Range Area - Special Purpose Reserve and Uriarra Plantation Forest Connections to the Blue Range Area from Cotter Recreation Area include Hyles Block Uriarra Plantation Forest, unleased Territory land and Uriarra Plantation Forest. The proposed trails precinct is outside the boundaries of the Cotter Catchment Reserve.

**Description**

Blue Range

- This hub provides the aspirational experience necessary for the ACT to establish itself as an international mountain bike destination.
- A range of trails can be provided within this area with a focus on trails utilising gravity.
- The elevation and the removal of emergent pines provides spectacular views.
- It provides the opportunity for a range of events with up to 500 M vertical decent
- The area has been previously used for mountain biking with the establishment of several trails in the forest area. Several events were also staged from the Blue Range Area. These trails have since been destroyed by fire and vegetation is regenerating.
- Existing management trail provide good access.
- Trail heads would be suitable off the roadsides near the top of the range near the New South Wales border with minor trail heads off the access roads. The trail head at the bottom could be in the area of Blue Range Hut recreation area and near the Brindabella Road.
- The Blue Range Hut provides an attractive base and camping location situated near the bottom of the descent. Toilets, picnic table and BBQs are available.
- The vegetation within the area is a mix of pine plantation native vegetation and emerging pines within the native vegetation. Significant work has been undertaken to clear the post bushfire emerging pines to reduce the fire fuel.
- The most visible signs of this work are the large tracts of naturally regenerating native vegetation. The work does create issues for placement of trails due to large amounts of vegetative debris.

- The downhill mountain bike tracks are likely to traverse native forest and dense pines and would pass through wet gullies where infrastructure would be required to minimise any erosion and protect the habitat values in these sensitive areas.
- Motorised vehicles are not permitted on management trails within this area without a permit (permits only for research and management reasons).

#### Connecting trails - Cotter Recreation Area to Blue Range

- Mountain bikes are permitted on management trails in the Lower Cotter Catchment Reserve providing an opportunity for a connecting trail to run along the management trails in the north of the reserve.
- Options for ascending from the Cotter Recreation Area Hub include modifying the shared use sections of the Stony Creek Lookout Walk or via a new purpose-built trail parallel to Brindabella Road.
- North of the Stony Creek Lookout ascending access would be via more level service tracks to Hyles Block Forest where there is purpose built single tracks under development.
- Within Hyles Block there are opportunities for development of new single track together with existing service roads providing a range of trails suitable for a range of riding abilities and experiences.
- The descent from the Blue Range area and Hyles Block can be provided south of the Brindabella Road within the Mt Macdonald area, outside of the Lower Cotter Catchment Reserve on a mix of service tracks and purpose-built single track.
- Consultation with Uriarra Village residents and other users such as horse riders and walkers will be required to ensure any potential safety concerns are addressed.

#### Rationale

- This area provides excellent topography and attractive forested landscape that will provide aspirational and high-quality riding experiences.
- The area will support a range of Gravity and Enduro events and has good road access.
- The camping area provides good staging area for events as well as camping and other facilities for riders.
- The area offers strong links to a variety of trails on Blue Range, Hyles Block and the Cotter Recreation Area.
- There are minimal land tenure issues and trails can be placed outside of Lower Cotter Catchment Reserve.
- The area provides good opportunity for commercial shuttle services.

#### Considerations

- Slopes are steep and the soils are loose and highly erodible. The professionally built trails will ensure sustainable design and management infrastructure.
- ACT Parks and Conservation provide in principle support for trails in this precinct subject to environmental and cultural assessment. An Environmental Significance Opinion (ESO) or Environmental Impact Statement (EIS) would be completed as part of the design phase of the project.
- Consideration of environmental protection is required particularly in wet gullies and erodible nature of soils on gravity trails.
- Will have to work with post bushfire emerging pines removal as part of fire fuel management program.
- Will require approval for transit connecting trails through Stony Creek Nature Reserve and the Murrumbidgee River Corridor and Cotter Catchment Reserve and Special Purpose Reserve at the top of the Blue Range Area.
- Risk management, rider safety and emergency response are critical considerations for trail use in this area, due to the steep terrain and remoteness of the site.



Figure 12. Blue Range Trails Precinct Concept Plan

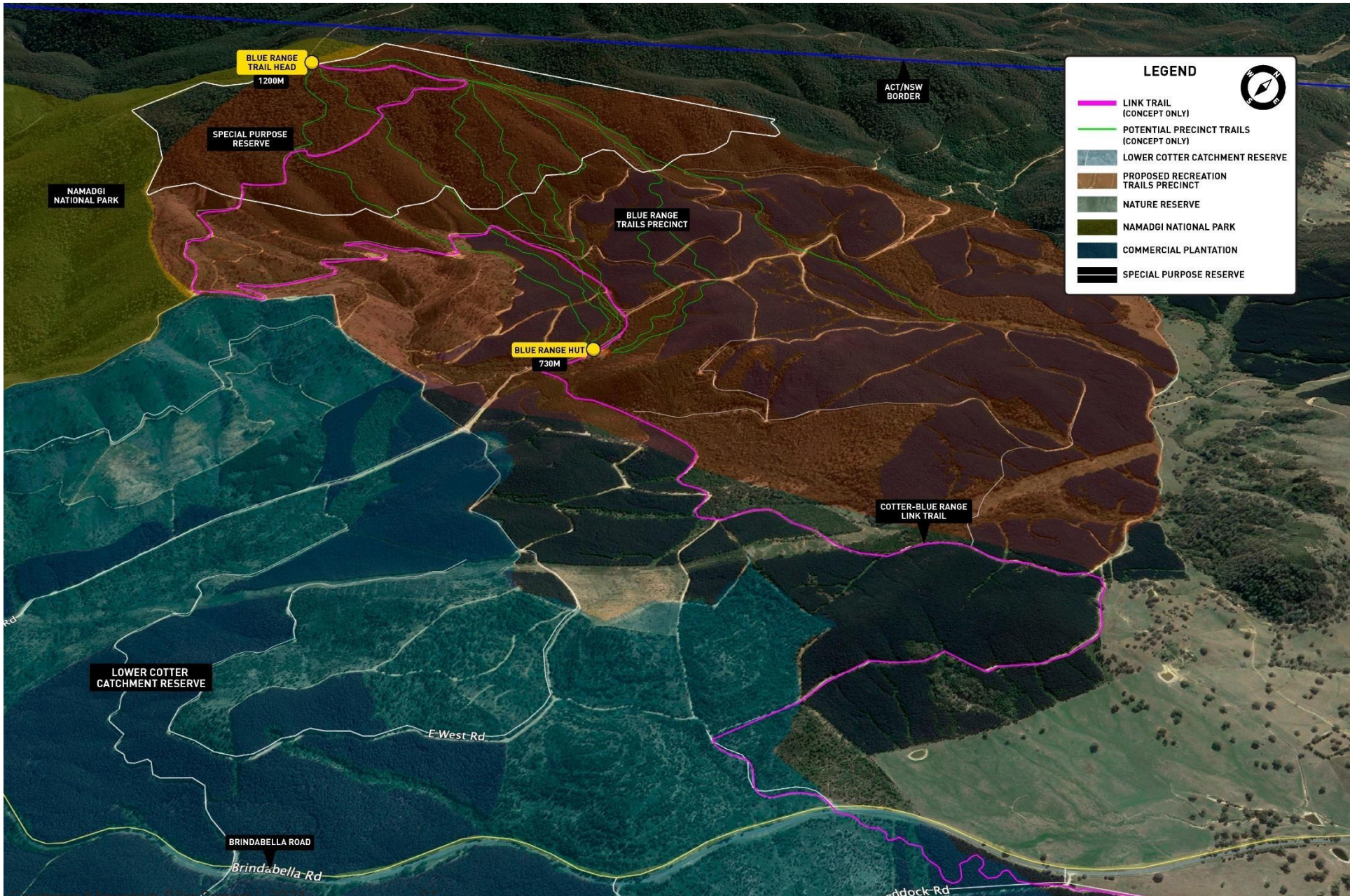
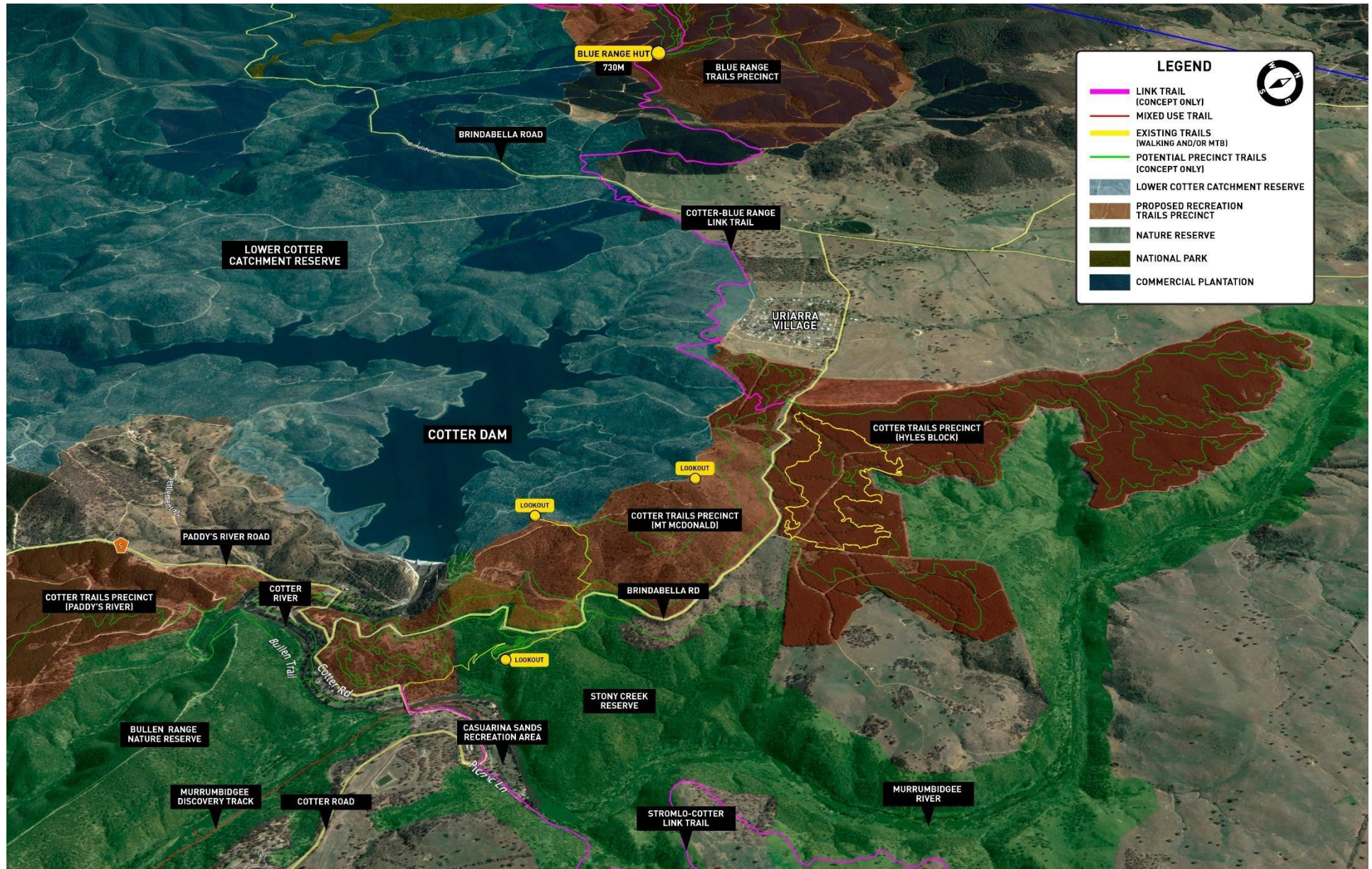




Figure 13. Cotter – Blue Range Link Trail Concept - Cotter Recreation Area, Hyles Block and Blue Range Trails Precincts



