

MACKAY REGION MOUNTAIN BIKE STRATEGY

Final Report

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Prepared for Mackay Regional Council by Otium Planning Group in partnership with World Trail.

Mackay REGIONAL COUNCIL

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ABBREVIATIONS

MTB	Mountain bike
IMBA	International Mountain Bicycling Association
MTBA	Mountain Bike Australia
UCI	Union Cycliste Internationale
MADMTBC	Mackay and District Mountain Bike Club
QORF	Queensland Outdoor Recreation Federation
DH	Downhill
TDRS	Trail Difficulty Rating System
TTF	Technical Trail Feature
WT	World Trail
XC	Cross-country
XCO	Cross-country Olympic
XCM	Cross-country Marathon

PHOTO CREDITS

(A) Photos supplied by Mackay and District Mountain Bike Club, taken by Rob Conroy.

(B) Photos supplied by Mackay Regional Council.

1 EXECUTIVE SUMMARY



The Mackay Region's stunning natural environment and developing tourism market offers great possibilities for development of the region as a signature mountain biking destination. The region has tremendous potential to develop a mountain biking market underpinned by a unique and nationally/internationally significant trail town offering based around Eungella-Finch Hatton. The opportunities on offer respond well to key needs and gaps identified for the Queensland and Australian mountain biking tourism markets as well as key economic development directions for the region.

The Eungella-Finch Hatton Trail Town opportunity is central to the viability of developing the region's mountain biking tourism market and should be considered strategically valuable in developing state and national mountain bike tourism overall. The key advantages of the Eungella-Finch Hatton opportunity include: the stunning natural environment; excellent elevation; substantial trail land availability; ability to provide for all mountain biking disciplines and levels; potential diversity of complementary activities and; proximity to a major regional city and airport. Moreover, it has direct alignment with the region's key tourism and economic development goals.

The focus of this strategy has been to understand:

1. What is required to create a nationally significant mountain bike tourism destination?
2. Does the region have the capability to deliver what is needed?
3. If the region is capable, then what are the next steps required?

1.0.1 CREATING A MOUNTAIN BIKE TOURISM DESTINATION

To create a successful mountain bike tourism destination the following key capabilities are required:

- Extensive trail network with two or more days' worth of riding (more than 50km of trails and ideally at least 100km)
- Diversity in trails catering for different skill levels and types of riding
- Supporting infrastructure (accommodation, access, rider amenity)
- Supportive tourism and cycle sport industry (cafes, cycle businesses, rider services etc)
- Appropriate advertising and marketing
- Major airport within 1-3 hours
- Alternative activity options to support family visits
- Supportive local mountain bike clubs
- Signature events

1.0.2 MACKAY REGION CAPABILITY

The Mackay region, and specifically the upper Pioneer Valley and Eungella area, has the capability to develop into a major destination for mountain bike tourism attracting a national and greater market. While much of the capacity and infrastructure is yet to be developed, the potential has recently been recognised in the Queensland Mountain Bike Strategy with the Mackay Region rated as a High Priority Area for investment and development.

The key strengths of Mackay are:

- Established major regional airport with connections to most capital cities and capacity for increased flight traffic, located less than two hours from a key Trail Town opportunity.
- A number of trail opportunities around Eungella/ Finch Hatton including the potential for rapid development of at least two days of flow and downhill trails and long term continued expansion of a network which provides for diversity of trails, riding styles and abilities.
- Highly motivated and supportive local mountain bike club/ community.
- Extremely supportive Council with strong coordinated strategies for developing tourism.
- Exceptionally scenic riding landscape around Eungella and Finch Hatton along with wider regional opportunities.
- Diverse range of supporting and complimentary outdoor recreation and nature-based tourism opportunities including, walking, road and path cycling, lake-based sports, fishing, reef tourism and cultural and historic tourism.



1.0.3 RECOMMENDED KEY STEPS

The following key steps are recommended to realise this opportunity:

01

ESTABLISH A COORDINATED PLANNING AND MANAGEMENT FRAMEWORK BY:

- Forming a Regional Mountain Biking Alliance
- Undertaking a Feasibility Study to implement the Eungella-Finch Hatton Trail Town concept.
- Developing a detailed Trails Master Plan to provide a consolidated spatial plan for trails.
- Establishing agreements for the management and maintenance of trails.
- Seeking relevant endorsements, permits and approvals.

02

MOBILISE MOUNTAIN BIKING STAKEHOLDERS BY:

- Developing a Partnering Strategy.
- Developing an education package for local accommodation, food and beverage and tourism business to encourage and enable involvement in the mountain bike tourism industry.
- Developing a package for political advocacy.
- Identifying potential funding and investment partners.
- Partnering with Central Queensland University to explore opportunities for research and placement.

03

STRENGTHEN THE GRASSROOTS MOUNTAIN BIKING SCENE AND GROW PARTICIPATION BY:

- Partnering with Mackay and District Mountain Bike Club to build a program of club development.
- Partnering with Mackay Christian College to support the mountain bike excellence program.
- Developing a network of schools to build grassroots participation and skills development.
- Assisting to develop signature MTB events.
- Identifying regional, state, national and international events suitable for the region to bid for.

04

EXPAND THE TRAILS NETWORK AND SUPPORT INFRASTRUCTURE BY:

- Developing the Eungella-Finch Hatton mountain bike park as a multi-discipline all-levels network.
- Identifying a suitable site for the Mackay Urban MTB Park.
- Developing Mt Kinchant Regional Park as a regionally/state significant gravity focussed trail network.
- Continuing to develop Rowallan Park as a regionally/state significant cross country trail network.

05

BUILD THE MOUNTAIN BIKING TOURISM PRODUCT BY:

- Developing a Marketing and Promotion Plan and campaign for mountain biking.
- Creating a suite of mountain biking information/tools (mapping, guides, and digital tools).
- Partnering with Tourism Mackay and suppliers to identify rider support services required.
- Partnering with Tourism Mackay/ suppliers to identify accommodation & hospitality offers /packages.

The main priority is the development of the Eungella-Finch Hatton Trail Town supported by sufficient trails to operate as a destination and to begin to build the reputation of the region. It is essential that the initial launch is done well, and that the trail diversity and supporting infrastructure are on par with competitive products.

If critical feasibility investigations prove positive, it is recommended that Council pursue the development of the initial trail network in a collaborative effort with key partners, including Mackay and District Mountain Bike Club, Queensland Government, Australian Government, tourism bodies, and the commercial sector. Engaging these and other stakeholders through the establishment of a Mackay Region Mountain Biking Alliance will be imperative moving forward.

The initial priority for the Eungella-Finch Hatton trail town is a signature beginner-to-intermediate level Flow descent trail which seeks to present the full impact of the region's elevation, offering breathtaking views and access to the area's most stunning landmarks. This initial 'hero trail' is the anchor for further development and would be a point-to-point trail, 20-30km in length, which would require a wide range of rider support services, including shuttles. In addition to this trail, a number of other trail opportunities offering a total 70 - 100km of trails would need to be developed via an ongoing program, to create at least two days' worth of diverse riding catering to a range of skill levels.

Delivering a high-quality, memorable trail will be the first critical step in generating a groundswell of interest for the region as a mountain biking destination.

The initial investment to deliver this first priority project would include at least $200,000 for trails and infrastructure planning and a minimum of $1.5M - $2.0M for trail construction (excluding structures such as bridges, shelters etc.). On top of this investment would be costs such as those for marketing and promotion, contributions to rider support services, and projects to strengthen the local mountain biking market.

As a conservative assessment, it is estimated that there is potential to attract 18,000 visitors annually to the region for mountain biking as a result of the Eungella-Finch Hatton Trail Town, generating a minimum of $6.048 million new income annually (excluding flow on benefits and income from growth of local participation). When coupled with multipliers from additional night stays, expenditure by accompanying partners/ children the initial investment could see a significant return many times this. Blue Derby in Tasmania has estimated that they now see a $30 million annual return on an initial investment of $3.1 million.[1]

The majority of these visitors would be domestic tourists with a mix of fly and drive. Over time it is highly likely that international tourism will build as complementary tourism opportunities are aligned with mountain bike tourism and the region's profile and prominence gain ground in the market.

1.0.4 FUTURE PLANNING AND INVESTMENT SHOULD CONSIDER:

- The need to offer a **unique and spectacular mountain biking product** which takes most advantage of the region's stunning natural environment.
- The need to have **continued investment in the trails network** to keep expanding opportunities and diversifying the product to encourage return visits.
- The enormous value of a **strong local mountain biking market** to development of the region as an outstanding mountain biking destination.
- The critical nature of **rider support services and tailored tourism products** to establishing the region as a desirable mountain biking destination.
- Establishment of a new **event or enhancement of an existing event that will enable international promotion of the region.**
- The **significance of maximising and nurturing partnerships** to the achievability of this strategy.
- The importance of **thorough planning and timely delivery** to make the most of the outstanding opportunity on offer.

1 http://www.abc.net.au/news/2017-12-26/mountain-bike-trails-driving-major-change-in-derby/9276384

2 INTRODUCTION



Mountain Biking is a dynamic outdoor activity which offers enormous sport, recreational, and tourism opportunities. It is emerging as a particularly attractive activity for regions characterised by outstanding environmental landscapes. Given its stunning natural attributes and growing tourism sector, the Mackay region is perfectly poised to explore the range of opportunities mountain biking presents.

Increasing interest in mountain biking aligns with one of the key 'megatrends' identified by the Australian Sports Commission[2]: **From extreme to mainstream.** This megatrend captures the rise of lifestyle, adventure and alternative sports which are particularly popular with younger generations. These sports typically involve complex, advanced skills and have some element of inherent danger and/or thrill-seeking. They are also characterised by a strong lifestyle element and participants often obtain cultural self-identity and self-expression through these sports.

Mountain biking is growing in popularity and there is widespread interest from Local Governments across Australia to explore the potential to develop mountain bike (MTB) trails in their area, particularly in regional Australia. Mackay Regional Council acknowledges the rise of mountain biking and the potential it has to benefit residents and visitors alike. Council is keen to ascertain the opportunities for mountain biking in the region through a strategic lens. Council seeks to identify a shared vision for mountain biking in the region, understand the trends that underpin best-practice mountain biking growth and development, and pinpoint the specific opportunities and constraints for the Mackay region.

The Mackay Mountain Bike Strategy was commissioned to:

Identify and prioritise key projects, actions and deliverables to enhance, promote and manage the Mackay region's mountain bike industry.

2 Hajkowicz, S.A., Cook, H., Wilhelmseder, L., Boughen, N., 2013. The Future of Australian Sport: Megatrends shaping the sports sector over coming decades. A Consultancy Report for the Australian Sports Commission. CSIRO, Australia.

2.1 METHODOLOGY

The following methodology was applied for the study, culminating in this report:

PART A
Industry Trends and Best Practice Review

- Trends analysis
- Planning & governance impact review
- Benchmarking
- Best practice principles/ characteristics
- Stakeholder engagement

PART B
Regional Audit

- Regional audit preparation and delivery

PART C
Gap Analysis and Opportunities

- Gap analysis
- Opportunities analysis
- Economic benefits analysis

PART D
Recommendations

- Action & Implementation Plan

This report explores trends and case studies influencing development of the mountain biking industry in Australia, specific gaps and opportunities in the Mackay region, potential economic benefits the development of a mountain biking market in Mackay might bring about (high level overview), and provides a series of recommendations for consideration.





3 PLANNING & GOVERNANCE IMPACT REVIEW



In order to understand the planning and governance impacts at a local, state and federal level on development of the mountain biking (MTB) industry in the Mackay region, a series of information sources have been explored. A summary of the potential impacts is detailed in Table 1 below.

Table 1: Review of planning and governance impacts

Impact Level	Source	Key Information	Potential Impacts
FEDERAL	Mountain Bike Australia (MTBA) Press Release	MTBA was officially been recognised as a National Sporting Organisation (NSO) by Sport Australia in 2017. However, MTBA is currently an unfunded NSO.	Increased opportunity for funding for MTBA to promote the growth of MTB.
	The Future of Australian Sport: Megatrends shaping the sports sector over coming decades *Australian Sports Commission*	A number of the mega trends identified in this document have relevance to mountain biking: « A perfect fit – individualised activities are on the rise. « From extreme to mainstream – A rise in lifestyle, adventure and alternative sports. « More than sport – the broader benefits of sport, including crime prevention and social development and inclusion, are being increasingly recognised. « Everybody's game – an ageing population, means that sports will need to cater for senior citizens.	These trends are likely to guide federal (and all other levels) in their planning and funding for sport and recreation into the future. A number of the trends have strong links to and opportunities for mountain biking. In particular, the opportunity exists to use these trends as a tool to obtain funding for the development of the mountain biking industry in Mackay.
	Queensland State Planning Policy *Dept. Infrastructure, Local Government and Planning*	It is likely that the tourism industry in Mackay will see significant expansion and further generate local employment through development and operation.	Suggests tourism is a growth opportunity for the Mackay region, an avenue worth exploring for the MTB offering.
STATE	Mackay, Isaac and Whitsunday Regional Plan *Dept. Local Government & Planning*	Identifies need to broaden tourism opportunities to help diversify the regional economy, including a focus on history and heritage. The subregion offers significant regional landscape and natural environmental values, including the Pioneer Valley up to Eungella National Park, protected areas, extensive forested areas, agricultural land, rural towns, wetlands, sandy beaches and offshore islands.	Suggests new tourism opportunities would be favourably viewed by the Qld Govt, particularly if history and heritage elements could be incorporated. The Pioneer Valley, including Eungella and Finch Hatton, are highlighted as an area of focus for tourism development.
	Queensland Ecotourism Plan 2016-2020 *Dept National Parks, Sport & Racing*	Vision: Queensland is an internationally celebrated ecotourism destination, delivering world-class interpretation and experiences that support the conservation of special natural places and unique Indigenous and cultural heritage. Strategic directions: « Driving innovation in ecotourism experiences. « Showcasing the world renowned Great Barrier Reef. « Stimulating investment in new and refurbished ecotourism opportunities. « Expanding authentic Indigenous ecotourism experiences. « Promoting Queensland's world-class ecotourism experiences.	The strategy should seek to understand and leverage shared eco and adventure tourism opportunities.

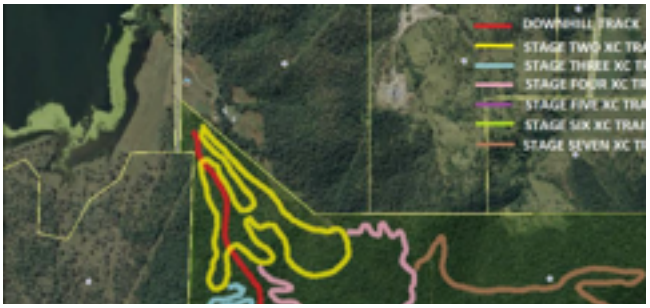
Impact Level	Source	Key Information	Potential Impacts
STATE	Queensland Mountain Bike Strategy 2018 *MTBA*	Commissioned to gain an understanding of the existing and projected demand for MTB trails, identify gaps, constraints and opportunities, and provide strategies to guide trail investment decisions. Provided a Strategic Prioritisation Framework using a Multi Criteria Analysis incorporating criteria under three main categories: « Scale – existing and future populations, proximity to airports and highways, existing tourism market, additional activities and desirability. « Opportunity - potential land availability, elevation range and spread, landform character and trail diversity and opportunity. « Deliverability – established demand, existing trail and infrastructure supply, governance, land holder and stakeholder objectives and planning constraints and sensitivities. Identifies top six priority regions for Queensland, within which the Mackay region is included. Mackay region is listed as a 'high' priority with the following recommendation: "Location Area Planning should be continued in accordance with the recommendations of the emerging Mackay Regional Mountain Bike Strategy. Explore potential to include the Whitsundays within Location Area." Key gaps identified for Queensland include: « Lack of trails, facilities and infrastructure that cater to the needs of all abilities: • Lack of accessible trail information • Undersupply of introductory trail experiences to cater for beginners and build skills and confidence • Undersupply of black and double black classification trails that cater to the needs of riders of advanced abilities • Lack of all mountain and gravity style trails « Lack of tourism product: • Lack of single track trail networks that will draw visitation from intrastate, interstate and overseas • Lack of locations that could attract national and international MTB events • Lack of visitor information and services	It will be imperative to understand the significance of the opportunities in the Mackay region and how they align with this strategy. Consideration of the gaps identified for MTB in Queensland will be particularly important.

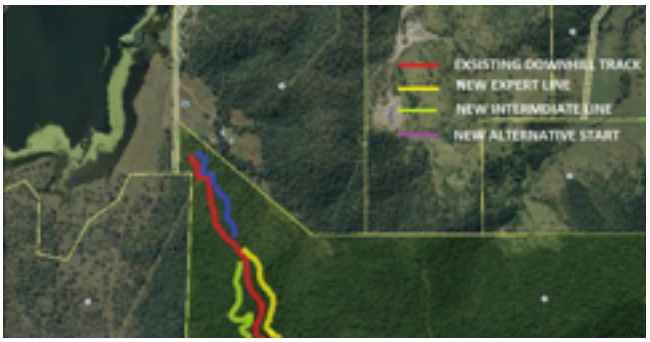
Impact Level	Source	Key Information	Potential Impacts
STATE	Queensland Cycling Strategy 2017-2027 *Department of Transport & Main Roads*	This Queensland Government document outlines a direction for cycling over a ten-year horizon. Five priorities are identified. These are presented below along with key information of relevance to a Mountain Bike Strategy for Mackay. **PRIORITIES AND KEY ACTIONS & INFORMATION** Priority 1: Building and connecting infrastructure to grow participation. « Consult, collaborate on network improvements, infrastructure projects and maintenance needs. Priority 2: Encouraging more people to ride. « Provide up to date and consistent signage to help way finding. « Promote & support technologies to make it easier to plan and navigate. « Prioritise education programs that reach people who need more support to start riding e.g. children, women, older people. « Promoting cycling and its benefits. « Support: events, education & behaviour programs. « Adapt regulations to safety requirements for e-bikes will enhance safety of all users. Priority 4: Powering the economy. « Getting more people cycling contributes to the economy through health, employment, tourism and local businesses. « Support cycle tourism - funding to build and promote rail trails & touring routes. « Provide advice to help regions identify & develop new trails & investigate ways to support growth of active tourism. « Support communities to identify & grow cycling events to attract visitors. « Investigate opportunities to make holding cycling events easier. « Mountain biking events and promotion deliver significant economic benefits. Priority 5: Using research & data in decision making « Will use research & data as the basis of decision-making and investment in cycling infrastructure, programs & education.	Strategy acknowledges the economic opportunities cycling tourism presents and expresses commitment to supporting efforts to deliver these opportunities. The key actions identified to facilitate cycling should also be considered for this strategy.
	Operational Mountain Biking in QPWS managed areas *- Dept. National Parks, Recreation, Sport and Racing*	MTB will be promoted where suitable facilities and opportunities exist, and on designated multi-use and MTB single-use trails where the activity has been assessed as suitable. QPWS seeks collaboration to plan, provide and manage MTB activities. QPWS endorses the use of IMBA trail development guidelines. QPWS considers the following when assessing the suitability of MTB activities: other opportunities, community considerations (tourism, employment, economic, social, youth), land tenure, site suitability, sustainability, compatibility, safety, landscape classification, partnerships.	Suitable planning, design, development of MTB trails and facilities would need to be provided in order to gain QPWS support. QPWS should be seen as a strong potential partner for development of the MTB industry in the Mackay region. Proposals for partnership should be well researched, identifying the breadth of benefits, and compliance with IMBA and other industry-leading guidelines.

Impact Level	Source	Key Information	Potential Impacts
LOCAL	Mackay Region Planning Scheme 2017	The Planning Scheme provides Council's intent for the development of the Mackay Local Government Area (LGA) over a 20-year horizon. It specifies land uses and development parameters.	A plan for expansion of mountain biking in the region will need to consider where mountain biking aligns with the land use intent outlined in the planning scheme. Proposed MTB facilities will need to comply with development codes and policies.
	Sport, Recreation & Open Space Plan 2010 - 2016	The following recommendations from this 2010 plan should be considered in the development of a Mountain Bike Strategy: Regional Facilities Strategy « "Regional Facilities Strategy with a focus on the establishment of several 'Event Precincts' across the Council area. These Event Precincts would build on existing infrastructure and aim for an ongoing strategy to consolidate facilities in these precincts and establish key events for each." It also recommended that "the aim of the strategy should also be to identify those sporting bodies or groups who can drive the development of key facilities in each precinct and to establish support mechanisms for these groups." « Specifically, the plan suggested consideration of MTB and crossover pedal sports at Black Mountain. Precinct Management Plans « In conjunction with user groups prepare Precinct Management Plans which identify future growth and development priorities and formalises management and coordination across the precincts between groups and Council. « The following should be prepared in the next five years: b) The old dump land on Petrie St (which has the potential to be developed as an adventure sport precinct linking to the beach area) could support uses such as Blokarts, BMX, Mountain Biking and Archery. Sports Tourism « Consider establishing a Sports Tourism Working Group to help coordinate and develop proposals for events and precincts. The Sports Tourism Working Group should investigate the potential for development of a niche market in specific types of events (e.g. schools championships). This would mean tailoring facility and accommodation directions to meet the market need above other opportunities. « Proposals requiring Council investment to upgrade facilities for a single event only should not be supported. Any capital provided for facility development upgrades should be prioritised for multiple event outcomes and general capacity building in hosting events. « Several sports indicated there was potential to stage events and to attract visiting teams for pre-event training. « Sports tourism could also be boosted by development of outdoor/ adventure sport opportunities such as Mountain Biking. « Developing sports tourism needs further development of facility/ event hosting capacity this means improving the accommodation and athlete "stay" capacity in the region and around specific hubs.	The potential for mountain biking as a sports tourism activity is clearly highlighted in this report. Identifying sites with the most potential will assist future work on any events strategy, and considerations such as the potential to target niche markets and event support needs must be examined. Sites identified (Black Mountain and Petrie Street) should be considered.

Impact Level	Source	Key Information	Potential Impacts
LOCAL	Mackay Regional Council Environmental Sustainability Strategy 2017-2022	Council's Environmental Sustainability Strategy provides a framework for advancing environmental sustainability in the region. Elements key to the development of a MTB strategy are summarised below. Strategic outcomes and guiding principles « Sustainable Region (our vision) - Our region's prosperity, liveability and lifestyle is underpinned by a healthy and sustainable environment managed through Council, industry and community partnerships. « A Sustainable Natural Environment - The sustainability of our region is dependent on our ability to preserve and enhance natural infrastructure and ecological values, while benefiting from the products and services provided by our natural environment. « Sustainable Transport - Connected, active, electric and shared transport options reduce carbon emissions and energy consumption while improving air quality and use of public spaces. « Regional and Community Partnerships - Regional cooperation will strengthen influence at the national level to improve environmental sustainability outcomes for our region. Community partnerships make the best use of finite resources and avoid duplication of effort or missed opportunities. Actions « Implement a process to ensure all (new or updated) Council strategies adequately reference or incorporate guiding principles for environmental sustainability and are consistent with the nine strategic outcomes referenced in this strategy.	Ensure the principles of the Environmental Sustainability Strategy are considered in the recommendations contained within this Mountain Bike Strategy.
	Mackay Tourism Destination Marketing Plan 2014	The Plan's vision is: *"By 2020 Mackay will be a community that values the liveability and vitality of its region and proudly invites visitors to explore its surprising range of leisure experiences."* The Plan's goals include: « Build awareness of the region's natural assets. « Retain and increase air access. « Increase average length of stay to 4.5 nights. « Be known as a major competitor in regional business and leisure tourism. « Establish a clear identity for the destination that embraces natural encounters, the city and the region's coastal and hinterland towns. This plan identifies soft/relaxation/quiet satisfaction adventures seekers (incl. MTB) as an emerging visitor market and highlights 'soft adventure activities' (incl. MTB trails) as a secondary competitive advantage for the region. It also identifies the following competitive advantages which may be linked to mountain biking: « Wildlife encounters « Eungella National Park (secondary)	The potential for mountain biking as a tourism drawcard has been identified in this Plan. A mountain bike strategy should explore how it can contribute to the region's tourism goals, particularly considering natural assets/ encounters, the region's coastal and hinterland towns, and Eungella National Park.

Impact Level	Source	Key Information	Potential Impacts
LOCAL	Economic Development Strategy	The region's Economic Development Strategy identifies a vision for "a more diversified, vibrant and sustainable economy with a connected and engaged local business base and focused regional leadership." The Economic Development Framework for this strategy includes: « Coordinated and proactive regional planning « Create a positive attitude « Enhanced local business skills « Investment attraction One of the key signature projects for economic development highlighted in the strategy which may be of interest to mountain biking is activation of Pioneer Valley and Eungella.	The strategy should consider whether mountain biking can contribute to the economic development of the region in the context of the framework, and specifically to the activation of Pioneer Valley and Eungella.
	Mackay Regional Council Corporate Plan 2016-2021	Council's Corporate Plan identifies the following vision for 2021: « Pride in our community « Strong regional identity « Active and healthy community that is resilient « Build an informed, involved and connected community « Manage and deliver infrastructure that enhances our region « The natural environment is highly valued « An innovative organisation « A diverse and buoyant economy « Support local business « Our region is a major contributor to the development of northern Australia	Consider how this vision can be incorporated into a Mountain Bike Strategy for the Mackay region.
	Demographic Profile	The demographic profile of Mackay is characterised by the following key points: « The current population of 114,969 is expected to grow to 171,313 by 2036, an increase of 56,000 people. « The median age is the same as that for Queensland at 37 years. « Higher proportion of Indigenous residents compared with Queensland. « Higher income levels compared to Queensland « The Pioneer Valley is set to absorb a significant amount of the region's population growth as the third largest growth area in the region (an additional 5,000 people by 2036) and second largest rate of growth (60% increase in population projected to 2036). « The average median age indicates that the future planning will need to consider a wide spectrum of users. However, the 65+ age group is projected to increase by 88% by 2036. « Over one-third of the population are obese, signalling there is an increased need to provide opportunities for the community to participate in sport and recreation activities. « Mackay has a relatively low level of disadvantage, however there is a high level of unemployment at 7% of the population, and approximately one-third of residents earning less than $650, it will be important for the strategy to incorporate opportunities for residents with limited income.	Population growth would indicate an expected growth in MTB riders locally. The Pioneer Valley is set to be a key location for population growth in the region. Obesity levels in the region suggest that continued emphasis on provision of a variety of physical activity opportunities to engage sedentary residents is important.