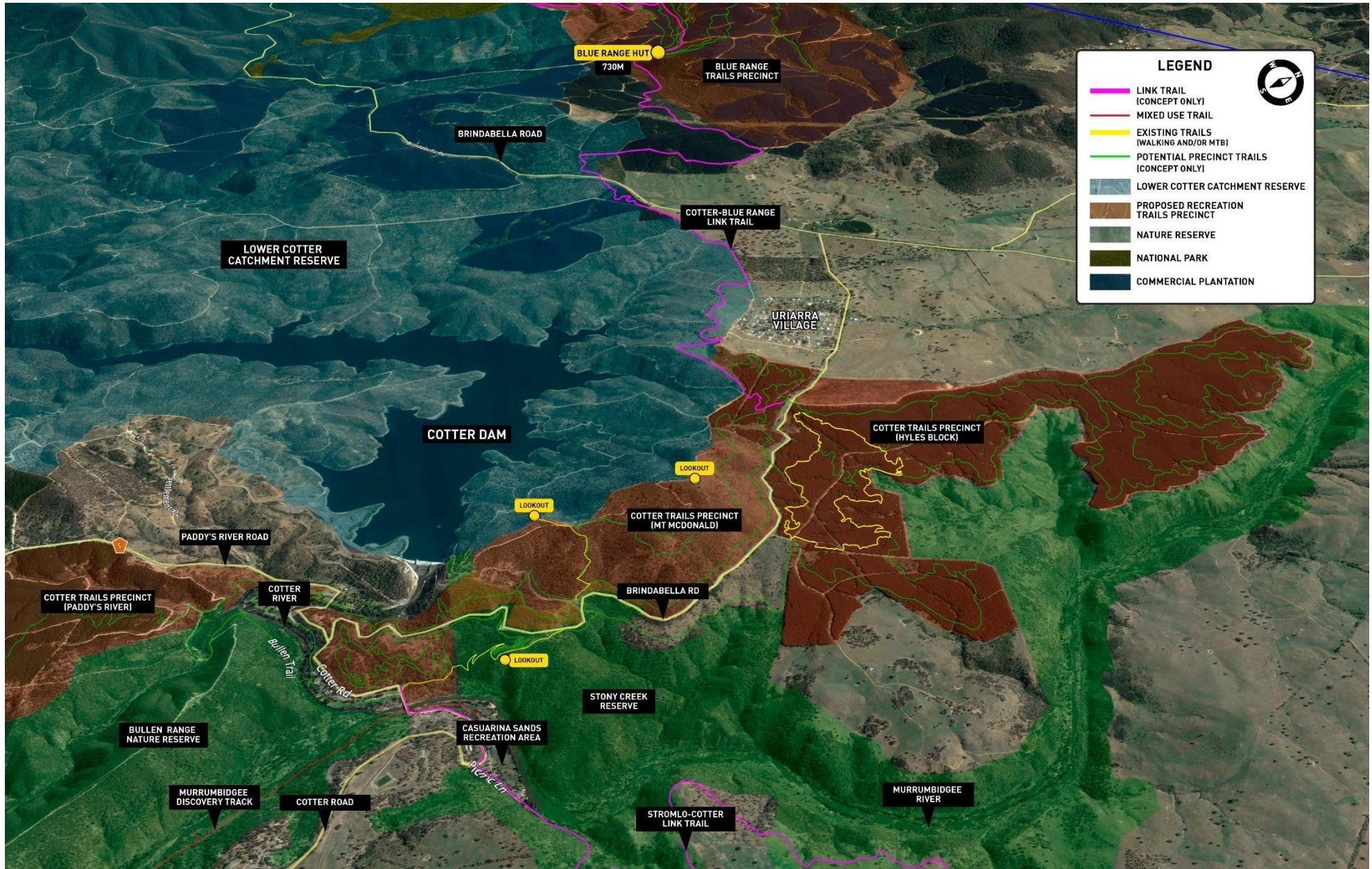


**Table 11. Murrumbidgee Discovery Track – Casuarina Sands to Kambah Pool Concept Plan**

DESCRIPTION	SHARED USE TRAIL RIDING
<b>Difficulty Level</b>	<div style="display: flex; align-items: center;"> <div style="width: 15px; height: 15px; background-color: #008000; border-radius: 50%; margin-right: 10px;"></div>                     Easy                 </div> <hr/> Suit core and non-core mountain bikers
<b>Approximate Distance of trails</b>	14 kilometres
<b>Trailheads</b>	Cotter Recreation Area/Casuarina Sands and Kambah Pool
<b>Key Features</b>	Cotter Recreation Area and Murrumbidgee River Corridor
<b>Lowest Elevation</b>	470 metres Casuarina Sands Recreation Area
<b>Highest Elevation</b>	510 metres Kambah Pool
<b>Vertical Elevation Range</b>	Approximately 40 metres
<b>Land Tenures</b>	Stony Creek Nature Reserve within the Murrumbidgee River Corridor (MRC).
<b>Description</b>	
<ul style="list-style-type: none"> <li>• This segment provides the off-road shared use connection from Cotter Recreation Area / Casuarina Sands to Kambah Pool and the Centenary Trail.</li> <li>• The trail connects via the Murrumbidgee Discovery Track on the eastern side of the Murrumbidgee River. The track is currently for walking only.</li> <li>• The trail is in the Murrumbidgee River Corridor.</li> <li>• The trail would attract a diversity of trail users of all abilities, featuring opportunities for a range of riders and recognising the shared nature of the trail.</li> <li>• The original trail was designed and built for walking and will require further upgrading to accommodate shared use for an easy level of difficulty to attract riders undertaking a loop or connections between Cotter Recreation Area and Canberra via the Centenary Trail.</li> <li>• The trail connects with other trails in this attractive landscape.</li> </ul>	
<b>Rationale</b>	
<ul style="list-style-type: none"> <li>• The trail provides an attractive extension to the ride from Stromlo Forest Park for a range of riders.</li> <li>• The existing facilities in the Cotter Recreation Area will support the experience for visitors with picnic, barbeque, water and toilets for visitors. It provides a range of recreation opportunities including swimming, fishing, walking, picnicking and camping.</li> <li>• Kambah Pool is a popular destination and riders can enjoy the facilities provided for visitors with toilets and carparking.</li> <li>• The trail will connect with the Centenary Trail and the Murrumbidgee Discovery Track from Kambah Pool south to Point Hut Crossing.</li> </ul>	
<b>Considerations</b>	
<ul style="list-style-type: none"> <li>• The existing track will require substantial upgrade and may require re-routing to avoid several gullies.</li> <li>• The trail alignment and construction methodology will be developed with ACT Parks and Conservation Service particularly within areas of conservation significance. Construction techniques for the future shared use trail will need to be considered due to the terrain/slope. The engagement of suitably skilled professional trail builders will be required.</li> <li>• An Environmental Significance Opinion (ESO) or Environmental Impact Statement (EIS) would be completed as part of the design phase of the project.</li> </ul>	



Figure 14. Murrumbidgee Discovery Track and Paddy's River Concept Plan







Credit: Joel Constance - National Arboretum Sunset Rides



# 8 The Investment Strategy

This section establishes the ambition for Canberra to become the mountain bike capital of Australia. It provides the underlying principles, priorities and recommendations to guide investment.

## 8.1 GUIDING PRINCIPLES

The guiding principles for the development and management of mountain biking trails in Canberra are:

### **High quality**

Canberra will offer high quality mountain bike trails, infrastructure and signage. Trails will be designed, constructed and maintained to a consistent quality standard.

### **Inclusive**

Canberra will be a mountain bike destination that has broad appeal and a diverse range of cycling options for people of different capacities and interests.

### **Sustainable**

Mountain bike trails and infrastructure will be financially, socially and environmentally sustainable. All trails will be designed, constructed and maintained to protect the region's environmental and cultural values.

Mountain biking will deliver social, economic and health benefits to the Canberra community.

### **Collaborative**

Success relies on the ACT Government, clubs, volunteers, private sector and indigenous partners working together to build a positive culture for mountain biking.

### **Connected**

Mountain biking experiences are integrated with the broader experiences of Canberra and the region. Mountain biking will reinforce seeing and experiencing Canberra by bike as a core proposition for visitors.

---

## Our Ambition

Canberra will be known as the mountain bike capital of Australia offering a superior trail network with outstanding experiences for visitors and residents.

---

## 8.2 PRIORITIES AND ACTIONS

The priorities and actions focus on the establishment of the ACT as the Mountain Bike Capital of Australia offering a superior trail network with outstanding experiences for visitors and residents. They have been developed to support the CBR Cycle Tourism Strategy.

The priorities and recommendations in this section complement the strategies and actions contained in the CBR Cycle Tourism Strategy.

### PRIORITY 1 - INVEST IN NEW MOUNTAIN BIKE TRAILS AND EXPERIENCES

Investment in an ongoing program of new and enhanced mountain bike trails that excite the target markets to visit the ACT is essential to keep pace with competitor regions and to provide new and interesting trails that entice visitors.

The proposed concepts for new trails (Stromlo - Cotter Link Trail, Cotter Recreation Area and Blue Range) provide the best opportunity to expand and enhance the trail network and position Stromlo Forest Park as the 'gateway' for mountain biking in the ACT. It is the quality and character of these locations that will attract riders and offer 'aspirational experiences' that will define mountain biking in Canberra for visitors. The established camping areas, amenities and picnicking facilities will also support visitors.

#### **Priority 1 - Recommendations**

1.1. Commence detailed trail planning to establish new high-quality sustainable trails in the Cotter Recreation Area and Blue Range Area and associated connecting trails. This will include detailed environmental and cultural assessments of the proposed concept areas and the Stromlo - Cotter Link Trail.

1.2. Commence planning for the development of the Murrumbidgee Discovery Trail (Casuarina Sands to Kambah Pool) to become a shared use trail.



## PRIORITY 2 - INVEST IN EXISTING MOUNTAIN BIKE TRAILS AND EXPERIENCES

This priority is consistent with the CBR Cycle Tourism Strategy that is focused on delivering quality cycling product and providing infrastructure that supports the cycling experience and enhances the cycling culture of the region.

### Supporting Infrastructure

Infrastructure that would enhance the mountain biking experience at the existing trail hubs include:

- Toilets - toilet facilities at central locations
- Water - a water tank or other means of riders accessing drinking water
- Bike wash down facilities
- Lifting and shuttle services
- Refreshments - a kiosk, café or ease of access to other food and beverages
- Consistently branded cycling information boards at all mountain bike hubs and orientation points
- Consistent approach to mountain bike directional signage across all mountain bike parks
- Consistently used safety signage particularly on shared use trails
- Consistently branded visitor information services and collateral.

### Leading and Supporting Hubs

In order to prioritise investment, the ACT's trail hubs can be categorised as leading and supporting hubs. Leading hubs are a small number of outstanding trail hubs prioritised for investment to achieve their greatest potential. These hubs will provide a focus for marketing. They will have the pulling power to persuade a visitor to come to the ACT, and they will generate the greatest economic return. The recommended leading hubs are (i) Stromlo Forest Park (ii) Majura Pines and (iii) Kowen Forest subject to the completion of strategic trail

and forest development plans and (iv) new trail precincts.

Supporting hubs generally have a less prominent visitor offering or potential, but nevertheless can provide a quality visitor experience to support the leading hubs. They also play an important role in extending the length of stay for visitors and offer significant recreational opportunities for local communities. They can be further developed as resources become available. The recommended supporting hubs are Sparrow Hill, Tuggeranong Pines, Zoo Pines, Pine Island, Isaacs Pines and Bruce Ridge.

An ongoing program of works that will keep the mountain bike market segments interested in the region, with a 10-year program of sustainable trail improvements is required. Each leading hub could potentially have an investment project realised on rotation every year.