Impact Level	Source	Key Information	Potential Impacts
LOCAL	Mountain Bike Possibilities for Mackay, 2015 (MADMTBC)	This report is an early piece of work designed to facilitate investigations into developing trails within the region. Some of the ideas and opportunities put forward in the report were purely conceptual ideas for further exploration and the club has indicated that they are not committed to implementing all these ideas. As such, they acknowledged that many of the opportunities identified in the report are no longer favoured or relevant. The report lists a number of projects/possibilities for the Mackay region. Of these, the following projects and priorities align with the opportunities in our report: First Round Projects: « Mt Kinchant (50km west of Mackay) « Crediton State Forest, Eungella (100km west of Mackay) Second Round Projects: « Finch Hatton/Teemburra Dam, Pinnacle (100km west of Mackay) Mt Kinchant « Report outlines a 5-stage development plan moving forward. « Provides a series of conceptual designs for XC and DH trails, based on the areas and trails that were used in the past for riding and racing.  Existing downhill track and access road at Mt Kinchant Mountain Bike Park  Proposed XC trail network stages	The concepts proposed should be considered in this study.

Impact Level	Source	Key Information	Potential Impacts
LOCAL		 Proposed future downhill track inclusions Crediton State Forest, Eungella, Finch Hatton/Teemburra Dam, Pinnacle « Report splits this into 2 separate projects: • Crediton State Forest, Eungella • Finch Hatton/Teemburra Dam, Pinnacle « Majority of the attention on this area is focused on the area between Eungella and Broken River. « Presents a series of concept maps that support development in this area but doesn't show any linkages to Finch Hatton.	
	Upper Pioneer Valley – Adventure Tourism Conceptual Master Plan, 2017 (MADMTBC)	The purpose of the report is to propose an idea for an international Eco/adventure tourism venture for the upper Pioneer Valley west of Mackay. The proposals comprised of multiple components: « A proposed Skyrail system from Finch Hatton to Eungella; « Three MTB parks linked together: • Broken River Diggings Park; • Bee Creek Park; • Finch Hatton Gravity Park; « Three epic, wilderness, back-country rides from 50-100km in length Discusses complimentary activities including: « Toboggan/Luge run; « Gravity Karts; « River Canoeing; « Bush Walking; « Elevated Forest Canopy boardwalks; « Bridge/Canyon Swing; « Bungee Jumping; Trails costed at $35/m;	The concepts suggested should be considered in this study.



4 TRENDS ANALYSIS

4.1 PARTICIPATION

4.1.1 MOUNTAIN BIKING IN MACKAY

Mackay & District Mountain Bike Club (MADMBTC) membership has grown steadily from a membership of 32 in 2009, to 293 members in 2018 (see Figure 1).

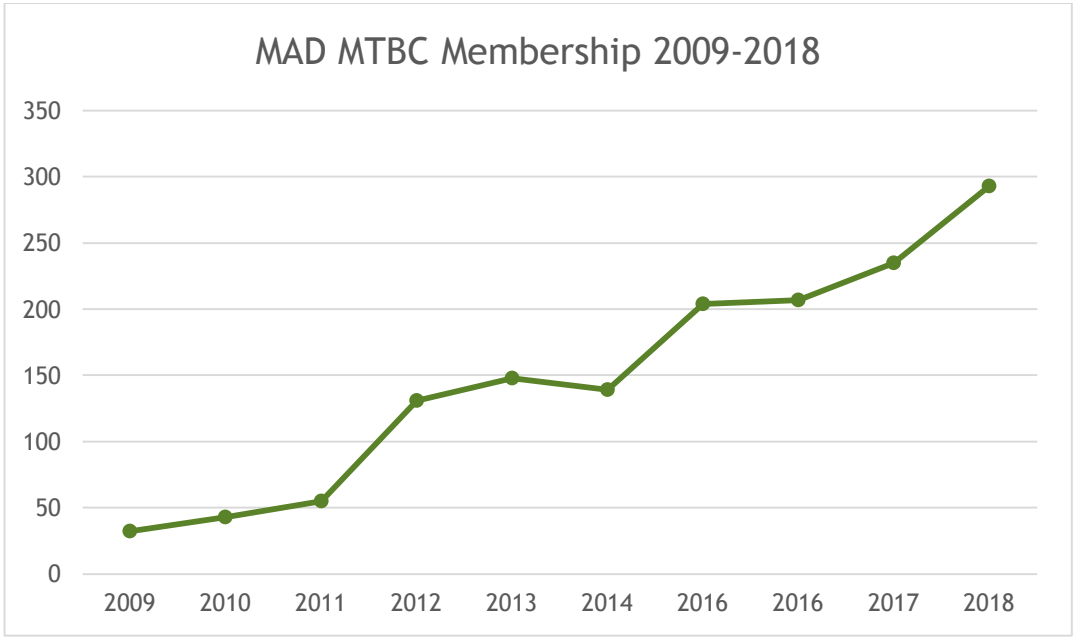


Figure 1: Mackay and District Mountain Bike Club membership 2009-2018 (Source: MTBA)

The 2018 club membership figure represents a participation rate of 0.25% based on the population of the Mackay LGA. This rate of participation compares favourably against a participation rate of 0.01% for Queensland based on club memberships, suggesting a solid club participation base in the region.

It is important to note that a large proportion of MTB riders are informal participants who are not members of a club or association. This corresponds with contemporary sport and recreation participation trends. Therefore, these membership figures are unlikely to represent the full scale of MTB participation in the region.

MADMTBC held 19 events in 2017/2018, attracting a total of 1066 riders across the events (Source: MTBA). Events included introductory/ fun races, club series races, and a Cross Country State Titles event.

4.1.2 QUEENSLAND SPORT, EXERCISE AND RECREATION SURVEY ADULTS (QSERSA)

The Department of National Parks, Sport and Racing commissioned the Queensland Sport, Exercise and Recreation Survey – Adults (QSERSA) in 2015. The survey sought to collect data to a regional level about participation in sport, exercise and recreation.

Key statistics relating to mountain biking include:

- Mountain biking has a participation rate of 3%.
- In the northern region (which includes Mackay) the participation rate is 2%.
- The participation rate is higher amongst 18-29 year olds and 30-44 year olds (3% and 4% respectively).
- The participation rate is higher for males (4%) compared to female (1%).
- Distance travelled to activity – average distance 5km to less than 10km; 53% less than 10km; 30% more than 10km.

4.1.3 AUSTRALIAN MOUNTAIN BIKE MARKET PROFILE – SURVEY DATA

This 2016 nation-wide survey was undertaken to build a greater understanding of the demographics and behaviours of MTB users in Australia. The survey achieved a sample of 4019 respondents.

Key findings of this survey which provide an indication of the Australian mountain biking market profile include:

- **Gender:** An overwhelmingly larger male participation (84%), however an increase in female participation from 2014-2016 of 5% is evident.
- **Age:** Largest age group is 35-44 and 25-34, although both decreased from 2014-2016, suggesting growth in other age groups, specifically 12-17 years and 45-54 years.
- **Income:** Largest income bracket was $60-79k (decreasing) followed by $80-99k (increasing).
- **Bike ownership:** Most respondents own one (40%) or two (32%) bikes.
- **Expenditure:** The value of bikes was most commonly $7000+ (19%) or $3000-3999 (18%) and the most common amount spent on bikes and equipment annually was an average of $1000-$2999.

An important disclaimer for this survey is that it is understood that the sample of this survey is represented heavily by elite or "hard core" riders and may not be representative of the recreational rider.

4.1.4 QUEENSLAND MOUNTAIN BIKE STRATEGY USER SURVEY

In 2017 a mountain bike user survey was conducted as a part of the development of the Queensland Mountain Bike Strategy. The survey was distributed via MTBA's membership database, Queensland Outdoor Recreation Federation (QORF) member newsletter and Facebook and 825 individual responses were received. The following summarises the key findings of this survey.

Survey Sample summary:

- 67% of survey respondents reside in South East Queensland.
- 81% male, 19% female.
- 36% in 35-44 age group.
- 76% member of an MTB club, trail care group or MTBA.

Travel preferences:

- Furthest distance travelled to visit an MTB destination in previous 12 months - another destination in Queensland (41%); international destination (27%); interstate destination (26%).
- Duration of trip – 2-3 nights (36%) or a day trip (35%) in Queensland; 23 nights (39%) or 4-7 nights (31%) interstate; and more than 7 nights for an international destination (53%).
- Travel distance to local trails - 90% of respondents travel for 30 minutes or less (higher than Australian survey results at 70%); 10-20 minutes (37%); 20-30 minutes (27%); less than 10 minutes (26%).
- Travel in Queensland for MTB – at least once every few years (94%); monthly (38%).
- Travel interstate for MTB – at least once every few years (65%); monthly (26%) .
- Travel overseas for MTB – once a year or less (39%); never travelled overseas for MTB (55%).

Participation

- Type of rider – independent (33%), Enthusiast (27%).
- Frequency – two to three times per week (63%), once per week (31%). These figures are higher than the Australian survey.
- Group size – small group of 2-4 (64%); most often ride solo (36%); large groups (10%).
- Primary motivators/ attractors for riding - mental health benefits (51%).

Trail preferences

- Cross country (57%) downhill (34%).

4.1.5 QUEENSLAND MOUNTAIN BIKE USER SURVEY: AN INTERIM REPORT OF FINDINGS

In 2013, Queensland Outdoor Recreation Federation (QORF) conducted a survey of MTB riders in Queensland. 2076 survey responses were received. Key results of this survey suggest the following points may broadly represent the composition and preferences of existing domestic riders in Queensland[3]:

- **Who rides:** Vast majority are males aged between 26 and 50.
- **Frequency:** 2-3 times per week (50%), once a week (27%).
- **Type of riding:** 'Cross Country (Fire Trails and single track)' followed at a distance by 'All mountain' and 'downhill and/or 4x'.
- **Reasons for riding:** 'fitness and/or exercise', 'fun', 'experience the bush and outdoors' and socialise with friends.
- **Length of ride (time):** 2-3 hours followed by 1-2 hours. Only 1.5% ride for under an hour.
- **Ideal length of ride (distance):** 21-30km and 10-20km.
- **Ride inhibitors:** 'lack of time', 'lack of close, legal trails/ 'trails are too far away to regularly ride', and 'lack of trails that suit my preferred riding style'.
- **Participation in organised events:** Around 65% participate in at least one organised event a year and a quarter do not participate in any organised events.
- **More tracks with desired level of difficulty:** 'Blue-moderate difficulty single track with moderate trail features' was the most popular level of difficulty respondents would like to see more of (83%) followed by 'Black-difficult single track and downhill with difficult trail features. Only 10% wanted more 'white – very easy, open, wide off-road trails'.
- **Support infrastructure:** riders most commonly identified 'signposted trails and trail head maps' as extremely important or important. Drinking water was also identified as extremely important and 'good car parking' as important. 'A place to rent bikes' and 'café or shops' were considered the least important.
- **Reason for riding trails:** Close proximity is a key reason for trail choice with 75% of respondents nominated 'close to home' as a key reason for riding the trails they do. This was followed by 'enjoy the trail design', 'suitable for my ability' 'length of trail' and 'its close by and legal for me to ride'.
- **Future riding experiences in Queensland:** Nearly 80% of respondents want to see more 'single track circuits' in Queensland, followed by 'trails close to regional towns or the city' (65%).
- **Trail attributes:** Attributes most commonly identified as extremely important were 'quality of trail e.g. trail flow', 'built technical trail features e.g. jumps, berms' and 'technical challenge'.
- **Method of finding trails:** 84% of respondents find out where to ride via 'word of mouth' and 69% via the internet'. 'MTB Dirt', 'trail guide book' and via clubs were also common responses. QPWS and Council maps were the least used methods.
- **Distance to travel:** The largest proportion of respondents indicated they would travel 'up to 100km' for trails varying in length from 31km to 50km plus. For trails up to 20km in length, respondents would most commonly only travel 'up to 25km'. Nearly 40% of respondents indicated they would travel '200km plus' to ride an 'iconic experience' and 31% indicated they would travel '200km plus' for competitions/ events'.
- **Fee:** 85% of respondents indicated they would be happy to pay a small fee for parking at a trail network if the money was to be re-invested into trail maintenance or trail facilities.

4.1.6 WORLD TRAIL MTB RIDERS SURVEY

In 2013 World Trail undertook a survey of 1300 MTB riders. The survey canvassed a range of different areas relating to MTB, but many of the results provide a useful insight into the demographics, riding and spending habits of Australian MTB riders. The findings of most relevance to this project are summarised below:

- Riding preferences:
  - 84% engage in cross-country MTB
  - 58% engage in all-mountain[4] MTB
  - 38% engage in downhill MTB
- Annual spending on MTB:
  - 14% spend $0 - $1,000 on MTB annually
  - 36% spend $1,000 - $3,000 on MTB annually
  - 28% spend $3,000 - $6,000 on MTB annually
  - 15% spend $6,000 - $10,000 on MTB annually
- No. of riding companions:
  - 7% generally ride on their own
  - 63% generally ride with 1 – 3 riding companions
  - 25% generally ride with 4 – 6 companions
- Other activities undertaken while visiting MTB destinations:
  - 76% generally visit cafes/bars/restaurants while visiting an MTB destination
- Likelihood to use a commercial shuttle service while on MTB holiday:
  - 67% would use a commercial shuttle service for MTB riders while visiting an MTB destination

3 Although the results provide a sample of Queensland riders, the majority of respondents reside in South-East Queensland, with only 6% residing in North Queensland. Therefore, the results may not reflect the actual characteristics of the Mackay MTB scene.