### Plantation Forests

As the majority of the ACT's trail network is in plantation forest, strategic plans that provide for both harvesting and sustainable trail development are required to protect the benefits derived from both uses. These plans should be developed in collaboration with land managers and trail coordinating groups. The plans should be developed at the same time to allow for ongoing investment across the ACT trail network, recognising that some networks may be unavailable for riding during certain periods due to harvesting activities. This approach is also important for the ongoing development and staging of events in these areas, providing certainty to event operators that the trail hubs will be available.

### Food, Beverage, Accommodation and other services

The CBR Cycle Tourism Strategy recognises the importance of complementary food, beverage and accommodation product is continuously developed in the region to meet cycle tourism market needs and expectations. Quality food, beverage and accommodation delivered by the

private sector is essential for attracting cycle markets, generating yield and ensuring visitors return.

There are several small and medium scale private sector investors that have identified interest in establishing new accommodation, food and beverage products to support mountain biking. In order to deliver on these opportunities preliminary work needs to be undertaken including market sounding, business case development and direct investment attraction, like the process that has been undertaken for Stromlo Forest Park.

## **Priority 2 – Recommendations**

2.1 Work with stakeholders to design a phased and prioritised approach to trail development and supporting infrastructure for leading and supporting hubs. This will include implementing existing trail plans that incorporate recommendations from this report and supporting infrastructure needs.

2.2 Develop strategic plans for harvesting and trail development in plantation forests to provide certainty for ongoing investment in the trail network and the hosting of events.

2.3 Develop consistently branded cycling information boards at all mountain bike hubs and orientation points.

2.4 Develop a consistent approach to mountain bike directional and safety signage across all mountain bike parks.

2.6 Undertake market sounding and direct investment attraction for leading trail hubs to provide a service for visitors that will enhance their experience.

## **PRIORITY 3 - POSITION CANBERRA AS AUSTRALIA'S MOUNTAIN BIKING CAPITAL**

This report supports the ambition of the CBR Cycle Tourism Strategy which is to establish Canberra and the region as Australia's cycling destination of choice.

An assessment of the ACT's mountain biking offering against other successful mountain biking destinations shows that the ACT has the potential to achieve the standards expected of a world class mountain biking destination.

Positioning Canberra as Australia's mountain bike destination is achievable with the right investment and leadership together with recognition from influencers such as IMBA.

### **Seek IMBA Ride Centre Status**

IMBA recognition can enhance the reputation of a mountain biking area through its global network. IMBA Ride Centres are recognised by IMBA under a three-tier scheme (Gold, Silver and Bronze) for the outstanding range, variety and quality of the riding experience. This designation is designed to support local stakeholders and land managers in their efforts to create high quality mountain biking destinations. The designation is just as much about the process as the award itself. The designation and rating (and potential delisting or demotion) of a Ride Centre is based on clear criteria that include, but not are limited to: Trail Experiences, Services, Community Involvement, Tourism, Promotion, Marketing, Evaluation and Measurement.

There are only forty IMBA centres around the world. Australia has one IMBA ride centre at Mt Buller, Victoria which is rated as Bronze.



A preliminary assessment undertaken by CORC suggests that the ACT is well placed to become an IMBA Ride Centre, with potential for gold status subject to the development of the following:

- Long climbs with a minimum average grade of 7% and a maximum sustained grade of 20%
- Three or more days of riding
- Improved trail marketing and promotion
- Improved trailhead infrastructure
- Long distance adventures and backcountry experiences
- Data capture and evaluation.

### **Priority 3 – Recommendations**

3.1 Pursue IMBA Ride Centre Bronze level designation when trail development, facilities and services match the prerequisite IMBA criteria as a stepping-stone to pursue Gold status.

3.2 Identify areas that require improvement and undertake actions within the framework of the Canberra Mountain Bike Report.

3.3 Incorporate IMBA status into brand strategy and positioning as Australia's Mountain Biking Capital.

## **PRIORITY 4 - CO-ORDINATE MARKETING AND PROMOTION TO OPTIMISE VISITOR AWARENESS OF THE NEW AND ENHANCED MOUNTAIN BIKING EXPERIENCES**

The CBR Cycle Tourism Strategy recommends a five-year marketing plan for cycle tourism in the ACT and region be prepared. The marketing and promotion of mountain biking will be a critical component of this strategy to drive current and potential market segments from awareness through to inspiration and finally conversion – to generate mountain biking tourism and yield opportunities for the ACT.

## **Positioning the ACT as Australia's Capital of Mountain Biking**

Positioning the ACT as a world class mountain bike destination will only be achieved in partnership with Visit Canberra and industry. This will involve integrating mountain bike experiences with other offerings as well as direct marketing to core mountain bike riders.

A consistent brand identity will be important to the long-term promotion of the trail offering. A brand is not the logo chosen to represent a product, destination or an idea. It is the collective understanding of the target audience of what the words, images and logo means. Starting with the consistent use of the destination name will be a huge first step. Then as the brand builds interest and awareness, the creation of a unique 'signature' for the destination will help others to recognise and connect with the brand.

The provision of accessible and effective trail information is an essential part of the development and provision of trails in the future.

In the short to medium term this may be done through the development of an effective web-based tool which prospective trail users can use as a gateway to trail opportunities. Information on individual trail systems or trails including how to get there, maps of the trails, distances, grades and other more specific information will be readily available for visitors.

The CBR Cycle Tourism Strategy recommends attracting and supporting mountain bike cycling events in line with the 2025 Major Events Strategy for the ACT. This report supports that recommendation as a critical component of marketing Canberra's mountain bike offering to domestic and international visitors.

#### **Priority 4 - Recommendations**

4.1 Work with Visit Canberra on the CBR Cycle Tourism marketing strategy. Develop a Mountain Bike Capital of Australia brand, and position statement as part of the strategy.

4.2 Establish a website providing comprehensive information on mountain biking in the ACT. The website could potentially include transport and access information, trail details, maps, safety information, events and links to cycle friendly accommodation, tour operators, and attractions.

4.3 Continue to attract national and international events as part of the 2025 Major Events Strategy.

4.4 Work with business and event organisers to encourage, sponsor and coordinate events in seasonal off-peak periods and strengthen visitation throughout the year.

#### **PRIORITY 5 - ESTABLISH A SUSTAINABLE MANAGEMENT MODEL**

The merits of a sustainable management model for mountain biking in the ACT is outlined in Section 9. This is considered a high priority and critical to the success of establishing Canberra as a mountain bike destination of choice. The importance of good governance is highlighted in the CBR Cycle Tourism Strategy and is recognised as an important feature of the implementation of the strategy.

Effective governance and management of each trail network is required to implement this report, pursue funding and resources and facilitate collaboration between partners and stakeholders. Depending on the location, management arrangements will need to have the capacity to handle cross-tenure trails, trail development approval processes and risk management. There will also need to be mechanisms in place to coordinate partnerships (such as commercial operators, accommodation, other attractions, events, marketing and promotion) to ensure they are consistent in the delivery of the mountain biking experience in the ACT.

#### **Priority 5 - Recommendations**

5.1 Establish a skills-based group to discuss the most appropriate governance structure to implement this Report and develop Canberra as the ride capital of Australia. The preferred governance model should allow for:

- Leadership and direction for the trail network, the ability to seek resources for investment and advise ACT Government on the development of mountain biking
- Consistent and collaborative planning to provide consistent standards to design, construction, trail classification and risk management
- Sustainable management, maintenance and monitoring to ensure continued environmental, cultural and social sustainability and an effective control environment is in place to reduce risks
- Support for community involvement including support for the work of volunteer trail groups, indigenous partners and encouraging trail use through programs and events
- Marketing and communication to ensure effective ways to reach tourism markets.

5.2 Identify and develop funding models and business cases which will create ongoing operational sustainability for the preferred management group.

5.3 Seek funding through grant opportunities for tourism, infrastructure and community health to support the development Canberra's trail network.

5.4 Develop & implement a Communications Plan to assist uptake and ownership of initiatives stemming from the Canberra Mountain Bike Report

5.5 Ensure the Canberra Mountain Bike Report is adequately referenced in relevant future strategic planning documents including tourism strategies etc.

5.6 Undertake trail use monitoring to measure return on investment.



**Table 12. Summary of Priorities and Recommended Actions**

Priority	Recommendations	Implementation Immediate = 1 year Medium = 2-4 yrs Longer = 4-5 yrs	Responsibility	Indicative Cost
<b>1. Invest in New Mountain Bike Product and Experiences</b>	1.1 Commence detailed trail planning to establish new high-quality sustainable trails in the Cotter Recreation Area and Blue Range Area and associated connecting trails. This will include detailed environmental and cultural assessments of the proposed concept areas and the Stromlo - Cotter Link Trail and further consultation with trail users and Uriarra Village community relating to trail use in the area.	IMMEDIATE	PCS	\$250,000
	1.2 Commence planning for the development of the Murrumbidgee Discovery Trail (Casuarina Sands to Kambah Pool) to become a shared use trail.	IMMEDIATE	PCS	\$50,000
<b>2. Invest in Existing Mountain Bike Product and Experiences</b>	2.1 Work with stakeholders to design a phased and prioritised approach to trail development and supporting infrastructure for leading and supporting hubs. This will include implementing existing trail plans that incorporate recommendations from this report and supporting infrastructure needs.	IMMEDIATE	PCS and trail groups	Internal resources
	2.2 Develop strategic plans for harvesting and trail development in plantation forests to provide certainty for ongoing investment in the trail network and hosting of events.	IMMEDIATE	PCS and trail groups	Internal resources
	2.3 Develop consistently branded cycling information boards at all mountain bike hubs and orientation points.	IMMEDIATE	PCS and trail groups	\$100,000
	2.4 Develop a consistent approach to mountain bike directional and safety signage across all mountain bike hubs.	IMMEDIATE/ MEDIUM	PCS and trail groups	\$100,000
	2.5 Undertake market sounding and direct investment attraction for leading trail hubs to provide services for visitors that will enhance their experience.	MEDIUM	PCS	\$50,000

Priority	Recommendations	Implementation Immediate = 1 year Medium = 2-4 yrs Longer = 4-5 yrs	Responsibility	Indicative Cost
<b>3. Position Canberra as Australia's Mountain Biking Capital</b>	3.1 Pursue IMBA Ride Centre Bronze level designation when trail development, facilities and services match the prerequisite IMBA criteria as a stepping-stone to pursue Gold status.	IMMEDIATE	PCS / CORC/ industry stakeholders	Internal Resources
	3.2 Undertake actions as required within the framework of the Canberra Mountain Bike Report.	IMMEDIATE	PCS (Government/ CORC/industry stakeholders)	As per other actions
	3.3 Incorporate IMBA status into brand strategy and positioning for Canberra as Australia's Mountain Biking Capital.	MEDIUM	Visit Canberra	As per marketing actions
<b>4. Co-ordinate marketing and promotion to optimise visitor awareness of the ACT's new and enhanced mountain biking experiences</b>	4.1 Work with Visit Canberra on the CBR Cycle Tourism marketing strategy. Develop a Mountain Bike Capital of Australia brand, and position statement as part of the strategy.	IMMEDIATE	Preferred management group	\$80,000
	4.2 Establish a website and mobile apps providing comprehensive information on mountain biking in the ACT. The website and apps could potentially include transport and access information, trail details, maps, safety information, events and links to cycle friendly accommodation, tour operators, and attractions.	MEDIUM	Visit Canberra	\$50,000
	4.3 Continue to attract national and international events as part of the 2025 Major Events Strategy. Work with commercial operators and volunteer groups to support the hosting of events.	MEDIUM	Preferred management group	Internal resources
	4.4 Work with business and event organisers to encourage, sponsor and coordinate events in seasonal off-peak periods and strengthen visitation throughout the year.	MEDIUM	Visit Canberra	Internal resources



Priority	Recommendations	Implementation Immediate = 1 year Medium = 2-4 yrs Longer = 4-5 yrs	Responsibility	Indicative Cost
<b>5. Establish a Sustainable Management Model</b>	5.1 Establish a skills-based group that includes indigenous representatives to discuss the most appropriate governance structure to implement this report and develop the ACT as the ride capital of Australia.	IMMEDIATE	PCS and trail groups	Internal resources
	5.2 Identify and develop funding models and business cases which will create ongoing operational sustainability for the preferred management group.	IMMEDIATE	PCS and trail groups	Internal resources
	5.3 Seek funding through grant opportunities for tourism, infrastructure and community health to support the development of the Canberra's trail network.	IMMEDIATE/ MEDIUM	Preferred management group	Internal resources
	5.4 Develop & implement a Communications Plan to assist uptake and ownership of initiatives stemming from the Canberra Mountain Bike Report	IMMEDIATE/ MEDIUM	PCS	Internal resources
	5.5 Ensure Canberra Mountain Bike Report is adequately referenced in relevant future strategic planning documents including tourism strategies etc.	IMMEDIATE/ MEDIUM	PCS	Internal resources
	5.6 Undertake trail use monitoring to measure return on investment.	IMMEDIATE/ MEDIUM	PCS and trail groups	\$20,000 for initial outlay \$10,000 per annum thereafter





Credit: Richard Perry – Dad and son on Duffy's Descent at Stromlo Forest Park



# 9 A Sustainable Management Model for the ACT

Effective governance is one of the central pillars that will help the ACT establish itself as an international mountain bike destination. This section provides a discussion on governance and presents options for consideration.

## 9.1 THE IMPORTANCE OF EFFECTIVE GOVERNANCE

An effective governance model across the whole trail network will be required to establish Canberra as a mountain bike destination of choice. The most successful management models for trail networks across Australia and New Zealand have the following characteristics:

- Governance and accountability is clear and simple to initiate and administer over the longer term
- The strengths and expertise offered by each partner in the model are recognised and the preferred model allocates responsibilities and authority accordingly
- The visitor experience and presentation of the trail network are substantially improved or continually improving, and the new model facilitates commercial tourism positioning, product development and marketing
- The trails are supported by a range of funding sources with a revenue raising mechanism to enhance cash flow to enable self-generated investment into facilities, assets and services
- An effective control environment is in place to reduce risks (to staff, volunteers and visitors) and each agency's operations are not adversely affected (i.e. there is no dilution of effectiveness)
- The benefits of the new model are visible to the community and it is inclusive of user and community groups.

## 9.2 FEATURES OF EFFECTIVE TRAIL GOVERNANCE

### **A clear, committed and skilled governance entity**

Trails that realise their potential and operate sustainably over time tend to have governance entities with:

- a clear mandate for trail development and provision of leadership and vision
- a clear statement of roles and responsibilities of the various parties involved in the governance structure and in management tasks
- the skills and experience relevant to leadership and effective decision-making related to the trail and governance tasks
- arrangements/agreements at an organisational level with any agencies tasked with trail management and maintenance.

### **Effective trail planning**

Strategic planning by the trail governance entity for development and operation of the trail over time is important to provide a consistent direction, identify objectives, provide strategies to address issues and achieve objectives, identify investment needs and define roles and responsibilities. Where trails are developed in stages dependent on the availability of funds, a strategic plan, master plan or business plan will provide clarity on future funding needs.



### **Clear coordination function**

Where trail governance and management involve multiple partners, there needs to be clear allocation of coordination responsibility. There needs to be an organisation, group or person that can drive an integrated and consistent approach to trail management, follow up on tasks and planning priorities, and report to the governance entity on progress.

### **People resources dedicated to management**

Trail management requires people resources to provide executive support to, and implement the decisions of, the governance body (whatever its structure); oversee implementation of actions in trail plans; and coordinate activities by other agencies and stakeholders.

### **Adequate resources for trail operations**

Operating a trail entails a host of tasks that impinge on land management and may include:

- Infrastructure maintenance and repair (trail surfaces, signage, parking areas, amenities, waste management)
- Environmental management – erosion and runoff control, vegetation management, weed and pest control, significant species protection and fire management which will have associated legislative requirements
- Emergency management – emergency access provision, issue of emergency notices (such as for fire, flood) and trail closures
- Visitor management – overseeing compliance with any use requirements, management of trail events.

### **Access to ongoing funding**

Trail development and maintenance and supporting infrastructure requires access to financial resources.

The lack of funding and a high reliance on government grants has characterised the development of many trails in Australia, including trails in the ACT. Trail development often occurs in a 'stop-start' sequence dependent on successful grant applications and in some cases, there has been limited provision of funds for future management and maintenance, leading to heavy reliance on volunteers.

Government policies, plans and programs that encourage and support trails and identify trail investment priorities have been important for the funding of trail development and management. Ideally, trail governance entities need to have the skills and resources to leverage such potential opportunities offered by a supportive government environment in applying for grant funding. They also need to have business skills to develop commercial opportunities to generate revenue and support infrastructure development.

### **Stakeholder and community partnerships**

The mechanisms used for involving the community, business and tourism stakeholders in trail development and visitor experiences vary widely and include:

- Representation on governance boards, steering or advisory groups
- Coordination groups such as the Majura Pines Trails Alliance
- Friends groups, which serve as a focus for community stewardship, volunteering and donations
- Liaison with local user and health groups and organisations to develop opportunities for local people, health and exercise initiatives and events
- Schemes to encourage tourism operators to provide trail-related products and services – such as the Bibbulmun Track Foundation's Walker Friendly Business Program and the Queenstown Trails Trust's Official Partners Program.

### **Marketing, promotion and experience development**

Understanding a trail's current and potential markets is an important part of trail business – it assists promoting and developing the right products and services for visitors.

## Monitoring and evaluation frameworks

Monitoring and evaluation are essential elements of good governance and good management, but ones often overlooked. Elements that may need to be monitored include:

- Visitor numbers and expenditure patterns to determine the cost effectiveness and profitability of the trail hub/destination
- Types of visitor – are the markets targeted responding to the information and types of experiences offered?
- Visitor satisfaction including areas for improvement of the products, services and experiences had in the destination (these can be periodic)
- Environmental performance – is the trail development supporting strong environmental stewardship or is it having some consequence to strong environmental performance on site?
- How is the trail supporting good economic outcomes in the business and broader community surrounding the hub or destination?

### 9.3 DIFFERENT MODELS OF MANAGEMENT

There is no one governance model that suits every destination and each model has its advantages and disadvantages. The models fall into three broad categories:

#### Option 1: Sole Agency Management

This model essentially provides for the one authority to utilise the land they are individually responsible for or licenced to use for trail development and use. There is no sharing of accountability and user groups are allowed or supported to volunteer their services. This model applies to the mountain bike trails generally built on one land tenure, and not involving community or business directly (and in some cases indirectly).

In this example, marketing is generally undertaken by the agency although some external marketing through mountain bike clubs or third-party websites such as Trail Forks may occur.

Visitor servicing is also generally directly undertaken by the management agency although in some cases, this may fall to the local clubs who are permitted to use the land for mountain biking purposes.

#### Option 2: A Public/Private Partnership Structure

This model would see a greater role for user groups in a partnership with ACT Government. This model provides for the land manager to focus on core business (parks and reserves and forestry operations) and remain a partner in the development of the trail network. Several variations to this model can occur including the development of a Memorandum of Understanding (MOU), the expanded roles of Trust models and reducing the number of authorities involved through contracts or other models.

If a partnership is the appropriate model – there are several mechanisms in which this can occur. These are broadly described below:

#### A Memorandum of Understanding (MOU)

Generally applied to less formal arrangements where coordination and sharing tend to be the higher order functions for the partnership. This model can best be applied when one dominant land manager occurs. For example, if 70% of all trails are in ACT Forest, and 30% is ACT Government leased land, an MOU may be developed to allow one partner to manage with support and input from other partners.

#### An Incorporated Association

Incorporated Associations are created and administered under the ACT Associations Incorporation Act 1991. They must have a minimum membership, become a legal person that can enter contracts and can sue or be sued.



This form of partnership has advantages and disadvantages. Incorporated Associations are usually only used in complex situations where land managers, trail users, governments and businesses seek to develop a formal partnership. It can also bind members to a set of rules commonly known as a constitution

### **Delegation and Volunteerism**

This model applies to land managers who are comfortable delegating the running, operations, maintenance or other elements of the trail destination to a voluntary group. In some instances, these are established through formal agreements. The trails must be free to the community and the club must be affiliated with Mountain Bike Australia (MTBA).

### **Option 3: Private Arrangements**

This model would potentially see one entity take management control of the trails, raises the necessary funding to operate, market and maintain the trails and puts management control and authority in one entity. This usually occurs on private land.

Appendix E provides examples of some trail governance arrangements under each of the categories.

## **9.4 CRITERIA FOR DETERMINING THE RIGHT MODEL FOR CANBERRA**

Trail managers and developers have a range of options to consider when developing the most appropriate governance arrangements for their trails. The following questions may help the ACT Government and its stakeholders consider the best model for their circumstance, noting that most mountain bike developments have their own nuances to be considered. The questions to be answered are:

- Does the model provide the simplest and clearest governance for the land tenure and purpose of the trail destination?
- Are the accountabilities clear for the land manager and entity governing the users?
- Is the proposal legal and allowed for under ACT legislation, regulation and policy?

- Does the proposed model maximise the partnership opportunities with other organisations where it adds value?
- Will the new model provide the optimal visitor servicing for the markets chosen?
- Does the model maximise the commercial viability of the proposed mountain bike hub, noting the need for ongoing maintenance and income for growth?
- Does the model allow for community input and engagement and does it allow for community volunteerism?
- Does the model reduce duplication and uncertainty?
- Does the model provide a suitable mechanism for managing risk including safety?

Answering these questions will enable managers and stakeholders to work logically through the process of determination of the best model for their circumstances. Various governance models are available in the ACT and some are better suited to the circumstances than others.

## **9.5 A PREFERRED MODEL OF MANAGEMENT**

The recommended model for governance of the Canberra Trail network is one which recognises the existing stakeholder groups and their significant knowledge and expertise on trail development.

It is recommended that a skills-based group be brought together as a Trust or other incorporated body. This group would ensure collaborative leadership in the development of the new trail experiences and assist with the ongoing management and development of the leading and supporting hubs. It will also be instrumental in seeking commercial investment, resources from grant opportunities and through ACT Government budget allocations.

This model would see a greater role for user groups in a partnership with ACT Government. It provides for the land manager to focus on core business (parks and reserves and forestry operations) and remain a partner in the development of the trail network. An example of where this model is in place is Rotorua and is presented in detail in Appendix E.



Credit: Leena Cavenagh - Afternoon on the Old Boboyan Road



# 10 Benefits of Investment

Mountain biking plays an important part in community health and wellbeing by improving the liveability of communities and providing prospective visitors with a reason to visit and stay. They also generate economic and commercial benefits and opportunities for new jobs within the visitor economy, as well as environmental benefits such as reducing car use and contributing towards the ACT Government's net zero emissions target.

A high-level economic analysis of the potential impact of an increase of cycling to Canberra indicates that targeted trail development has the potential to introduce 10,000 to 20,000 new visitors per annum to the local area (dependent on the scale of investment)<sup>20</sup>. The base economic benefit using the above rationale of 10,000 people per annum, staying for one two-day stay, would be \$3.2 million per annum; or at 20,000 visitors \$6.4 million per annum.

The CBR Cycle Tourism Strategy 2018 suggests that by 2030 visitor stays in the ACT could be extended to participate in recreational and trail cycling. The impact of staying an extra day could be more than \$60 million per year by 2030. In addition, an extra two community cycling events could generate around \$2 million per year by 2030 based on current event participation numbers. Job impacts of a cycling culture in the ACT could range from jobs in retail and accommodation in the order of around \$3.6 million per year by 2030.

Canberra is well placed to provide high quality cycling experiences and become the cycling capital of Australia. It is estimated that if the ACT can increase visitation by just 1.1% a year through cycle tourism, the cumulative economic benefit is likely to exceed \$400 million by 2030. Establishing the Canberra as Australia's capital of mountain biking will contribute significantly to that goal.