4 This term isn't commonly used anymore, but is analogous to gravity enduro in some ways, but is generally not a competitive discipline.

- Previous MTB holiday:
  - 82% had been on an MTB holiday (defined as an overnight stay somewhere with the primary purpose of the visit being MTB)
- No. of MTB holidays per year:
  - 33% go on 1 – 2 MTB holidays per year
  - 33% go on 3 – 4 MTB holidays per year
  - 14% go on 5 – 6 MTB holidays per year
  - 7% go on 7 – 9 MTB holidays per year
  - 13% go on 10+ MTB holidays per year
- No. of nights stayed while on MTB holiday:
  - 73% stay for 1 – 2 nights
  - 23% stay for 3 – 5 nights
  - 4% stay for 6+ nights
- No. of companions on MTB holiday:
  - 74% travel with 2 – 5 companions on an MTB holiday
- Spending on a typical MTB holiday:
  - 26% spend $0 - $500
  - 42% spend $500 - $1,000
  - 25% spend $1,000 - $3,000
  - 6% spend $3,000 - $6,000
  - 1% spend $6,000+
- Combined household income:
  - 11% = $60,000 - $80,000
  - 17% = $80,000 - $100,000
  - 18% = $100,000 - $120,000
  - 11% = $120,000 - $140,000
  - 11% = $140,000 - $160,000
  - 8% = $160,000 - $180,000
  - 14% = $180,000+
- Age:
  - 3% aged 17 or below
  - 4% aged 18 – 20
  - 18% aged 21 – 29
  - 42% aged 30 – 39
  - 23% aged 40 – 49
  - 7% aged 50 – 59
  - 2% aged 60+
- Gender: 10% female; 90% male

4.2 MOUNTAIN BIKE INDUSTRY

When discussing trends in the mountain biking industry, it is necessary to firstly break down what is meant by 'the MTB industry'. Essentially, the MTB industry can be thought of as a conglomeration of different business areas, including:

- Bike and equipment manufacturing and retail.
- MTB event organising (both competitive and recreational).
- MTB guided tours and skills tuition.
- Commercial shuttle operations (including the use of chairlifts as uplift facilities).
- Provision of traditional tourism services targeting MTB tourists (accommodation, food and beverage, etc.).
- Trail design and construction.

While the MTB industry is quite diverse, the trends in the industry tend to cross the various different business areas, with each influencing, and being influenced by, the others. For example, the popularity of the enduro World Series (the highest level of gravity enduro racing) influences the development and manufacturing of gravity enduro bikes, leading to an increase in the consumer uptake of such bikes, which in turn leads to increases in local attendance at similar events, which in turn leads to the development of more gravity enduro trails. These various factors all influence, and are influenced by, each other.

4.2.1 GROWING POPULARITY OF GRAVITY ENDURO EVENTS

- Gravity enduro racing appears to be among the fastest growing competitive disciplines. This wave of popularity is thought to be because gravity enduro is closer to the type of riding that the majority of people like to do with their friends - riding the descents as fast as possible, and then riding together on the climbs and socialising. With the Enduro World Series visiting Australia for the first time in 2017 (with a planned return again in early 2019), this may help to explain the strong growth in this discipline.
- The flipside to increasing growth in gravity enduro racing seems to be a decrease in participation in more traditional cross-country competitive disciplines. It is not clear if this is an accurate assessment, or simply a snapshot in time. Despite this, cross-country MTB racing remains the most popular discipline around Australia with more events and more competitors than other disciplines.

4.2.2 BIKE DEVELOPMENT

- Typically, the most popular mountain bikes in the market today have 29 inch wheels, tubeless tyres, hydraulic disc brakes, 10-11 speeds (rear derailleur only) and front and rear suspension. The most popular frame materials are aluminium and carbon fibre, with steel and titanium less common, but still not uncommon. The modern MTB is low maintenance, light, responsive and forgiving.
- Improvements and decreasing production costs in electric battery and motor technology is driving the increasing penetration of E-bikes (electric bikes) into the market. E-bikes are also referred to as pedal assist bikes – that is, the battery and motor supply power to the drivetrain when the rider is pedalling, providing assistance to the rider, increasing the average speed and extending the range for the average rider. They do not have a throttle like a motorbike and don't really allow riders to ride faster than a skilled rider already can. The main impact of E-bikes is that riders who believe they are too old, too unfit, too inexperienced or are otherwise not capable of going MTB riding, are now able to experience the sport using an E-bike. The real benefit of E-bikes therefore is that they have the potential to expand the potential market for MTB trails, beyond the stereotypical adventure/thrill seeking mountain biker cliché.

4.2.3 GRAVITY FLOW TRAILS

- Increasingly, destinations are looking to invest in gravity flow trails. These trails have some cross-over with the gravity enduro phenomenon but are usually more targeted towards beginner-intermediate level riders. The key elements of gravity flow trails are:
  - Long descents, with minimal climbing.
  - Typically shuttle accessed, point-to-point trails.
  - Low – moderate gradients (say 5-10%)
  - Lots of berms, rollers and rollable jumps.
  - No need to pedal or brake hard, unless you choose to.
  - Anyone with basic bike handling skills can ride a gravity flow trail, but experienced riders ride faster and hit jumps/gaps that inexperienced riders don't even see.
- This style of trail is tapping into a growing market segment that wants to be uplifted to the top of the hill via vehicle (or other means such as chairlift), experience wilderness and forests through long, rolling descents and enjoy an MTB experience that is high on thrills and enjoyment and low on hard work, sweat and exertion.



Figure 2: Gravity Flow Trail, Blue Derby, Tasmania (photo credit: Flow Mountain Bike)

4.2.4 INCREASING WOMEN'S PARTICIPATION

- Women's participation in MTB is growing slowly, but many commercial tour operators are actively looking to exploit and expand this market through product packaging and cooperative marketing. For example, over the last two years Mt Buller Alpine Resort in Victoria has offered a women's MTB weekend called 'Mind, Body, Bike' that includes social rides, guided tours and skills tuition, with additional optional elements like food and wine, yoga, cooking classes, massage and mindfulness.
- A wide range of women's specific products are now available from bikes to apparel to accessories. Performance, pricing and styling is on par to men's products. Some of the larger manufacturers are actively pursuing this market through a variety of avenues, including appointing everyday women that ride MTB and represent that ethos of the brand as 'brand ambassadors'.

4.2.5 GROWTH OF PUMPTRACKS

Pumptracks are becoming more common. Once hidden in backyards of only the most dedicated MTB riders, pumptracks are now being constructed at the trailheads of MTB destinations and in urban areas where local governments are seeing the value in this emerging form of recreational infrastructure. While traditionally constructed with soil, crushed rock or clay, the modern, best-practice pumptracks are being constructed with a smooth, low maintenance asphalt surface, sub-surface drainage and landscaping elements including vegetation, turf, lighting, shelters, bench seating and more.

The key benefits of asphalt pumptracks are:

- They can be constructed for low budgets.
- They can be constructed in small areas.
- They can be constructed quickly.
- They can be used by bikes (BMX, MTB, balance bikes, kids bikes), skateboards, scooters and even in-line skates.
- They have lower inherent risk than skate parks – there are no 'falls from heights', no sharp edges, no forced risks. All obstacles are rollable.
- Minimal maintenance and lifespan approaching 15 years.
- Excellent environment for learning bike handling skills.
- Suitable for all ages and all skill levels.

4.2.6 INCREASING ACCEPTANCE OF MTB AS A LEGITIMATE MAINSTREAM SPORT

- While MTB has been in the Olympics now since the Atlanta 1996 Olympic Games, it is reaching a new level of acceptance as a mainstream sport. Its rise coincides with a decrease in popularity of many traditional, structured sports.
- Specific children's MTB programs are growing in popularity all around Australia. This is possibly part of a broader effort to address physical inactivity and obesity in children. Parents and teachers may see MTB as a means of engaging young people in an activity that promotes physical activity and exposes them to the outdoors.





Figure 3: Pump Track in Gladstone (Credit: World Trail)

4.2.7 GROWTH OF MTB TOURISM AS ECONOMIC DRIVER

« MTB tourism is tourism where the primary purpose of the visit is MTB. It is similar to many other popular adventure/ outdoor sports, like snow skiing, scuba diving, rock climbing, surfing and golf. Enthusiasts of these sports organise their holidays around their preferred sporting activities.

« Previously, many Australian MTB riders looked overseas for their MTB holidays. Destinations such as Canada, USA and New Zealand offered some of the world's leading MTB destinations. While these destinations are still among the world's best and no doubt on the wish lists of many Australian riders, the quality and size of some Australian trail destinations is now comparable to these overseas destinations, convincing many Australian MTB riders to spend their money in Australia instead.

« MTB tourism brings economic benefits. It brings money into the local economy and creates job opportunities as new businesses spring up to service the visiting riders. Section 5.2 of this report lists a number of successful Australian MTB destinations and provides benchmarks including estimates of MTB tourism visitation.

With the success of MTB destinations like Derby in Tasmania, Government agencies around Australia have started to appreciate the economic value that MTB trails can bring, particularly in rural areas of Australia, where many traditional industries are declining. Looking around Australia, there are many MTB tourism projects recently completed or currently underway, demonstrating the value and benefits that government agencies see in developing MTB products. These include:

- Victoria
  - Creswick - currently in planning stages. Seeking to construct around 100km of predominantly cross-country trails. $2.56M in funding secured.
  - Omeo - Funding has been secured to commence the construction of around 80km of mountain bike trails at Omeo. The $3M project is being partly funded by the Federal Government to create long-term jobs in the region.
  - Warburton - currently in planning stages. Seeking to construct around 100km of cross-country and gravity trails. Seeking around $12M in funding, with some funding secured.
- Queensland
  - Gold Coast - MTB research project underway with the next stage being a strategy to develop the Gold Coast as an MTB destination. An audit of trails and signage is also underway at Nerang National Park.
  - Wangetti Trail - currently in planning stages. Seeking to construct around 100km of shared-use walking and MTB trail to become new iconic multi-day wilderness experience. Seeking around $20M in funding, with funding secured for detailed design and some construction funding.
- Northern Territory
  - Alice Springs - NT Government recently announced a plan to design and build the Red Centre Adventure Ride in the West MacDonnell Ranges. Due to be completed at the end of 2019. Funding of $12 million secured.
- Tasmania
  - St Helens - planning stage complete, with construction expected to start soon. Around $4.5M in funding secured for construction.
  - Kentish - currently in planning stages, with construction expected to start soon. Seeking to construct around 100km of MTB trails. Seeking around $4.1M in funding, with some funding already secured for Stage 1 of construction.
  - Derby - 30km expansion of the trail network currently underway. Funding secured, with works due for completion by end of 2018.
  - Maydena - new MTB park opened in January 2018 in southern Tasmania, predominantly focused on gravity and advanced riding, but with some limited cross-country and beginner trails.
- South Australia
  - Adelaide - planning and works underway to develop and position Adelaide as leading MTB destination.
- New South Wales
  - Jindabyne - NSW government recently announced plans to extend the Thredbo Valley Track all the way to Jindabyne. $9.8M in funding secured.
  - Wollongong - planning works underway to look at developing Mt Keira at Wollongong as a major MTB tourism destination. Illawarra Escarpment Draft MTB Master Plan has been released for public comment.
  - Orange - planning works underway to look at developing Mt Canobolas at Orange as a major MTB tourism destination.

4.2.8 TRENDS IN MACKAY REGION

Although the Mackay region does not have any mining activities, it acts as a service hub for the resource sector in nearby regions. However, the downturn in the resource sector in recent years, combined with an acknowledgement of a historical general overreliance on mining and agriculture to power the region's economy, underpins a new drive for economic diversification. Tourism is seen as a key contributor to this economic diversification.

Of particular note for this study, activation of the Pioneer Valley and Eungella has been identified as a key signature project which is a critical part of the region's economic development strategy.



Figure 4: Blue Derby trail, Tasmania (photo credit: World Trail)

5 BENCHMARKING ANALYSIS



5.1 THE MARKET

When considering MTB tourism, mountain bikers can be categorised into two groups – local mountain bikers and visiting mountain bikers.

5.1.1 LOCAL

Local mountain bikers are important for the development of the local MTB scene and culture, the development and maintenance of trails, the staging of events and generating demand for more trails, but they don't contribute significantly to the local economy in a tourism sense. Local riders use their local trail network in similar fashion to the way a footballer or netballer uses their sporting facility – turn up, train or compete, socialise and go home. They are extremely important however, as they are generally the nucleus around which the local MTB culture and eventually the MTB destination is built. They often end up owning or working in the businesses (bike shops, shuttle services, tourism and hospitality) that service the visiting mountain bikers and they provide advice, guiding and tuition to visiting riders. Some may even end up working in paid roles maintaining the trails.

5.1.2 VISITORS

Visiting mountain bikers on the other hand can make a significant contribution to the local economy through their consumption of local tourism services – a niche form of tourism called 'mountain bike tourism'. Similar to many other adventure and outdoor sports like golf, skiing, surfing and scuba diving, MTB riders will travel to undertake their sport and will spend considerable amounts of money in pursuit of the perfect trail. Many mountain bikers will focus the majority of their holidays around mountain biking.