The main benefits can be summarised as follows:

## Community and Social Benefits

providing opportunities for families and friends to enjoy time together and enhancing quality of life.



## Educational Benefits

providing an outdoor classroom for physical activity, sport, nature, culture and history.



## Health and Fitness Benefits

improved health and physical well-being for both individuals and communities, reduced health care costs and enhanced productivity.



## Economic Benefits

increased tourism revenues, greater business investment and enhanced property values.



## Environment Benefits

enhanced environmental awareness, improved understanding of our natural heritage and stewardship of the environment.



## Heritage and Cultural Benefits

recognition and respect for Aboriginal culture and historical values.



<sup>20</sup> CBR Cycle Tourism Strategy, ACT Government 2018



## 10.1 INVESTMENT ATTRACTION AND REGIONAL STIMULUS

Increased visitation and expenditure in the region as a result of investment in Canberra's trail network is likely to attract further investment. The trail network presents an opportunity for entrepreneurs to develop products and services to meet the needs of visiting riders. This could include transport, merchandise, accommodation, food and beverages, and other ancillary services.

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

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



In addition to tourism related economic benefits there are also direct flow-on effects of mountain biking for bicycle retail and wholesalers, bicycle mechanics, clothing and equipment manufacturers, trail designers and builders, coaches and instructors, event management groups and support services, shuttle and tour services, and mountain biking media companies. Commercial opportunities that have proved successful elsewhere include:

<b>OPPORTUNITY</b>	<b>DELIVERY</b>
<b>Bike shops and repairs</b>	Especially near trailheads. They may not sell many bikes, but accessories, consumables, repairs etc. are critical for visiting mountain bikers.
<b>Shuttle services</b>	In areas with good vertical elevation and gravity trails, riders will happily pay for comfortable and reliable transport to the top of the hill and back to carparks/accommodation.
<b>Coffee</b>	Bike riders of all disciplines love a good coffee shop. The closer to the trailhead, the better.
<b>Bike hire</b>	Most core mountain bikers are inclined to bring their own bikes, but there is still a good market segment of non-core riders looking to hire good quality mountain bikes.
<b>Guided tours and mountain bike tuition</b>	This opportunity doesn't have huge appeal for core mountain bikers, but it can be an excellent way for non-core mountain bikers to try the sport. Also a great way for supporting solo traveller, small and large group activities, including school groups.
<b>Bike Friendly services</b>	Accommodation, cafes/coffee shops, places for bike service and repair.
<b>Accommodation</b>	Mountain bikers cover a wide spectrum of incomes and have wide ranging expectations for accommodation. Anyone that can cater towards cycling somehow in their accommodation offering will have a competitive advantage. This can be as simple as providing secure bike lock up facilities
<b>Food and Beverages</b>	There appears to be a growing overlap with boutique food and beverage tourism segments. Breweries and wineries are popular with mountain bikers, with the increasing establishment of gourmet trails in picturesque and rural settings.
<b>Groceries and other travel needs</b>	During travel, visitors require basic grocery and sundries. There are opportunities to provide on trail or close to trail and trail hub conveniences.
<b>Medial, physio and massage services</b>	Provision to ensure ongoing health and wellbeing benefits for riders, particularly those on holidays who wish to incorporate adventure and relaxation into their travels.
<b>First aid and on-trail support assistance</b>	Like on-trail first aid and operational support provided at ski fields, there are opportunities during peak seasons and events to offer this level of support on mountain bike trails.
<b>Other entertainment services and or experiences</b>	For many riders, the trail is only one component of the overall experience. Riders are also looking for complementary activities and experiences that become a part of the overall journey. In addition, during events or when family and friends are travelling to support core riders, providing additional activities and experiences for non-riders will keep them engaged and, in the region, longer.





Credit: Marilla Cavenagh - Ladies day out



# 11 Conclusion

The ACT's scenic landscapes, varied terrain, natural and cultural tourism attractions provide a strong basis for establishing Canberra as Australia's capital of mountain biking.

Investment in the trails network will provide a major tourism and recreational product of national significance, capable of generating new and complementary tourism investment and contributing to the ACT's economic growth.

The short to medium term benefits that are likely to arise from the development of the trail network are:

- Investment in the trail network and related businesses
- Increased complementary benefits for the community in terms of recreation, health, social benefits
- Diversification of the ACT's tourism product mix
- Increased awareness of the ACT through branding and marketing
- Greater attraction of a high value and fast-growing segment of the visitor market

Longer term benefits will be:

- Increased employment and economic development opportunities for the ACT economy
- Enhanced reputation as a tourism destination and international mountain bike destination.







Appendices



## A. APPENDIX: CONSULTATION SUMMARY

Three workshops were held with the Canberra Community to discuss the Canberra Mountain Biking Report. 100 people participated in the workshops. Workshops were held at the following locations to provide the opportunity for residents on the north and south side of Canberra to attend.

- Tuesday 30 July, Ainslie Football Club (55 participants)
- Wednesday, 31 July 2019 Weston Creek Labor Club (29 participants)
- Wednesday 7 August 2019, Ainslie Football Club (16 participants)

This report provides an analysis of the feedback provided by participants at all three workshops.

### METHODOLOGY

A short presentation was provided by the consultants on mountain bike tourism and considerations for planning. Participants were then invited to participate in an online interactive survey (Mentimeter<sup>21</sup>). The short survey consisted of the following questions:

- Why do you love riding in Canberra?
- What kind of rider are you?
- What are Canberra's strengths as a MTB Destination?
- What are its distinctive features?
- Do you think Canberra could become a national/international destination for MTB?
- Where are the gaps and weaknesses?
- Existing trails - where would you invest?
- New trails – what are your ideas?

Feedback on the survey results was given to the group which generated a discussion. Participants were then asked to discuss amongst their group (table) the following questions:

- What improvements need to be made to the current experience?
- If there were to be new trails - where could they be located?

Maps of the trail network in the ACT were provided to assist with the discussion. The groups were encouraged to write their notes and comments on the questions directly onto the maps to provide spatial reference.

---

<sup>21</sup> <https://www.mentimeter.com/>





## What do you enjoy most about MTB riding in Canberra?



### What kind of riders?

95% of the workshop participants rode a mountain bike. This high rate of participation reflects the interest from the mountain bike community as well as being the target audience for the workshops. Most participants (80%) indicated that they ride at least weekly and participate in events, competitions and group rides. Around 10% rode at least fortnightly and enjoy more technical rides. A smaller number of participants only rode occasionally, and only a few did not ride at all.

### Could Canberra become a national/international destination for MTB?

Overwhelmingly, most workshop participants thought that Canberra could become a national/international mountain bike destination.

### What are the distinctive features of Canberra as a mountain biking destination?

Most participants felt that Canberra's distinctive features were like the reasons why they love riding in Canberra. The responses can be summarised into themes as follows:

- Scenery – mountains, bush and wildlife
- Proximity of trails to the CBD
- Diversity of trail type and multiple networks to ride
- Canberra as the Capital of Australia with good accommodation and world class attractions and an international airport
- Weather is good for riding all year and the city has clean crisp air



### **What are Canberra's strengths as a MTB destination?**

When asked about the strengths of Canberra as a mountain bike destination, the responses can be summarised into the following themes

- Natural Scenery – mountains, bush and wildlife
- Proximity of high quality trail networks to the CBD
- Its status as the capital city with a mix of quality attractions and amenities
- Diversity of trail types and multiple networks to ride
- All year riding destination - the weather is not too hot or cold for riding unlike other destinations
- MTB Culture - Passionate community and volunteers
- Proximity to major source markets such as Sydney
- Opportunity to access to elevation

### **What are Canberra's weaknesses as a MTB destination?**

When asked about the weaknesses of Canberra as a mountain bike destination, the responses can be summarised into the following themes

- Lack of investment in new and existing trails
- Poor signage and trailhead facilities
- Lack of government funding and commitment to strengthen offering
- Lack of hero or distinctive trails - nothing truly epic and ambitious
- Lack of medium to hard trails, lack of gravity trails, long flow trails and lack of technical and elevated trails.
- Loss of trails due to forest harvesting impacts on the trail network and condenses riders into smaller areas
- The trail networks are very much the same
- Connectivity between the hubs could be better
- Stromlo is getting too crowded and the mix of beginner and experienced is a strength and it is also a weakness – as all riders are funnelled into one area
- Lack of coordination across trail hubs
- Lack of marketing and information for visitors

### **Current trails- where would you invest to make CBR an outstanding MTB destination?**

The top three locations for further trail investment for all workshops were Blue Range, Stromlo, Majura Pines. For the other priority areas, the responses were slightly different, possibly reflecting the location of the workshop and the preferred riding location of participants. For example, investment in Bruce Ridge was rated fourth by participants at the workshops held in Canberra's North, whereas Tuggeranong Pines was ranked fourth by participants at the workshop in Canberra's south. Kowen Forest and Zoo Pines ranked fifth and sixth at all workshops. Workshop 3 results are not represented in Mentimeter summary below due the low number of participants. The responses from participants was manually recorded and are consistent with the mentioned priorities presented for Workshop 1.

## Workshop 1 Response



## Workshop 2 Response





## Where should new trails be?

The majority of participants indicated that new trail development should be west of Stromlo, the Cotter Recreation Area, Blue Range and Bullen Range. Several responses were consistent with investment in this area including extensions to Uriarra, Pierces Creek Pines, Warks Road and along the Murrumbidgee River Corridor as well as Namadgi National Park and Bimberi wilderness. Closer to the city, suggestions including better connections between hubs and with the National Arboretum, as well as new networks in North Lyneham, West Belconnen to Murrumbatemen wineries

One comment suggested that no new trails should be built. The suggested locations of new trails were:

- Blue Range
- West Stromlo
- Stromlo to Cotter Recreation Area link
- Bullen Range
- Uriarra, Pierces Creek Pines, Warks Road
- Along the Murrumbidgee River Corridor
- Bruce Ridge
- Bimberi Wilderness, Brindabellas and Namadgi National Park
- North Lyneham Eucalypt plantation
- From Belconnen to the wineries in Murrumbateman
- Duffy Pines (expansion of Stromlo)
- Tuggeranong Pines for jumps progression
- Molongolo Valley link from the National Arboretum to Stromlo.
- Connections of existing trails to make a MTB super loop
- Through the nature parks

Participants were also asked to discuss amongst their group what improvements need to be made to the current experience? And if there were to be new trails - where should they be located?

The responses were many and varied and can be summarised into the following themes.

## **SUGGESTED IMPROVEMENTS**

### **Trail Infrastructure**

- Improved signage on trails and trailheads, including Centenary Trail and Bicentennial Trail
- Better amenities at all trailheads
- Improved connections between hubs and between Centenary Trail and Bicentennial Trail
- Provide better access on Centenary Trail /Bicentennial Trail as gates are difficult to manage
- Family friendly networks separate to areas used by more experienced riders – this is particularly relevant for Stromlo
- Canberra needs an iconic or distinctive ride to make Canberra a MTB destination of choice
- Pump tracks at local shops and in local communities will encourage younger generations to ride and build culture
- Water stations on long distance trails (eastern side of Bicentennial Trail) and at all trail hubs
- New trails in the Cotter Recreation Area (and rebuild the pub), West of Stromlo and Blue Range will provide elevation, challenge and flow
- Identify camping options for riders who go back country
- Need for Majura Pines connection to Hackett
- Better co-ordination with Forestry to retain trails in forests
- Corin Forest to Woods Reserve should be considered
- Better Connection through Coppins Crossing
- New suburbs are affecting views and riding options

### **Other Infrastructure**

- Bike station at Canberra Airport
- Linking trail from airport
- Transport shuttles for visitors to hubs and city etc
- Infrastructure to support E Bikes – recharge and cages

### **Marketing**

- Improved information for visitors prior to arriving in Canberra through a central portal such as ‘Ride High’
- Interactive apps that allows riders to keep up to date on locations etc
- Encourage bike packing with better information on connecting trails in Namadgi National Park and Brindabellas with places to stay along the way – option for hut accommodation should be considered.
- Packaging of opportunities to make it easy and accessible for visitors new to Canberra
- Provide opportunity for guided tours
- Canberra should be considered for an IMBA Ride Centre
- Capture riders travelling to Thredbo to stay a few days in the ACT

### **Co-ordination**

- Improve co-ordination between hubs and with government
- Improve co-ordination with ACT Plantation Forests to retain trails and continue harvesting
- Partnerships with business, community, event organisers and government

### **Events**

- Limit the bureaucracy - too many limitations on event organisers is a disincentive
- Events potential is significant but need the right type of trails to make Canberra internationally competitive.