From a tourism perspective, the MTB tourism market can be categorised in a number of different ways. It is often dissected by disciplines – cross-country, downhill, gravity, enduro etc. A more useful way is to group riders according to their level of participation, motives and how they identify themselves, as outlined Table 2 below.

Table 2: MTB Tourism Market Segments[5]

Type	Experience Sought	Classification Sought	Market Potential
Leisure	Includes general cyclists of all ages and abilities and potentially the largest market. They ride infrequently, often have limited skills and require very accessible trails. Not members of clubs and more likely to use highly accessible routes close to home or make the journey to trail facilities with amenities and services such as bike hire, cafés and toilets.	Generally seek White (Easiest) and Green (Easy) classification trails. Progress to Blue (Moderate) trails.	Large
Enthusiast	Purely recreational mountain bikers with moderate skills and variable fitness, and ride weekly. They are typically aged 29-49 and form the existing market majority. Typically don't compete in events and possess limited outdoors experience. Prefer trails with good trail signs, seek technical but not too challenging trails. Most likely to take short breaks to mountain bike.	Mostly Green (Easy) and Blue (Moderate) classification trails. Progress to Black (Difficult) trails.	Moderate
Sport	Competitive mountain bikers, who ride regular routes multiple times a week and are members of mountain bike clubs. They are a small but influential market. They are willing to seek less accessible trails, have a high fitness level and are technically proficient but may have limited outdoor skills. They ride a very wide variety of trails.	Green (Easy) to Double Black (Extreme)	Small but influential
Adaptive mountain biking	Riders with mobility challenges who require modified or specialised riding equipment to participate, such as hand cycles. There is an emerging group of people who use off-road hand cycles to participate.	All Classifications as per the Adaptive Trail Rating (ATR) system	Small
Independent	Skilled outdoor enthusiasts who ride once a week and are technically proficient with good level of fitness. Generally a small market. Often involved in other outdoor activities, capable of planning their own rides and ride a very wide variety of trail classifications. Adventure is more important than the technical challenge and they seek more remote trails.	White (Easiest) to Black (Difficult)	Small
Gravity	Highly skilled technical riders who seek very challenging trails, typically ride at least once a week and are often members of clubs. They represent a small market that requires purpose-built trails often with an uplift facility, which are repeatedly used in a concentrated manner. Gravity riders seek specific trails with the highest classifications.	Blue (Moderate) to Double Black (Extreme)	Small

5 Adapted from the Master plan for Mountain Biking in the Northern Territory by TRC Tourism, 2016.

5.2 LEADING DESTINATIONS

There are many destinations around the world that provide best practice examples of MTB destinations. The list typically includes:

- Whistler, Coast Gravity Park, Vancouver in Canada;
- Moab, Crested Butte, Park City, Fruita, Bend in USA;
- The Seven Stanes in Scotland;
- Morzine, Les Gets in France;
- Rotorua, Nelson, Queenstown in New Zealand;
- Derby (TAS) in Australia.

The European, Canadian and US examples have all been in operation for many years and are acknowledged success stories. Many documents have been produced citing the economic benefits of these destinations and quantifying visitation and other metrics, however, the value of applying these to the Australian context is questionable. Rather, it is more valuable to consider examples closer to home. Table 3 below reviews Australian and New Zealand examples.

Table 3: Leading MTB Destinations in Australia and New Zealand

Destination	Location	Trail Style & Difficulty	Trail Network Size	Visitation	Other Measures of Success
Forrest, Victoria	1.5 – 2 hours' drive from Melbourne	Cross-country Mostly beginner – intermediate.	Approx. 65km	Approx. 22,000 in 2013[6]	« Substantial increase in the number of 'MTB specific' accommodation offerings available. « Very successful micro-brewery commenced operation after the trails were established, largely based around the patronage of MTB riders. Business still in operation, and continuing to grow.
Smithfield, Queensland	15-20 minutes' drive from Cairns	Cross-country and downhill Intermediate to advanced. Very little beginner trails.	Approx. 25km	Approx. 33,600 from April 2017 to April 2018 Average of 85 riders per day[7]	« While only small, the Smithfield trail network has hosted the highest level of competition possible – since the 1990's it has played host to 4 rounds of the UCI World Cup and 2 UCI World Championships. « Track counter is operated by World Trail and is placed on one of the entry trails into the cross-country trails. As such, it wouldn't represent any of the downhill usage, as these riders enter via different routes.

6 Personal communication with Colac Otway Shire.

7 World Trail data from trail counter placed on Smithfield trails.

Destination	Location	Trail Style & Difficulty	Trail Network Size	Visitation	Other Measures of Success
Derby, Tasmania	1.5 hours' drive from Launceston	Primarily cross-country, some gravity enduro/ gravity flow trails All difficulty ratings.	Approx. 85km	30,000 in 2017[8]	« Coverage in many mainstream media programs and publications. « Numerous tourism awards. « Hosted a round of the Enduro World Series (EWS) in 2017 and will do so again in 2019. « One of the trails (Detonate) named '2017 Best Trail in the World' by the Enduro World Series athletes. « Real estate prices have estimated to have doubled since trails opened. « Volume of real estate sales has doubled or tripled in that time. « Net movement of people (including families) into the town. « Substantial increase in number of businesses in operation, with more applications for new businesses. « Estimated to have an annual net impact of $15-18M annually to the local economy[9].
Munda Biddi Trail, Western Australia	1 hour drive from Perth	Cross-country	1000km long wilderness, adventure trail	88,000 (includes 41,000 day trips 47,000 users staying overnight).	« While not a bike park or purely for mountain bikes, the Munda Biddi Trail is definitely on the bucket list for many cross-country mountain bikers. « It has been operational for over 10 years and continues to grow in length, quality and reputation.
Queenstown, New Zealand	5 hour drive from Christchurch	All styles/ disciplines catered for. All difficulty levels catered for.	Extensive	52,904[10]	« Statistics are from a study in 2017 that focussed on one particular cross-country style trail – the Queenstown Trail. As such, the results probably under represent the overall picture of MTB usage in the region, especially the gravity focussed elements. « Spending linked directly to use of the trail generated $27.7 million and 149 full time equivalent jobs.
Rotorua, New Zealand	2-3 hour drive from Auckland	All styles/ disciplines catered for. All difficulty levels catered for.	Approx. 145km	Approx. 102,000 in 2009.	« Mountain biker expenditure in the local economy totalled around $8.6M in 2009[11] « Rotorua hosts 'Crankworx Rotorua' one of the biggest and most prestigious MTB events outside of the UCI World Cups and World Championships. In 2016 the week-long event attracted 15,439 visitations and generated a total output (i.e. revenue inclusive of all multiplier effects) of NZ$8M[12].

8 Personal communication with Dorset Council.

9 www.abc.net.au/news/2018-04-21/world-class-mountain-bike-trail-transforms-derby-from-ghost-tow/9677344

10 'Review of The Queenstown Trail: Economic Impacts and Trail User Satisfaction', TRC Tourism, July 2017.

11 'Recreational Use and Economic Impact of Whakarewarewa Forest – 2009 Update', APR Consultants Ltd, March 2010.

12 '2016 Crankworx Rotorua: Economic Impact Assessment and Visitor Analysis Of The Event On Rotorua' by Apr Consultants Ltd, June 2016.

MTB destinations can be categorised according to their significance. MTBA's Queensland Mountain Bike Strategy recognises three levels of MTB site significance: National, regional and local. Nationally significant sites can capture an international market, and regional sites can also capture a state market.

Table 4 describes these categories and provides examples.

Table 4: MTB Destination Significance

	National	Regional	Local
Description	**A mountain bike facility designed for a large population centre and/or a tourism resource that caters for at least a week of unique riding opportunities.** Nationally significant locations capture the tourism market for at least a week of unique riding and can provide a large recreation resource for a major population centre. They are developed to cater for international, interstate and intrastate tourism as a priority and facilities fall within a 20-25km zone. Trail development is focused around a primary trail town model and can include trail centres, networks or individual trails as part of the hub. Excluding long distance trails, locations should contain over 80km of trail with the majority being singletrack, forming at least four major loops. Locations of national significance should develop all trail types and classifications where appropriate. These locations will experience very high demand and should provide a high level of services and infrastructure to riders, and also have the ability to cater for major international and national events.	**A mountain bike facility for a small population centre or large community and/or a tourism resource that caters for short breaks or weekend trips.** Regionally significant locations cater for small population centres or large communities and/or tourism resources that cater for short breaks or weekend trips. Facilities should be developed within a 15-20km zone and be focused around a primary trail centre or trail town model. They provide a minimum level of service and infrastructure and can host national and regional events. Excluding long distance trails, regionally significant locations contain at least 20km of trail with the majority being singletrack, forming at least two major loops. Locations of regional significance should encompass broad trail types and classifications. Regional locations will see demand for trails from surrounding nationally significant locations.	**A mountain bike facility for a small community and/or a tourism resource that caters for day trips.** Locally significant locations cater for community-based trail use with tourism demand limited to day visits. Facilities are developed within a 10-15km zone from population centres unless servicing existing recreation and camp sites, or significant population centres where alternate opportunities do not exist. Locally significant locations can develop around the trail town and trail centre models but can also be stand-alone individual and networked trail systems. They contain limited services and infrastructure but can still host events. Excluding long distance trails, up to 20km of trail may be developed with the majority being singletrack forming at least two loops. Locations of local significance may develop limited trail types and classifications and can expect demand from surrounding regionally and nationally significant locations.
Trail Quantity	> 80km	> 20km	< 20km
Tourism Market	Critical	Preferable	Non-essential
Recreation Resource	Preferable	Preferable	Critical
Singletrack	Critical	Critical	Critical
Accommodation	Critical	Preferable	Non-essential
Café	Critical	Preferable	Non-essential
Visitor Services	Critical	Preferable	Non-essential

	National	Regional	Local
Visitor Information	Critical	Critical	Non-essential
Car Parking	Critical	Critical	Critical
Toilets	Critical	Critical	Non-essential
Showers	Preferable	Preferable	Non-essential
Bike Sales and Repair	Critical	Preferable	Non-essential
Bike Hire	Critical	Critical	Non-essential
Trail Signage	Critical	Critical	Critical
Trail Mapping	Critical	Critical	Critical
Event Infrastructure	Critical	Preferable	Non-essential
Diversity of Trail Types	Critical	Preferable	Non-essential
Diversity of Classifications	Critical	Critical	Non-essential
Example sites	« Derby (TAS) « Rotorua (NZ)	« Hidden Vale (QLD) « Atherton (QLD) « Thredbo/Jindabyne (NSW) « Falls Creek (VIC) « Bright (VIC) « Stromlo Forest Park (ACT) « Fox Creek (SA)	« Mackay (QLD) « Daisy Hill (QLD) « Gap Creek (QLD) « Anglesea (VIC) « Beechworth (VIC) « Bendigo (VIC) « Eagle on the Hill (SA) « Harcourt (VIC)

6 BEST PRACTICE PRINCIPLES



In 2008 Tourism British Columbia released a publication called 'Mountain Bike Tourism' which came up with the following formula for MTB tourism success:

"Success = Great Trails + Bike Infrastructure + Service/Hospitality"

Whilst simplistic in its message, it got one thing absolutely 100% correct: Great trails are essential – in fact they are the core product.

Best practice MTB destinations are exceptionally good at:

1. Attracting significant MTB visitation; and
2. Capturing economic benefits from the MTB visitation.

Visitation is influenced by many variables. These variables are discussed in more detail in Table 5 below.

Table 5: Important Variables in Attracting MTB Visitation

Significance	Examples
Quality of the trail network	Quality is paramount. While ultimately a riders' perception and enjoyment of a trail is a matter of opinion, the quality of the construction of a trail is not. For example: « Does the trail have proper drainage in place? If not, it will become boggy and degraded in a short time, damaging the trail but also impacting on the experience. « Is there adequate and sufficient signage in place? If not, riders will struggle to navigate their way throughout the trails and may become lost or confused. « Do the trails match their difficulty ratings? In some ways, the easiest trails are the hardest to construct as they require attention to detail, removal of obstacles, careful adherence to low trail gradients etc. « Are the trails spectacular? Do the trails facilitate easy enjoyment of the scenery? This means making sure that the trails reach all the landmarks and features within the landscape. It also means going above and beyond to construct lookouts and rest spots, with accessories like handrails, bike stands, seating, etc. « Are the trails landscaped? This might include rock walls, retaining walls, trail surfacing, rock armouring and rock features like jumps, chokes and corrals. Many of these features have important roles in trail sustainability, but also create a sense of high quality trail construction.
Extent of the trail network	The size of the trail network is an important consideration. The ideal goal is to create a trail network that can't be ridden easily in one day's visit, encouraging riders to make a return trip or to stay overnight. This is referred to as the 'Tipping Point' – i.e. the length of trail that can't be easily ridden in one day. The tipping point is generally somewhere between 30-50km of trail, but is influenced by topography, terrain, soils, style of trails and difficulty rating of trails.
Variety offered by the trail network	The best trail destinations offer a variety of trails to ensure they cater to the widest possible market of MTB riders. This means offering a variety of trail types/styles (including cross-country, gravity flow, DH etc.) and also a variety of trail difficulty ratings within each of these different trail types/styles. The wider the offering, the bigger the potential market of trail users. However, it is important to ensure that the majority of the trails cater to the largest demographic of riders – in other words, cross-country trails, rated Easy – More Difficult.

Significance	Examples
Location of the trail network	The location of the trail network in terms of its proximity and accessibility to the market is important, however remoteness and difficult access can also make a trail network seem more desirable and can also encourage longer stays. In a sport like mountain biking, remoteness can go hand in hand with a sense of wilderness and adventure, important motivators for the participants. Being too remote however, also means that there is unlikely to be a significant population of local riders, which is important for the ongoing development of the destination. The most popular trail destinations in Australia are within around 3-5 hours driving time from major capital cities and 1-3 hours driving time from large regional towns.
Marketing of the trail network	Being a non-traditional and still maturing sport in Australia, MTB has always occupied a low-key position in the mainstream sporting world. As such, most marketing of MTB destinations has been aimed at the dedicated enthusiasts and through dedicated MTB media such as magazines, websites and social media. However, marketing is becoming more commonplace with all the leading Australian MTB destinations recognising the value of marketing and engaging in some degree of marketing, albeit still largely targeted at the dedicated enthusiasts. More recently though there seems to have been some realisation that the dedicated enthusiasts are only a small portion of the full potential market and that there is a large untapped market of people who are keen and interested to try MTB, but don't identify as MTB riders. This realisation has been aided by the slow shift of MTB towards the mainstream, the maturing of the industry and vast improvements in bike technology, especially the development of E-bikes as discussed previously. Marketing can be undertaken by the manager of the trail network (i.e. the land manager, the local Council, alpine resort), but can also be undertaken by some of the businesses servicing the riders. An example of this is the Blue Derby Pods Ride, a high-end boutique accommodation offering guided riding and gourmet food and wine. This business is advertising in mainstream publications to try to capture people from outside the traditional MTB scene.
Supporting services and infrastructure	Supporting services and infrastructure includes accommodation, food and beverage, bike hire, shuttle services, visitor information centres etc. While these don't generally influence riders to travel to a destination, if they aren't in place they can be a deterrent to travel. For example, many car hire companies don't provide options to carry bikes securely, a significant deterrent for travelling MTB riders. Furthermore, exceptional businesses in this area can be an attraction in their own right – micro-breweries, unique accommodation offerings, the ability to hire and trial hire end MTBs etc.
Provision of information about the trail network	High quality information about the trail network (and supporting services and infrastructure) needs to be available and easily accessible to riders pre-visit. This is typically done through websites, but some destinations (like Blue Derby) are even developing their own smartphone apps with interactive trail maps, and that could be used to provide detailed information pre-visit.
MTB events	MTB events are an important motivator for many visitors and can often be the way that many riders visit a destination for the first time. This includes both elite (for example, the Enduro World Series held in Derby in 2017 and again in 2019, which is an elite level event, but attracts many, many spectators) and mass-participation events (for example, 24-hour cross-country enduro style events).
Availability of non-MTB tourism product	Having non-MTB tourism products available also adds to the attractiveness of a destination and broadens the market base. It increases the appeal of a destination particularly for the family/leisure segment, who may not want to ride every single day of their visit. It also means that there are other activities for non-riding members of the travel group, again making the destination more attractive for families or groups.
Maintenance and ongoing investment in the trail network	This variable is linked to quality – if a high-quality trail network isn't maintained, it won't stay that way for long. Well maintained trails always feel fresh, new and looked after and invite repeat visitation, contributing to the overall experience of visitors. Trail destinations need to keep investing in their trail network to ensure they remain current and progressive, providing reasons for people to return time and time again. This doesn't necessarily mean constantly expanding and adding new trails. Instead it might mean a rebuild of an existing trail, the addition of some optional ABC lines or jumps, the refurbishment of bridge or boardwalk and so on.

In order to derive economic benefit from that visitation, visitors need to have access to traditional tourism services and infrastructure such as accommodation, food and beverage outlets, retail, hire, guiding and tuition, and so on. While these services are essentially one of the main mechanisms of capturing economic benefit in the local region, they can also be a key variable in the attraction of the destination itself.

7 STAKEHOLDER ENGAGEMENT FINDINGS



7.1 COUNCILLOR WORKSHOP

Councillors were invited to attend a workshop to discuss opportunities and considerations for development of mountain biking in the Mackay region. The following notes summarise the discussion.

7.1.1 ISSUES

- Councillors are concerned land tenure will be a barrier. There is a need to ensure the study seeks to build an understanding of land tenure issues affecting mountain biking potential.
- There is currently a lack of facilities for mountain biking in the region.
- There are limited services near a proposed key site at Finch Hatton/ Eungella e.g. accommodation, restaurants/cafes etc.
- The road infrastructure between Eungella and Finch Hatton would need improvement and there are some rural areas past Eungella that that may be potential sites for mountain biking but have limited formal road infrastructure. Eungella Range Road is a particular issue due to an 11m length limit on vehicles which presents difficulties for the size of buses and trailers that can be used.

7.1.2 OTHER CONSIDERATIONS

- Council needs a better understanding of the MTB community.
- The Strategy needs to support all levels of users/ activity (local, regional and national).
- Pump track opportunities should be investigated.
- There is a need to understand the flow on opportunities i.e. what are the compounding benefits from the creation of mountain biking trails in addition to the trails themselves; and what other areas in the community could develop economic opportunities from the creation of the trails.
- Need to consider the viability of smaller trails.
- The study should identify the sites/locations and projects that are viable/ achievable.
- Study should seek to engage National Parks, Sport and Recreation and Queensland Parks and Wildlife Service.
- Need to consider the options for Mt Basset.
- Need to create a point of difference from other regional areas.
- There is a need to ensure we don't duplicate facilities provided in other regions.
- Councillors would like to understand if the market is seasonal, and if so, what is the season Mackay should market to?
- The study needs to explore shared spaces versus competition spaces.
- Investing in eco-tourism is the direction of Tourism Queensland.
- There is a need to understand and explore the potential for commercial operators.
- Amenities to support mountain biking activity are needed.

- Need to develop a brand for mountain biking. There is a need to understand what the cost implications are for marketing Mackay as a mountain biking destination.
- Council has a desire to support small businesses. Councillors recognised that the community within Eungella and Finch Hatton may not be currently ready to support the MTB community and they understand and are willing to support these businesses to ensure that the overall project/ strategy is viable, including helping to train/ support these businesses to have a better understanding of and greater ability to tap into/ service the MTB industry.
- We need to ensure this Mountain Bike Strategy links to state government strategies.
- There is a need to link MTB locations with complimentary areas via trails and road.
- We need to determine what the key improvement areas are.

7.1.3 OPPORTUNITIES

- Eungella is a key site for investigation.
- There may be mountain biking opportunities at Kinchant Dam.
- This is an opportunity to develop new income/ businesses for the local economy and Council e.g. a potential levy, similar to Derby (a levy on businesses to support the maintenance/ development of the industry in Mackay).

7.2 COUNCIL STAFF

A meeting was held with key staff from Council's sport and recreation, economic development and planning sections. A summary of the discussions held is provided below.

7.2.1 OPPORTUNITIES

- Teemburra Dam opportunities.
- Need to identify all possible areas with mountain biking potential.
- Need to identify the opportunities in the Northern areas of the LGA.
  - Bloomsbury Links - beach access and lodging opportunities.
  - Cathu Forest (State Forest) opportunities - currently not well maintained.
- Investment in Rowallan Park, Kinchant Dam and Eungella.
- Eungella Range Road is a state-controlled road - existing infrastructure is inadequate.
- Crediton State Forest to Eungella opportunities.
- Potential for trails on private land.
- Need to get the community involved early:
  - Eungella Progress Association;
  - Visitor Information Centre;
  - Scouts;
  - Pioneer Land Care.
- Working with other regional Councils to promote opportunities.

7.2.2 OTHER CONSIDERATIONS

- National parks don't aspire to maintaining tracks.
- Local MTB needs versus the tourism/ economic development needs.
- Need to connect the different locations – link trails vs trails:
  - Rail trails and river trail opportunities;
  - Mackay Sugar have use agreement over some sections of the rail corridor.
- Need to understand the land tenure issues.
- Need to have a staging approach for the strategy.
- Need to have GPS coordinates for trails .
- Want to understand - what is the spending ability of the market?
- Potential to connect to other outdoor recreation activities.
- Maintenance and management needs to be robust – can't be a volunteer model.
- Council need costing on maintenance.

7.3 MACKAY SPORT AND RECREATION ADVISORY COMMITTEE

- There is potential to leverage off the increased tourism visitation associated with mountain biking to deliver other opportunities for locals and visitors.
- How to incorporate the broader strategy into other activities in the area:
  - Does the MTB strategy conflict with other activities/ opportunities?
  - Potential link into the adventure race market (Zach Mach Adventure Challenge[13])
  - Paragliding opportunities
- Need to increase the accommodation stock.
- Consultation with the community will be vital.
- Changes to grant funding may improve grant opportunities for the project (eg economic development focus).

13 http://www.zachmach.com/

7.4 LOCAL MOUNTAIN BIKE STAKEHOLDERS

A meeting was held with key local mountain biking stakeholders including representatives of the Mackay and District Mountain Bike Club (MADMTBC) and local bike shops. A summary of matters raised during this meeting is provided below.

7.4.1 ISSUES

- Limited accommodation stock in the proposed areas:
  - Need to understand what the market desires for lodging;
  - Need to understand what support industry is required.
- There are limited existing tracks.
- Funding opportunities have not been identified yet.
- There is limited phone coverage towards Eungella Dam.

7.4.2 OTHER CONSIDERATIONS

- The current locations provide a blank canvas to start with:
  - There are limited formalised tracks.
  - Club use area provides approximately 20km of tracks.
  - Looking for more downhill options.
- Community need to understand how to capitalise on the emerging market.
- Need to link to other points of interest:
  - Strategy needs to identify how the trail destination areas would link;
  - Develop partnerships between Council and the Progress Association.
- Considerations for maintenance of the tracks:
  - Empower the local communities to maintain tracks;
  - They might have some complimentary skills and machinery;
  - May need to be professionally maintained to begin with;
  - Potential for a levy system to assist with cost.
- Marketing is key to the success of the trails.

7.4.3 OPPORTUNITIES

- Potential for a private/public partnership model.
- Potential for a 3-tier strategy.
  - Local domestic use:
    - Park upgrades in Mackay to encourage more MTB in town;
    - Different landscaping options;
    - Asphalt pump tracks;
    - Single use tracks close to townships.
  - Regional facilities:
    - Rowallan Park, Kinchant Dam;
    - Bring in users from other regional areas (Townsville/ Whitsundays etc).
  - Destination trails:
    - Eungella-Finch Hatton;
    - Interstate and International visitors;
    - Trail hub:
      - Centred around small towns;
      - Varied difficulties;
      - Trail head facilities;
      - 30 km flow track.
    - Need to identify the traffic management on the range.
- Eungella-Finch Hatton is a key destination.
  - The club's existing flow trail would be the "signature piece" for the mountain biking market in the region. Finch Hatton would be the main drop-off location.
  - A shuttle service would be required between Finch Hatton and Eungella.
  - Eungella business sector and community is looking to invest in more opportunities.
- Potential to partner with schools to incorporate into education.
- Progress association is on board with the concept:
  - Potential job prospects;
  - Getting the local community on board;
  - Opportunities to tie into history and niche markets.
- Signature event opportunities:
  - Mountain Marathon;
  - Potential trail network at the dams;
  - Eungella Flow trail is the signature trail.
- The majority of the club's existing flow trail from Eungella to Finch Hatton is on state forest.
  - Last 200m or so is on Private property.
  - Potential for partnership with the Eungella Progress Association to encourage private land use for MTB.
- Traditional Owners are keen to be involved and have identified opportunities including:
  - Job creation and maintenance.
  - Land management.

7.5 MACKAY TOURISM

A meeting was held with Mackay Tourism to understand the tourism context and specific opportunities for mountain biking. A summary of this discussion is outlined below.

7.5.1 ISSUES

- Identifying a unique selling point could be difficult to do in MTB in Mackay:
  - Might need to be clearer;
  - MTB is a very competitive space.
- Mackay has a poor image issue:
  - However, the region is growing the tourism product.
  - Mackay needs significant investment in existing infrastructure.
  - Need a catalyst to encourage more visitors to the region for MTB. It could be as simple as a high-profile rider using the trail(s) or it could include more investment to encourage tourism growth.
  - Need to develop a tourism mega-magnet.

7.5.2 OTHER CONSIDERATIONS

- Getting back to nature is the current motto for Mackay Tourism.
- Need to consider if the current MTB tourism market already too competitive?
- The strategy needs to clearly define the unique selling point of the MTB market, both nationally and internationally.
- Need to invest in education, messaging and marketing to be viable.
  - Tourism Mackay and Council to lead education.
  - Price strategy for Tourism membership.
  - Need a hero model/ opportunity to get the community involved.
  - There may be an appetite to encourage growth in the industry.
- The Mountain Bike Strategy fits into the Tourism strategy.
- The consulting team will need to work with the Traditional Owners on this strategy.
- There is a need to identify the target market.
- The strategy needs to consider opportunities for the core and holiday leisure markets. The core market includes MTB riders who travel to destinations for the purpose of Mountain Biking. The holiday leisure market (which is a significantly large market base) is where the primary reason for travel is leisure and could include mountain biking as an activity, along with other activities such as visiting the reef. In other words, MTB is not primary reason for visiting Mackay but the trip can contribute to the MTB industry.
- There is a need to invest in product development.
- Mackay Tourism would help lead community development of Finch Hatton and Eungella opportunities.
- The current market is a self-drive market.