## B. APPENDIX: CASE STUDIES



### CASE STUDY: QUEENSTOWN TRAILS, NEW ZEALAND

Queenstown Trails are a successful example of visionary planning to respond to changing trends and extend the trails offering. An initial strategy was developed in 2004 to guide development of a world-class 190+km network of walking, hiking and biking trails across multiple tenures in the iconic nature-based and adventure destination of Queenstown. This trail network became an important local and tourism asset, with 90% of the plan having been implemented.

In 2015, a new strategic plan to guide the next 10-year phase of trail development and management was developed. In close consultation with trail stakeholders and community, outcomes of the first strategy and changes affecting use of the trails were analysed, and a vision and performance target were agreed.

The new plan consolidated work completed to-date and looked to respond to new opportunities not foreseen 10 years before. It also provided a solid footing for further growth in the trail use across the region and addressed the need to complete trail linkages for local resident and visitor use; strategies to improve trail experience delivery; ways to promote increased use and community stewardship of trails; improved information gathering; and sources of sustainable funding for trails development and management.

A survey of Queenstown Mountain Bike Club members and trail users in 2016/17 indicated a range of economic impacts resulting directly from the Queenstown Mountain Bike trails:

- Mountain bike trail users were estimated to spend NZ\$64 million per year in the Queenstown region. This spending covered bike related expenses, food and beverage, other retail spending, other adventure tourism spending and for overnight visitors, spending on accommodation.
- The trails generate a total of NZ\$25million in income for the Queenstown region annually.
- The operation of the trails and the users are estimated to generate a total 335 FTE jobs in the region (both direct and indirect).<sup>22</sup>

<sup>22</sup> Review of Economic Impact of Queenstown Mountain Bike Trails Draft Report May 2017

The Queenstown Trails are undeniably a part of the success of the tourism industry in Queenstown, with visitation growth and spending at record levels. Queenstown was the South Island's number one visitor destination in 2018.<sup>23</sup>

The Queenstown Trails Trust Trail Count Report dated 3<sup>rd</sup> April 2017 reported that there have been a total 1,294,144 trail journeys and 5,758,941 total trail movements (clicks) since opening in October 2012, this includes 114,982 journeys so far in 2017, compared to 109,538 in the same period in 2016, a 5% increase year on year.

In late 2018, Google mapped 120km of the trail to bring the trails into the digital age and publish the hiking and cycling tracks online.

Further expansions to link the resort's outer suburbs are planned in 2019, with the first stage of building works expected to start by the end of the year.

Queenstown Trails are also currently part of a new project, which will connect 4 existing Great Rides and link 30 communities along a 530km continuous cycle trail network across Otago. The Government has committed over \$13 million in funding for this proposed extension, which will be matched by local funding to reach the total NZ\$26 million required.

Much of the trail network is managed by a partnership between the Queenstown Lakes District Council, the Department of Conservation (DOC) and the Queenstown Trails Trust with input from community groups, user groups and businesses.

There has been extensive development of trail related products, packages and events. This includes links to existing food, beverage, accommodation and tourism attractions (such as wine tasting, historic attractions and bungy jumping) and the emergence of new businesses that provide guided tours, shuttle services, bike hire, retail and event services.

In addition, the trails are a significant local recreation, health, outdoor education, transport and economic development asset for the local population which is projected to increase from about 30,700 people in 2015 to 57,000 people in 2025.<sup>24</sup> About 40% of users of the Queenstown Trails are residents.

Sustainable funding sources for further development of the trail network and its ongoing maintenance is an important challenge for the Queenstown Trails Trust and its partners. The Trust has largely relied on fundraising activities, donations and returns from events to obtain funds, in addition to an annual contribution from Council. The 2015-2025 Strategic Plan recommends that the Trust diversify its revenue sources with mechanisms used by other trail management bodies including sales of maps and apps, operator contributions to trail maintenance and returns from concessions.



<sup>23</sup> Radio NZ Article 28th January 2019  
<https://www.radionz.co.nz/news/national/381129/queenstown-remains-top-south-island-destination>

<sup>24</sup> Queenstown Lakes District Council ((2015). Long Term Plan 2015.





## CASE STUDY: WELLINGTON TRAILS, NEW ZEALAND

Wellington and the surrounding region is a city made for mountain bike adventures - with over 350km of cycle trails within driving distance of Wellington city centre. Whether riders are looking for easy-going bike trails to check out some awesome scenery, looking for some downhill thrills, or looking for a more technical mission in one of the nearby mountain ranges, there are bike trails for every type of rider.<sup>25</sup>

The existing trails in the region are used by mountain bikers, hikers, trail runners and horse riders. Some trails are along old travel routes established over 100 years ago and some have been more recently constructed specific to new markets such as mountain biking. Wellington boasts a range of environments – the coast meets the rugged mountains, forests, rural and urban areas, all within easy access of the City.

Popular areas for mountain biking include:

- Makara Peak Mountain Bike Park
- Mount Victoria
- Most of the Southern Walkway
- Te Kopahou Reserve
- Firebreaks around Karori Wildlife Sanctuary
- Skyline Walkway from Johnsonville to Karori
- Wrights Hill
- Polhill Reserve
- Miramar Peninsula.

Domestically, around 24,000 mountain bikers live within the region and 78% of adults regularly participate in sport or active recreation at least once per week. Walking is the most popular activity closely followed by cycling, jogging and tramping.<sup>26</sup>

---

<sup>25</sup> <https://www.backpackerguide.nz/mountain-biking-in-wellington/>

<sup>26</sup> Sport New Zealand (2015). Sport and Active Recreation Regional Profile: Wellington Region – Findings from the 2013/14 Active New Zealand Survey. Wellington: Sport New Zealand.

The region is already seeing economic benefits from investment in trails; the Rimutaka Cycle Trail for instance was estimated to receive 89,659 domestic and international visitors in 2015 who generated revenue of around NZ\$3.3 million.<sup>27</sup>

The current strategy appreciates the importance of growing international visitation, it also caters for local people both within and outside of Wellington. This approach supports the aim of providing benefits not only economically, but also through health and social wellbeing with outdoor recreational experiences for local people.

The implementation of the Wellington Trails for the Future is working towards completion by 2025, resulting in:

- A healthy and vibrant outdoor lifestyle, making Wellington an attractive place to live and visit.
- A sustainably managed trail network offering safe and enjoyable experiences for all types of users.
- An active community of users, volunteers and groups who support Trail managers with delivery of successful trails.
- Best practice trail standards so experiences align with user expectations
- Expanded and enhanced trail offering including accommodation, guiding, hospitality, culture and other unique experiences.
- A trail network that provides hundreds of employment opportunities servicing various needs for users.
- Competitive and participative events capitalising on the range of experiences around both Wellington and the trail offerings.
- Opportunities to link experiences into neighbouring regions.

The Wellington trails have been categorised into three segments, catering for hero signature experiences attracting broad user groups and for locals and those seeking quiet or commuter trails.

- **Signature Trails:** A small number of outstanding trails that attract visitors and achieve recognition for the region as a trail destination and provide a focal point for regional residents.
- **Regional Trails:** Significant trails that form the core of the trail network and provide quality experiences for residents and visitors and attract users more familiar with the area or wanting less popular experiences.
- **Local Trails:** Trails that primarily service local communities. Local trails are important for everyday health, wellbeing, connectivity and amenity.

Best Practice Management – Makara Peak Mtn Park is located just outside of Wellington, in a 250-hectare reserve with a trail network of over 40kms. More than 80,000 visits are made to the park annually by bikers of all ages and abilities (as well as runners who constitute around 30% of visits). The park is managed under partnership between the Wellington City Council and a membership-based community organisation – this group contributes more than 4,500 volunteer hours annually to park projects.<sup>28</sup>



<sup>27</sup> Ministry of Business, Innovation & Employment (2016). Nga Haerenga – The New Zealand Cycle Trail Evaluation Report 2016.

<sup>28</sup> <https://makarapeak.bike/about-makara-peak>





## CASE STUDY: BLUE DERBY, DERBY, TASMANIA

The Blue Derby MTB experience in Tasmania was an initiative devised to support the rural township of Derby, suffering an economic decline at the conclusion of mining and forestry works.

Blue Derby is a network of mountain bike trails shared across two local Government areas (Dorset Council and Break O Day Council). The trails are centred on the two rural settlements of Derby and Weldborough. Stage one, comprising 23km of trails at Derby was launched in February 2015, followed by Blue Tier in 2016. When completed the area offered a full 85km of trails. Building on this success, there are over 200km of further trails planned (stage 2) to connect mountain bikers to the seaside town of St Helens. The project has been made possible by the Australian Government's Community Development Grant Programme, which allocated \$2.45 million. This was matched with \$700,000 in funding by a partnership of local stakeholders, making it the largest mountain bike trails project in Australia.

Derby has a mix of trails catering for all skill levels and riding styles, the pristine natural environment enhances the trail experience and sets a benchmark for other destinations to aspire to, attracting approximately 30,000 visitors per year. The town of Derby has seen new businesses open; accommodation beds increase

(from 12 rooms to more than 70 rooms) and a wave of residential and commercial real estate acquisitions. Dorset Council General Manager, Tim Watson, estimates the economic impact of mountain biking on the region is between \$15 and \$18 million dollars. He also states there have been 49 property sales in 18 months, or about \$5 million worth of turnover.

Strava data for the first quarter of 2016 shows that the Blue Derby trails and the North South track are the most popular riding trails (amongst Strava users) in Tasmania. Derby is one of the tourism icons of Tasmania. Stage 2 is expected to attract over 138,000 visitors, create 51 full time jobs and add a further \$6.88 million to the economy.<sup>29</sup>

- The Blue Derby MTB experience is attracting 30,000 visitors annually who spend 4-5 nights in the township of Derby, followed by 5 additional nights elsewhere in Tasmania. The return on investment to date has been estimated at approximately \$30million per year. In 2017, the Blue Derby trails were voted by professional mountain bikers as the best in the Enduro Series Competition. This was the first time a stage of this competition was hosted in Australia.

<sup>29</sup> [www.ridebluederby.com.au](http://www.ridebluederby.com.au), [www.abc.net.au/news](http://www.abc.net.au/news)  
[www.rdatasmania.org.au](http://www.rdatasmania.org.au)



## CASE STUDY: BARWON SOUTH WEST ADVENTURE TRAILS, VICTORIA

The Barwon South West Region of Victoria is comprised of nine local government authorities: The City of Greater Geelong, the Warrnambool City Council, the Shires of Surf Coast, Colac Otway, Corangamite, Moyne, Glenelg and Southern Grampians, and the Borough of Queenscliff. The region has a significant number of tracks and trails of varying types and standards, a small number of which are of a high profile and attract visitors from both within and outside of the region.

The region wanted to plan and position itself as an adventure trails destination – and covers numerous reserves, natural areas and visitor destinations.

Previous planning efforts for walking, cycling and mountain biking had been challenged by the complexity of the region, its numerous stakeholders and the large range of trails and trail management arrangements.

Over 20 trails already existed in the region, including 6 international and nationally significant trails and mountain biking hubs. An impressive calendar of international and national cycling and trail-based events was also in place.

A Vision and Business Case, Action Plan, Cycle Tourism Strategy, Marketing Strategy and Guidelines for Trail Planning, Design and Management were each prepared to achieve a coordinated and collaborative approach in developing a leading trails destination.