7.6 MOUNTAIN BIKE AUSTRALIA

A discussion was held with Mountain Bike Australia (MTBA) to obtain their views on mountain biking in the Mackay Region. The following summarise the key points from this discussion:

- MTBA were in the process of finalising a Draft Queensland Mountain Bike Strategy at the time of this discussion. This Draft document has since been finalised. The Mackay region is identified as one of six priority regions for the state.
- MTBA have visited the Eungella-Finch Hatton area to discuss the opportunity for development of this area for mountain biking. MTBA are interested to learn more about this opportunity and offered in-principle support provided relevant feasibility/ business planning suggested it was a viable and high-quality opportunity.

7.7 QUEENSLAND PARKS AND WILDLIFE SERVICE

A discussion was held with the Mackay regional office of Queensland Parks and Wildlife Service. The following provides a summary of the key issues discussed:

- Mountain Biking is valued as an important recreation opportunity and QPWS is actively working with Councils and clubs across Queensland to progress opportunities.
- Local office has been working with the local MTB club on the Mount Kinchant Regional Park. It is anticipated that the club would take the lead to develop this site.
- Eungella-Finch Hatton opportunity:
  - Would need detailed exploration in terms of suitability and impact.
  - QPWS support major events.
  - If aiming at national/international significance, QPWS and other State Government agencies may adopt a leadership role if the project was considered a viable and valuable one.
  - Eco-tourism project would need to align with the government's Eco-tourism framework.
- Generally, QPWS are happy to support mountain biking and their role would vary depending on the site and purpose.
- Issues to consider:
  - Currently planning to review the Mackay Highlands Management Plan.
  - Conflicting uses and the suitability of shared tracks.

7.8 DEPARTMENT OF TRANSPORT AND MAIN ROADS

A discussion was held with the Department of Transport and Main Roads, with key points including:

- There are currently no plans to upgrade any roads in the Eungella/ Finch Hatton area.
- The impetus for considering new road upgrades would be projected usage figures and a cost-benefit analysis.
- The first step for consideration for the Eungella Range Road would be widening and sealing of road shoulders.
- The first 2 years of the Department's 5-year works program are fixed, so it is likely a timeframe of up to 5 years would be anticipated for any new works.
- The 11m length restriction is the only current limitation on the use of the Eungella Range Road.

7.9 TRADITIONAL OWNERS

Traditional owners are a key stakeholder for progression of the MTB market in Mackay. A meeting with held with a Yuwibara Traditional Custodian. The following summarises this conversation:

- General support for use of traditional lands for mountain biking activities, subject to more detailed consultation as proposals emerge.
- In-principle support for the Eungella-Finch Hatton trail network, subject to more detailed consultation as planning progresses.
- There will be a need for further, more detailed consultation with further Traditional Owner representatives during subsequent planning stages of any MTB trails.



Figure 5: Blue Derby trail, Tasmania (photo credit: World Trail)

8 REGIONAL AUDIT SUMMARY



8.1 MACKAY MTB SCENE

8.1.1 MADMTBC

There is only one MTB club in Mackay – Mackay and District Mountain Bike Club (MADMTBC).

As of September 2018, MADMTBC had 293 members. They estimate that their membership numbers only account for about 1/8 of the local MTB community. This would put the local MTB community at around 2070 people.

The club's riding and racing is largely focussed on cross-country (XC) riding, although this is potentially a reflection of the types of trails available, not necessarily the preferences of the riders. It is likely that the club could attract more riders if they were able to offer other types of riding and events.

The racing 'season' runs from March to November (given Mackay's tropical climate the dryer and cooler winter months offer the best conditions to ride).

MADMTBC runs 2-3 small, local events per month during the season. These club events are usually in the Olympic Cross-country (XCO) discipline, covering all categories and ages, including a special youth category called Dirtmasters (ages 6-9).

MADMTBC also runs some larger events:

- It has hosted the Queensland XCO State Championships for two consecutive years (2016/2017);
- It runs a multi-hour, cross-country endurance race called the MAD Rush, which has run for almost ten years consecutively;
- It helped run the Mackay and District Schools MTB teams event and the Capricornia Schools XCO event for the last two years and will do so again in 2018;

The club is also looking at the possibility of hosting a National XCO event and/or the XCO National Championships in the next couple of years.

MADMTBC has their unofficial home base and headquarters at Rowallan Park (discussed further in the following section). The club pays $1,600 annually for the use of a large shed (the clubhouse) and undercover sheltered space with seating, BBQs, bike washing and lighting. This facility is for the exclusive use of the club. It is also used as a canteen during competitive events. The club also pays an additional $350 per year for a shipping container that stores race and trail maintenance equipment.

8.1.2 MACKAY CHRISTIAN COLLEGE

Mackay Christian College (MCC) has embarked on a concerted effort to support their students to participate and develop in MTB. In 2016, the school was the first school to be awarded School of Excellence Certification by MTBA. MTBA describes the program as such:

"Some schools have elected to invest heavily in mountain biking as a school sports program. Riders in excellence programs are focused on competition and training the best of their ability. These schools offer structured MTB programs delivered by Level 1 coaching staff for at least 16 sessions per year. MTBA provides one funded place per year on our Level 0 Skills Instructor course and a 10% discount on subsequent coaching courses. Excellence schools are expected to hold one interschools MTB event per year with the assistance of their local club." [14]

8.2 LOCAL MTB TRAILS

The following techniques were used to identify the local MTB trails:

- Discussions with MADMTBC.
- Strava Heatmaps – Strava is an online fitness and activity tracking application. Strava users log their ride (or other activity using a GPS device) and upload it to the Strava website, where it is ranked against others in terms of speed. Strava collects huge amounts of data from its users about their activities, which is available to be viewed as a 'heatmap' – see Figure 6 below. Heatmaps indicate relative usage or popularity of a particular route or trail by the intensity/brightness of the line, thus providing a visual tool of where people are most frequently choosing to ride.
- Trailforks – Trailforks is a smart-phone app and website that provides information about locally available MTB trails. It includes options for users to add comments, photos and update information about trails; and other on-line research. Trailforks also links ride data to a user's Strava profile.

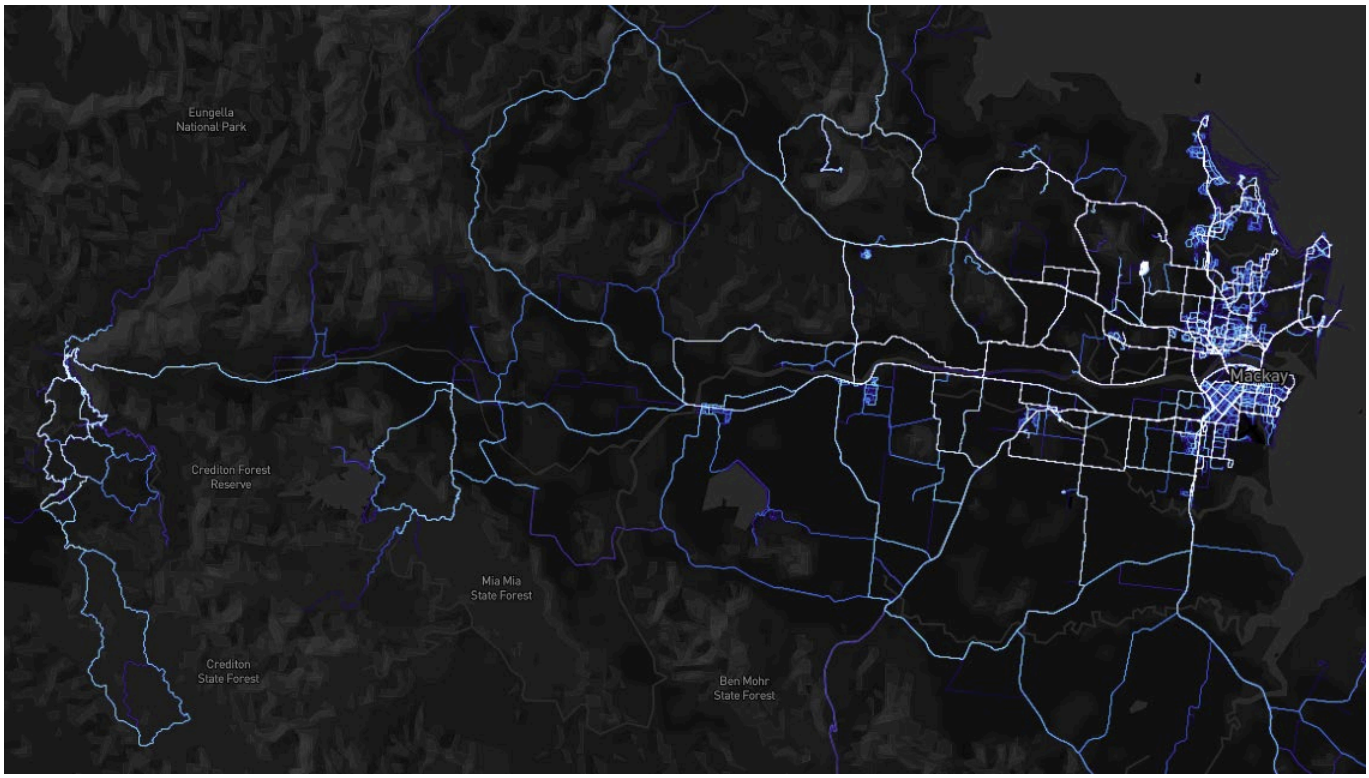


Figure 6. Strava Heatmap for Cycling in Mackay Region

14 https://www.mtba.org.au/development/schools/school-of-excellence/

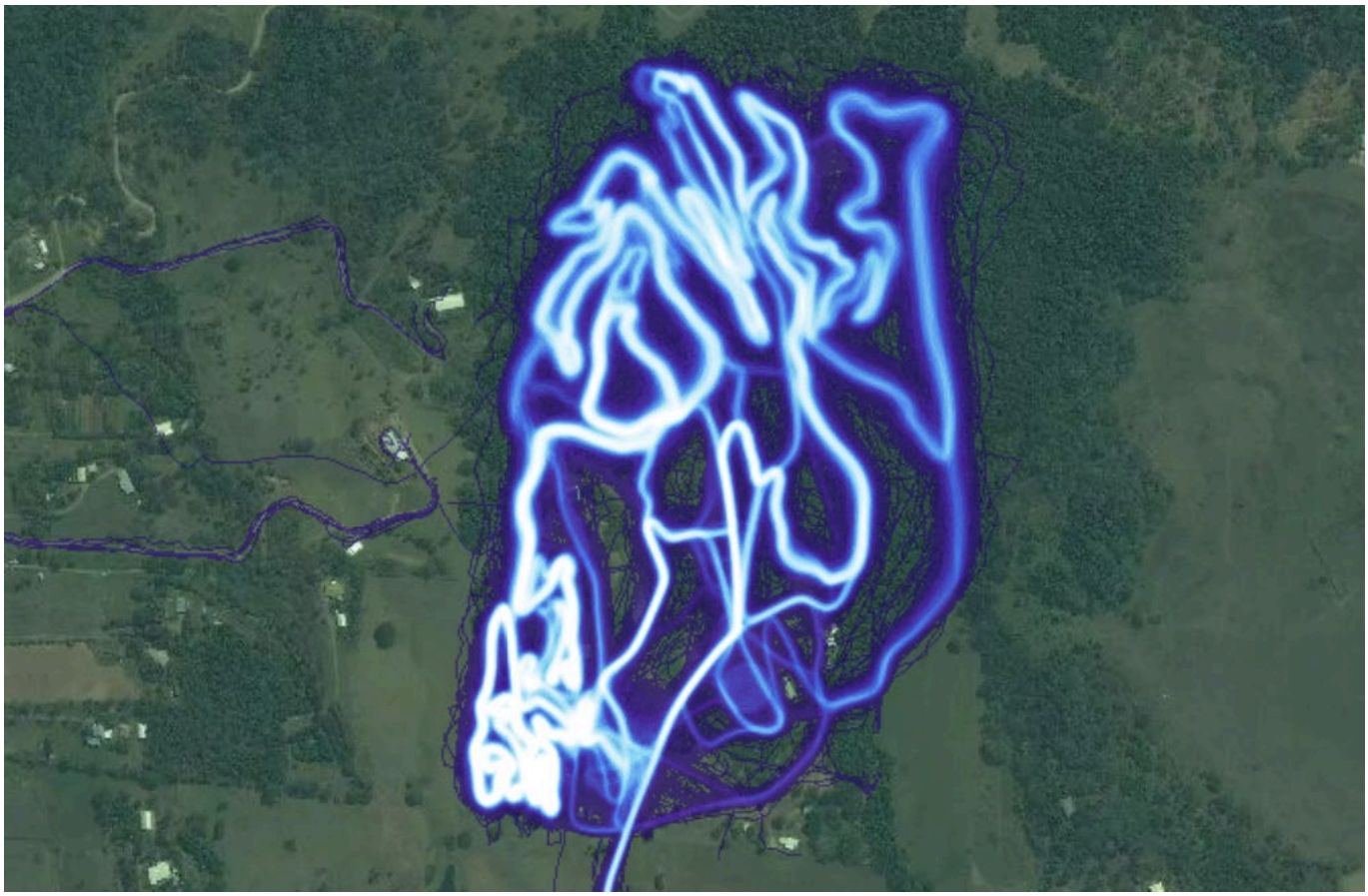


Figure 7. Strava Heatmap for Cycling in Rowallan Park

Note that the heatmaps shown above do not differentiate between road cycling and MTB. The only way to discern MTB trails from road cycling is by understanding the local terrain/roads. Where there is a cluster of activity shown in an area without roads, it is a reasonable assumption that it is being undertaken off road on MTBs.