The approach taken was visitor-centric, rather than a landowner/manager approach and best-practice from world leading trail developers was utilised.

The outcomes included successful buy-in to the importance of lead and support trails, and agreement on which was which; community support and an understanding of the roles of the different trails; trails construction and management guidelines to assist the community; agreement to the commitment of funds to jointly invest in the priority trails; and a business case for investment.

Importantly, the project was implemented with the stakeholders continuing to work closely together on the agreed strategy. This included giving priority to a small number of iconic trails that could position the region, without being parochial. These would be priorities for investment, development and marketing within the bounds of expected resources.



With implementation of the proposed improvements and if the leading trails continued to attract existing and new visitors to the region, it was estimated that a 10% increase in visitor numbers could be achieved. This would result in an estimated \$24million in direct visitor expenditure per annum in the region and 273 jobs. In addition, the flow-on effects as a result of indirect expenditure were expected to be greater.<sup>30</sup>

The Barwon South West Adventure trail network is expected to deliver significant economic benefits to the Victorian community. With a 6-year investment of \$40million, the trail network net upgrade is expected to deliver \$74.7million in benefits over 10 years.<sup>31</sup>

The Barwon South West region of Victoria was recognised in the Planning Institute of Australia (PIA) Awards for Planning Excellence. The Guidelines won the Victorian Best Planning Ideas – Large Projects Award in 2015. The project also received an award from Parks and Leisure Australia in 2016.

These prioritised trails would become flagships for the region, form the core adventure trails and cycle tourism offering in the region and be used to attract private and public sector investment, and would offer the best opportunity for revenue generation:

- Great Ocean Walk
- Grampians Peaks Trail
- You Yangs MTB Trails
- Surf Coast Walk
- Forrest MTB Trails
- Twelve Apostles Trail
- Great South West Walk



<sup>30</sup> TRC Tourism, Growing Adventure Tourism in Barwon South West Region, A Business Case for Investing in Regional Trails in Barwon South West Region, June 2015

<sup>31</sup> TRC Tourism, Growing Adventure Tourism in Barwon South West Region, A Business Case for Investing in Regional Trails in Barwon South West Region, June 2015



## CASE STUDY: THE TIMBER TRAILS, NORTHLAND NEW ZEALAND

The Department of Conservation's concept of a cycle trail through Pureora Forest Park was agreed to in 2010. The trail starts in the old forestry village and heads south along disused logging roads and through mature forests to the farmland and village of Ongarue. New bridges and basic facilities such as toilets and signage were constructed. The total cost was NZD\$5million.

The business case for the trail estimated 4,000 overnight visitors and 3,000 day visitors by year 5, with a caveat that accommodation was provided at the midway point.

The trail opened in March 2013 and within a year 3,000 cyclists were using it, many riding it in a single day due to a lack of accommodation. The trail immediately received excellent reviews as the best 1-2 day remote mountain bike Great Ride in New Zealand.

The constraint to growth in the markets was accommodation on the trail. Whilst accommodation at the start and end was developed and camping was available, it took time for the private sector to commit to building a lodge. In early 2017, a 50-bed dedicated trail lodge was opened (Timber Trail Lodge). Shared and ensuite rooms, a licensed restaurant and dedicated cycle touring facilities were provided. The lodge was initiated by local investors who received some financial assistance from a Ministry of Business, Innovation and Employment private sector support programme, the now abandoned Tourism Growth Partnership Fund.

The total lodge build cost NZD\$3.5million, with the NZ Government grant contributing one-third of this.



The development of the accommodation complemented a range of local transport and bike hire providers. There are now 4 significant providers surrounding the trail. There has also been the rejuvenation of the villages at the start and finish of the trail with the development of cafes and other accommodation. A proposed serviced camping operation was consented and due to open in the 2018-2019 season.

The users of the trail were initially serious mountain bikers from the main North Island cities of Wellington and Auckland, who would do the trip in one day. This market stimulated the growth of the transport providers. The providers also offered transport from the trail at the halfway point to nearby accommodation, and this grew the market for a 2 day option with accommodation.

The market shifted and expanded to include the older (60-70 years) and family groups. The markets now predominantly come from throughout New Zealand and there are strong emerging markets from Australia and Europe. Specialised bike tour operators are making their presence felt and the current 10% overseas market share is likely to move closer to 25% within the next 5 years.

The customer profile for the Timber Trail Lodge is more varied than predicted. The assumption that the markets would be virtually all cyclists was wrong. The increase in the Timber Trail walkers has opened up the walking market and small group company retreats, and social groups are a strong emerging market for the lodge.

From over 3,000 visitors in the first year of the trail, growth has been solid for the first 5 years with now over 6,000 2 day riders and another 1,000+ day riders. Early market predictions for 2 day riders are up by 50%.

In the last 2 years, the Timber Trail has been incorporated into a major mountain bike event and the Te Araroa Trail, a 3,000km walk the length of New Zealand.

The impact of the trail for the local region has been regarded, both nationally and internationally, as a very successful part of the regional economic development program.

The lessons learned from the Timber Trail development include ensuring that:

- There is a well-development business case that is confident there is a market.
- The trail has legal access secured.
- The trail has a governance group.
- Leadership exists for the development of the concept.
- There are opportunities for the public sector to support the start-up of SMEs





## CASE STUDY: ROTORUA, NEW ZEALAND

In a country with some great mountain biking, this 180km trail network on the southern outskirts of the city are some of the finest.

Rotorua is a mountain bike haven famous for the Whakarewarewa Forest with a diverse and unique mountain bike trails. These trails have been expertly built and crafted to suit everybody, from complete beginners through to experts. The trail network is well signposted, with the length and grade of the trail clearly visible helping you to choose a track appropriate to riding ability.

Rotorua is also home to a number of international events throughout the year, including the ever popular and community-based Rotorua Bike Festival through to being the first stop on the Crankworx World Tour.<sup>32</sup>



<sup>32</sup> <https://www.rotoruanz.com/visit/see-and-do/cycling-mountain-biking>

<sup>33</sup> Estimates of the direct spending by people mountain biking in the Whakarewarewa Forest for the period 1 March 2017 to 28 February

Annual spending in the region by people who mountain bike in the Whakarewarewa Forest:

- For all riders estimated spending ranged from \$29.274 million (lower estimate) to \$47.321 million (upper estimate).
- For riders whose primary reason was to use the forest trails, spending ranged from \$21.521 million to \$37.680 million.
- Spending by locals was estimated at \$2.423 million (lower) and \$3.958 (upper).
- The major contributor to spending was domestic overnight visitors and international overnight visitors.<sup>33</sup>

2018 -Mountain Biking in Whakarewarewa Forest Economic Impact Study. July 2018



There are several mountain biking areas in Rotorua:<sup>34</sup>

**Whakarewarewa Forest:** known simply as ‘The Redwoods’, the 5600-hectare Whakarewarewa Forest is a mountain biking mecca. It is also one of the reasons Rotorua was awarded gold-level ride centre status by the International Mountain Biking Association (IMBA) – one of only six centres in the world.

**Skyline Gravity Park:** the world’s first year-round, gondola-accessed downhill mountain bike park features six different trails catering for riders of all abilities, and dedicated gondolas to take the hard work out of getting to the top of the trails’ 200-metre vertical rise. From the top of Mt Ngongotaha, there are panoramic views across Rotorua, its lake, and surrounding countryside.

Rainbow Mountain: less than half an hour south of Rotorua, experienced mountain bikers can enjoy this challenging ride through an amazing geothermal setting with a soak in a natural hot pool afterwards.

**Moerangi Track:** is all about appreciating the rivers and forests - now protected as the Whirinaki Te Pua-a-Tane Conservation Park. The forest is now the realm of the birds, and visited by hikers, hunters and mountain bikers who penetrate this remote wilderness via a network of trails. Passing through the heart of the park, the 35km Moerangi Mountain Biking Trail follows old hiking routes for much of the way, as well as newer sections built especially for mountain bikers.

### **Employment Impacts in Region** <sup>35</sup>

All riders in the forest generated a total of 210.1 full time equivalent jobs (178.5 direct jobs and 31.6 indirect/induced jobs) for the lower estimate of spending and 339.9 full time

equivalent jobs (288.8 direct jobs and 51.2 indirect/induced jobs) for the upper estimate.

Direct jobs are those in the businesses (accommodation, food service, MTB services etc.) where the initial spending occurs and indirect/induced jobs are those generated in other sectors by the initial round of spending and multiplier impacts. All these jobs are located in the Rotorua District.

Overnight visitors (domestic and internationals) are a major driver of these jobs because of the breadth of their spending covering accommodation, meals, bike hire and other MTB services. They account for around 75% of the total jobs generated for the lower and upper spending estimates. Local riders provide a base of support for MTB businesses in the region and their spending accounts for around 10% of jobs.

### **Income Impacts in Region** <sup>36</sup>

Riders and their spending have a significant impact on regional income in the Rotorua District.

All riders in the forest generated an estimated \$12.98 million in regional income (\$10.98 million direct and \$1.99 million indirect/induced income) for the lower estimate of spending and \$21.00 million in regional income (\$17.77 million direct and \$3.23 million indirect/induced income) for the upper estimate.

Overnight visitors (domestic and internationals) are a major driver of this regional income due to the breadth of their spending in Rotorua covering accommodation, meals, bike hire and other MTB services.

<sup>34</sup> <https://www.newzealand.com/au/feature/top-mountain-biking-tracks-in-rotorua/>

<sup>35</sup> Mountain Biking in Whakarewarewa Forest Economic Impact Study. July 2018

<sup>36</sup> Ibid



## CASE STUDY: ALICE SPRINGS, NORTHERN TERRITORY

Alice Springs is Australia's mountain bike hub in Central Australia - and it's oozing with single-track.

The region doesn't have the immediate mountainous impact that some mountain bike destinations have – instead tracks flow through the terrain following a mix of natural lines and step ups and down over rock shelves and jagged formations. The surface is almost always dry, offering a magic balance of gripping and drifting, depending on your speed. Thanks to the topography, there are no big climbs, but you're rarely in sight of the town and you can feel miles from anywhere while still only being 30 minutes or less from the comfort of your hotel.<sup>37</sup>

From here there are 28 kilometres of handmade singletracks to explore through national park and on crown land, ranging from flowy beginner trails to super technical. Each is marked with signposts to guide your ride.<sup>38</sup>

Existing trails are in the midst of being updated and marked with the addition of a new trail head and trails, and there is a new adventure trail heading out from Alice Springs under way, offering a completely different mountain bike experience to what is currently possible in the Red Centre – called the Red Centre Adventure Ride

The next great adventure, the \$12million Red Centre Adventure Ride has been earmarked for the Territory – and TRC Tourism<sup>39</sup> are currently planning the trail location.

It will be approximately 240km from Alice Springs to Glen Helen, west of Alice. The trail parallels the Larapinta Walking Trail. From Glen Helen the idea is there are two loops. One out to Ormiston Gorge, and one out to Redbank Gorge.

<sup>37</sup> <https://www.ambmag.com.au/gallery/all-about-mountain-biking-in-alice-springs-523692>

<sup>38</sup> <https://www.broadsheet.com.au/national/travel/article/hitting-mountain-biking-trails-alice-springs>

<sup>39</sup> <https://www.trctourism.com/>



This new project will be a long-distance trail, modelled off multi-day walking routes in Tasmania and other places, with well-designed ecofriendly camping and lodging options.

The concept is that each day will be 50-60km ride, and riders have designated camp sites with a range of high-quality camping options for self-contained travellers, plus options for outfitters to setup something for riders right up to luxe style glamping options.





The trails would all be beginner style, so they might suit someone riding it fast and light, or retirees out for a soft adventure - it's very much geared for entry level tourists.<sup>40</sup>

The Alice Springs region hosts several successful events, including:

- Easter in the Alice
- The Redback (the original Red Centre Enduro)

There are four main mountain bike trails in the Alice Springs network. The trails, named by traditional owners, are:

- Ilentye (galah)
- Arrwe (black-footed rock-wallaby)
- Tyape (witchetty grub)
- Apwelantye (black kite)
- Riders can also ride along a section of the Larapinta Trail as part of the Type Trail.

TRAIL NAME	DISTANCE	LEVEL
1 Ilentye 	4.9 km	1 Easy
2 Arrwe 	7.7 km	2 Intermediate
3 Tyape 	8 km	3 Intermediate
4 Apwelantye 	10.3 km	4 Intermediate
Larapinta Trail	2.7 km	

TRAIL NOTES
Shared use with walkers. Gentle gradients and a great introduction to the trails. Green arrows.
Shared use with walkers. Includes some short technical sections. Distance includes return to/from Spencer Hill. Blue arrows.
Shared use with walkers. Some technically challenging terrain and 4WD roads. Yellow arrows.
Shared use with walkers. Some great switchbacks and the steepest slopes on the trails. Red arrows.
As part of the Tyape Trail, mountain bikers can ride this small section of the world-famous walk.



<sup>40</sup> <https://www.ambmag.com.au/gallery/all-about-mountain-biking-in-alice-springs-523692>



## CASE STUDY: MAYDENA BIKE PARK, MAYDENA, TASMANIA

The Maydena Bike Park is a gravity-focused mountain bike park in Tasmania's Derwent Valley, designed and built by trail company, Dirt Art. It's a fully commercial operation, based on a pay-to-play model.

The park, opened in Jan 2018, is serviced by a year-round up-lift bus, servicing both mountain bikers and sightseers. Multiple gravity trails capitalise on the 820m+ vertical elevation available on site, offering an array of long-distance descending trails, catering for all abilities.<sup>41</sup>

The bike park has 62+ individual trails including a top to bottom family-friendly ride, wilderness trail and epic pro trails – covering 120kms in network length. All trails capitalise on the park's unique rainforest environment. The park offers: shuttle uplift service, pump track, sightseeing tours, bike hire, retail bike shop, café, bar, skills coaching and group skills sessions, and a range of tours.

The park is a 1.5hour drive from Hobart, near the small country town of Maydena with a population of no more than 250 people.<sup>42</sup> Stakeholders, including Tasmania Parks and Wildlife, local and state governments and tourism bodies, have come together and assisted in the creation of what they consider will become a genuine tourist asset for the region.<sup>43</sup>

- The events calendar for the park contains the Gravity Enduro National Championships and Kids Fest.
- Maydena Bike Park management state they have had over 20,000 riders in the first year of operation, primarily over the summer months. In terms of economic impact, they note the increases in local property value and the Park itself creating upwards of 10-20 new job roles in Maydena.
- The Park offers a range of ticketing options, including; day tickets, multi-day tickets, single run tickets and limited Season Passes.
- 1-day Uplift Pass \$75 child, \$80 adult



<sup>41</sup> <https://www.maydenabikepark.com/about/>

<sup>42</sup> <http://www.mtbiking.com.au>

<sup>43</sup> Ibid



## C. APPENDIX: LOCATIONS WHERE CYCLING IS PERMITTED ON MULTI USE TRAILS

Nature Reserves	Cycling permitted
Aranda Bushland	✓
Black Mountain	✓
Bruce Ridge	✓
Callum Brae	✓
Cooleman Ridge	✓
Crace Grassland	✓
Dunlop Grasslands	✓
Farrer Ridge	✓
Goorooyarroo	✓
Gossan Hill	✓
Gungaderra Grasslands	X
Isaacs Pines	
Jarramlee/West MacGregor Grasslands	X
Jerrabomberra West Grasslands	X
Justice Robert Hope Park	X
Kinlyside	X
Kowen Escarpment	✓
Melrose	✓
McQuoids Hill	✓
Mount Ainslie	✓
Mount Majura	✓
Mount Mugga Mugga	✓
Mount Painter	✓
Mount Pleasant	✓
Mount Taylor	✓
Molonglo Gorge	X
Mulanggari Grasslands	X
Mulligans Flat (Equestrian trail in Little Mulligans)	✓
Oakly Hill	✓
O'Connor Ridge	✓
Percival Hill	✓
Red Hill	✓
Rob Roy	✓
The Pinnacle	✓
Tuggeranong Hill	✓
Urambi Hills	✓
Wanniassa Hills	✓

Source: Canberra Nature Park Draft Plan of Management 2019

## D. APPENDIX: MOUNTAIN BIKE (MTB) TRAIL STANDARDS

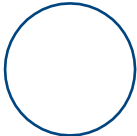
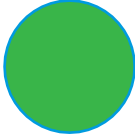


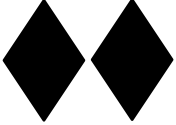
MTBA have just released their Australian Mountain Bike Trail Guidelines which incorporate content from the Western Australian Mountain Bike Management Guidelines. The guidelines include the principles of general trail planning, design and construction, technical features, sustainability, signage and the trail development process from project proposal to management of trail networks.

<https://www.mtba.org.au/news/australian-mountain-bike-trail-guidelines/>

The International Mountain Biking Association has established an international *Trail Difficulty Rating System*. Adapted from an international trail system for ski areas, the Rating System has also been applied to horse riding trails. There are two trail rating systems for mountain biking:

- Trail Managers System - to ensure construction and management adhere to and measure against specified criteria.
- Trail User System – this provides trail ratings to help users make decisions about which trails are suitable and appropriate for their skill level.
- The Trail Difficulty Rating System includes five levels of difficulty:

International Mountain Bike Trail Rating System<sup>44</sup>

Very Easy	Easy	Intermediate	Difficult	Extreme
				
White Circle	Green Circle	Blue Square	Single Black Diamond	Double Black Diamond

The ratings are determined by four measurable criteria:

- Tread width
- Tread surface
- Trail Grade
- Natural obstacles and technical trail features.

With MTB trail development, it is important to include MTB clubs, potential riders and experts in the experience and their suggested ratings from a user perspective.

<sup>44</sup> Adapted from [www.imba.com](http://www.imba.com)



## E. APPENDIX: ROTORUA MOUNTAIN BIKING - MANAGEMENT & GOVERNANCE<sup>45</sup>

There are four main areas for Mountain Biking:

1. Moerangi Mountain Biking Trail, cross country, 1hr 40mins from Rotorua – 35kms of trail
2. Rainbow Mountain MTB Trail, cross country / technical downhill, 30mins from Rotorua - 10kms of trail
3. Skyline Gravity Mountain Biking Park, gondola / downhill, 10mins from Rotorua – 10.5kms of trail
4. Mountain Biking in The Redwoods (Whakarewarewa Forest), cross country / downhill, 5 mins from Rotorua – 160+kms of trail

### Cost to Ride

There is no charge to ride in the Redwood Forest, Moerangi or Rainbow Mountain. All these areas are administered by the Department of Conservation (D.O.C.) and are open to ride at no charge.

Skyline MTB Gravity Park is a privately owned commercial venture - 12 trails within a 12km trail network operating a gondola. Passes are:

	Adult (NZ\$)	Youth (NZ\$)
<b>1 Uplift</b>	\$32	
<b>15 Uplift</b>	\$61	\$46
<b>40 Uplift</b>	\$115	
<b>65 Uplift</b>	\$165	
<b>100 Uplift</b>	\$225	
<b>MTB Season Pass</b>	\$799	\$549

### The Redwoods (Whakarewarewa Forest) Maintenance

The Rotorua Trails Trust continues the achievements of the Rotorua Mountain Bike Club who has, over several years, developed and maintained the network of quality mountain bike trails within the Whakarewarewa forest. The Trust has now taken on this role and the challenge of extending the trails and further improving the network.

The Rotorua Trails Trust builds, rebuild, maintain and advocate for MTB, walking and equestrian trail network in the Whakarewarewa Forest as well as the Rainbow Mountain trails, Te Ara Ahi network and Western Okataina trail. It is also involved with the Urban cycleway project. The Whaka network alone runs into over 200km of trail to maintain and the forest being a working forest there is always rebuild work to undertake after logging.

The Rotorua Trails Trust funded through a combination of contracted work for the council and fundraising activity such as grant applications and membership donations. They rely heavily on volunteers - from the Trustees to the 'on trail' volunteers as well as sponsors.

All trail building requests go through the Forest Recreation Management Group made up of Iwi landowner representation, Rotorua Lakes Council and Timberlands. The Rotorua Trails Trust presents new trail ideas to this group for approval. Decisions are made about how the trail will be funded and whether they will build the trails or contract the work out. Any trail being destroyed by logging can be rebuilt automatically.

<sup>45</sup> [www.newzealand.com/au/feature/mountain-biking-in-rotorua/](http://www.newzealand.com/au/feature/mountain-biking-in-rotorua/)  
[www.skyline.co.nz/en/rotorua/things-to-do/rotorua-mountain-biking/](http://www.skyline.co.nz/en/rotorua/things-to-do/rotorua-mountain-biking/)  
[www.redwoods.co.nz/bike/track-maintenance/](http://www.redwoods.co.nz/bike/track-maintenance/)  
[www.whaka100.co.nz/news/rotorua-trails-trust](http://www.whaka100.co.nz/news/rotorua-trails-trust)  
[www.rotorualakescouncil.nz/our-council/news/Pages/default.aspx?newsItem=7984](http://www.rotorualakescouncil.nz/our-council/news/Pages/default.aspx?newsItem=7984)

## **Mountain Bike Trail Investment**

Proposed forest developments, which are included in Council's 2018-28 Long-term Plan, would see improvements to Long Mile Road, the Redwoods i-site and carparking, and the creation of a new recreation hub at another entry to Whakarewarewa Forest along Tarawera Road (between Okareka Loop Road and Lake Tikitapu).

Council is preparing detailed business cases for both the forest enhancements and development of Rotorua's lakefront as part of applications for funding from the Government's Provincial Growth Fund (PGF). Council has received NZ\$811,000 from the fund to prepare the business cases.

### **Forest Management / Governance**

The Tokorangi and adjoining Whakarewarewa Forest combine to provide a vast recreational area with a vast network of trails for mountain biking, walking, running and horse riding. The Redwoods area, which is part of the Tokorangi Forest, is largely used for walking and running.

Tokorangi Forest and Whakarewarewa Forest are managed under Crown Forest Licence by Rotorua Lakes Council and Kaingaroa Timberlands Limited for the CNI iwi collective who are the land owners – their interests are looked after by CNI Iwi Holdings Limited.

The Crown Forest Licence and the Deed of Settlement provides for general public access to the forests by foot, bike or horse. All other recreational access, both commercial and non-commercial, is subject to the discretion and joint agreement of Rotorua Lakes Council, Kaingaroa Timberlands and CNI and is managed under the Recreational Use of the Tokorangi and Whakarewarewa Forests Interim Policy.

Council is the recreational manager under this Policy and has an obligation to manage the environment of the Tokorangi Forest under the Conservation covenants within the Tokorangi Crown Forest Licence.

Council is entering into a co-governance model with CNI Iwi Holdings, Ngati Whakaue and Tuhourangi. An overall recreational use plan being prepared for the forests will ensure ongoing public access for all user groups and may open up opportunities for recreational tourism developments.

Last year the council won the judges' choice award at the Local Government New Zealand Excellence Awards, for the district's mountain bike strategy. The project was about establishing Rotorua as a globally recognised mountain bike destination through its trails, infrastructure and events.

### **Council Event Assistance**

Crankworx Rotorua is run in conjunction with its Canadian owners Crankworx Events Incorporated, the local festival organiser and not-for-profit company Mountain Bike Events Ltd. This event is conducted mainly at Skyline.

Council agreed to provide an underwrite for Crankworx of up to NZ\$500,000 between 2015 and 2021, on the basis of the anticipated economic benefits for Rotorua. The underwrite called upon for 2015 was NZ\$94,000 and in 2016 it was NZ\$39,000 with no underwrite required for 2017.



TRC