The results of these investigations revealed that there is really only one venue with formalised, legal MTB trails in the region – Rowallan Park. Rowallan Park is discussed further on the following pages.

A second venue called Mt Kinchant has some old downhill MTB trails and has even hosted some downhill races in the past, but is currently not being used. MADMTBC is seeking to gain formal access to reopen these trails and is well advanced in these discussions with Queensland Parks and Wildlife Service (QPWS). However, as there are really no current legal trails in use there, Mt Kinchant is not discussed further in this section.

Throughout the broader region, there are likely to be some scattered informal trails (i.e. those trails designed and built by local riders without permission from the land manager), but no extensive trails or networks of this nature were discovered.

Finally, there are plenty of opportunities to ride on fire tracks, four-wheel drive tracks and management vehicle tracks in the many National Parks and other reserves throughout the region. However, these types of tracks don't provide the preferred experience MTB riders are seeking and are not covered in this report.

8.3 ROWALLAN PARK

8.3.1 LOCATION AND SITE CONTEXT

Rowallan Park is located at Glendaragh Rd, Farleigh, approximately 12km north-west or 15-20 minutes' drive from the centre of Mackay via the Bruce Highway.

Rowallan Park is operated by Scouts Australia and is primarily used for scouting activities and functions. The following information is taken from the park's website (www.rowallanpark.com):

> *"Rowallan Park is located 10 minutes north of Mackay and consists of 104 Acres (42 Hectares) of natural bushland. The natural bushland setting of Rowallan Park provides the ideal place for camping and outdoor activities.*
>
> *NOTE: Rowallan Park is a designated flora and fauna park and as such, NO pets are allowed.*
>
> *The park is also available for use by non-Scouting groups, organisations and schools.*
> *Rowallan Park"*

The site can be characterised as rolling hills, extending from about 50m above sea level up to 100m above sea level. It has a mostly southerly aspect. There are a series of ridges and gullies, including some minor waterways. It is mostly (estimate around 75% cover) vegetated with native vegetation, ranging from more open forests to denser rainforest in some sheltered gullies. The site is very rocky, with plenty of loose surface rock available for the construction of trail features, however this does also make it difficult to construct easier trails suitable for less skilled riders.

The extensive network of MTB trails on the site have been designed and built by the local MTB community and the local club (MADMTBC) over a period of years. The trails are well maintained and in good condition and are a testament to the dedication and hard work of the local club.

8.3.2 FACILITIES

The following facilities are available at Rowallan Park[15]:

Camping

There are grassed camping areas available, with fire places, close to showers and toilets. For those looking for a little more independence there are bush campsites available.

Activities

The following day activities are available:

- Nature walks
- Swimming
- Canoeing
- Guided tour and historical sites (by arrangement with the camp warden)

Facilities

The following facilities are available:

- Dormitory accommodation (bunk type bedding - up to 30 people total);
- 2 separate rooms with disability access (bunk type bedding - up to 4 people per room);
- Toilet and shower with disability access;
- Ablution block with female and male showers and toilets;
- Kitchen - complete with fridges, freezer, industrial gas stove, urns, cooking utensils and crockery;
- Dining area (seats max 30 people);
- Training room (seats max 20 people);
- Activities shed (seats 60 and has kitchen facilities);
- Parade ground with flag poles;
- Designated campfire area;
- Open air chapel with natural log seating (situated in quiet bush setting on the creek bank)."

In addition to the facilities listed above, are the following MTB facilities:

- Car parking for MTB riders;
- MADMTBC clubhouse;
- Bike racks;
- Bike wash;
- Fee collection point (a daily use fee of $3 per person per day applies to ride the trails. It operates on an honesty basis);
- Approximately 15km of cross-country MTB trails, including all relevant infrastructure such as bridges and signage (see next section).

15 Source: www.rowallanpark.com

8.3.3 TRACK FEATURES AND FACILITIES

Figure 8 below shows the layout of trails at Rowallan Park. The trails are colour coded for difficulty[16]: green = Easy, blue = More Difficult. In total there is approximately 15km of trails available (and plans to extend to 20km soon), all best classified as cross-country MTB trails.

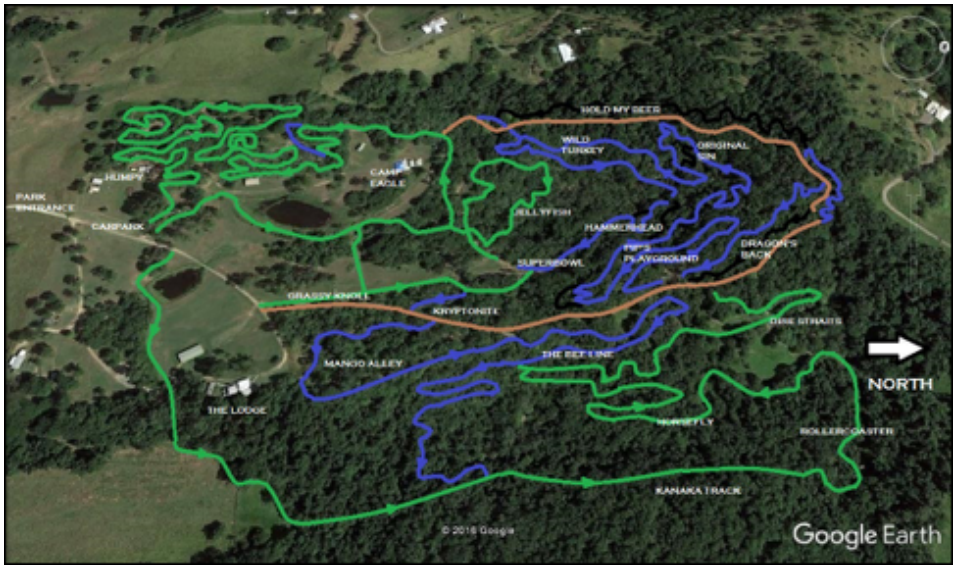


Figure 8: Map of trails at Rowallan Park (courtesy of MADMTBC)

The trails are rated as follows:

- 55% of trails are rated Easy (green circle);
- 45% of trails are rated More Difficult (blue square);
- 5% of trails are rated Very Difficult (black diamond).

In order to add variety and flexibility to the trail network, the trails use optional sections of increased difficulty referred to as ABC lines (see Appendix 1: Technical Information for full explanation). These sections provide options and variety within a trail, allowing riders of different skill levels to enjoy the same trail. Some of the A-lines provided on some trails are rated Very Difficult (black diamond).

MADMTBC has invested considerable time and resources to the development of the trails. There are numerous challenging Technical Trail Features (TTFs) to test riders, with the majority of these constructed using large rocks. In addition to these rock features there are a number of bridges/boardwalks and crossovers, constructed from concrete and timber.

The terrain is naturally very rocky and lends itself to more challenging and difficult trails. The construction of Easy trails is difficult in this environment, and while there are many trails shown on the map rated as Easy (that no doubt comply with the Easy IMBA trail difficulty rating), they are very rocky, edging close to a rating of More Difficult.

The site is limited for elevation – from top to bottom there is approximately 60m of vertical elevation available. Topography could be characterised as rolling hills, with slopes ranging from flat to moderately steep. The short, steep and punchy climbs are well suited to shorter cross-country style rides. The site is mostly densely vegetated with pockets of rainforest and has a pleasant, shady aesthetic.

MADMTBC undertake extensive maintenance on the trails, most typically during the drier months when the majority of the riding and racing occurs.

16 The International Mountain Bicycling Association (IMBA) has published Trail Difficulty Rating System (TDRS), which is widely used around the world to rate the difficulty of MTB trails. It is commonly used in Australia. The full rating system is provided in Appendix 1: Technical Information.

8.3.4 CURRENT USERS / TARGET MARKETS

The facilities and trails at Rowallan Park cater to predominantly cross-country MTB riders, with trails for all abilities (from beginner to advanced).

The trails are primarily used by members of MADMTBC. In fact, the club's Usage Agreement with Scouts Australia stipulates that the trails can only be used by riders who hold a Mountain Bike Australia (MTBA) membership – i.e. essentially members of MADMTBC or members of other MTBA-affiliated clubs. Given that MTBA membership provides insurance for riders, it is assumed that this stipulation has been included by Scouts Australia to protect the park and organisation from any liability associated with mountain biking.

As Rowallan Park is the only formalised MTB trail network in the entire Mackay region, there are no trails available for use by for novice or casual MTB riders who don't hold an MTBA membership[17]. This is likely to create a significant barrier to entry into the sport locally but could also be a factor potentially driving membership of the club.

While the trails and facilities at Rowallan Park are well maintained and in good condition, the small size of the trail network, the difficult nature of the trails, the narrow range of experiences offered (i.e. cross-country only) and the requirement for all users to hold a MTBA licence, together limit its ability to attract visitation from outside the local region.

The exception to this is racing – significant races like State Championships are considerable drawcards and it is understood that the venue is well received and supported by the broader Queensland MTB racing community.

8.3.5 GOVERNANCE

Rowallan Park is 41.7ha in size and is freehold land, owned and managed by Scouts Australia.

MTB activities only occur within the park with the approval of Scouts Australia. While MTB is thought to be a good fit with the culture and activities of Scouts Australia, it is clearly not their primary focus. As such, from time to time, the trails are closed or unavailable to riders when Scouts Australia events or activities are underway.

MADMTBC pays a significant fee to access the park. These fees are not put back into the development of the MTB trails specifically but are presumably used in the ongoing maintenance and management of the larger park and general facilities.

MADMTBC has a Usage Agreement in place with Scouts Australia which dictates the terms of use for the club. It is not known how long or how secure this agreement is. If Scouts Australia were to end this agreement, MADMTBC and the broader MTB community would be left with no formal riding venues within the region.

8.3.6 LAND AVAILABILITY AND KEY CONSTRAINTS (LAND TENURE, ENVIRONMENTAL, PHYSICAL)

Rowallan Park has little scope for growth or expansion. The majority of the site has already been developed for trails, with only a few pockets of land left to increase the trail network. Surrounding land tenures are all privately owned freehold land which are unlikely to support expansion.

The park also has some significant historical and environmental values, which restrict the placement and extent of trails within the park. Furthermore, the other functions of the park (i.e. Scouts Australia jamborees, camps etc.) remain the main consideration and use of the park, further restricting where trails can be constructed.

The park's distance from Mackay is also a factor restricting its use. While Strava heatmaps show that it is reasonably common for riders to ride to the park, vehicles are definitely the most common means of accessing the park.

For non-local riders, the entry to the park could be improved. Access is via a long dirt road, which feels like a private driveway. The addition of some signage on the Bruce Highway and Glendaragh Rd would assist in finding the venue, while signage along the access road would provide reassurance to visitors that they are indeed on the correct road. Car parking could be formalised and improved, with some signage at the arrival providing a sense of arrival and direction towards the MTB trails.

17 It is estimated that less than 25% of the MTB community holds an MTBA licence. Many MTB riders have no interest in racing and see little value in joining a MTB club (despite the many benefits that club membership provides like insurance, socialising and so on).

8.3.7 PHOTOS



Figure 9. Typical trail at Rowallan Park



Figure 10. Constructed TTF at Rowallan Park



Figure 11. Typical bridge and rocky environment at Rowallan Park



Figure 12. Easy trail at Rowallan Park



Figure 13. Bridge/crossover at Rowallan Park



Figure 14. Bridge/crossover at Rowallan Park



Figure 15. Clubhouse facilities at Rowallan Park



Figure 16. Clubhouse facilities at Rowallan Park

9 GAP ANALYSIS



Understanding the gaps in the MTB offering in the Mackay region will assist to understand where future potential may lie. This section explores the gaps in the Mackay MTB market according to disciplines, market segments and facility hierarchy.

9.1 MTB DISCIPLINES

Table 6 below provides a gap analysis of the MTB opportunities currently available in the Mackay region. It lists the various different disciplines within MTB and indicates whether any trails for that discipline are available within the region, broken down by trail difficulty (Easy, More Difficult, Very Difficult). It shows that cross-country is the only discipline that is catered for by the current trail offering in the region, with some trails available at all difficulty levels (although it is noted that there are minimal 'Easy' trails).

Table 6: Gap Analysis by MTB Discipline

Discipline	Trail Difficulty Rating		
	Easy (Suitable for Novice Riders)	More Difficult (Suitable for Intermediate Riders)	Very Difficult (Suitable for Advanced Riders Only)
Cross-country	✓ Rowallan Park[18]	✓ Rowallan Park	✓ Rowallan Park
Downhill	✗	✗	✗
Gravity enduro	✗	✗	✗
Trail/freeride	✗	✗	✗
Pump track riding	✗	✗	✗
Dirt jumps	✗	✗	✗

18 Only a small number of Easy trails available.

9.2 MARKET SEGMENTS

Looking at the market segments discussed in Table 2, another way of undertaking a gap analysis is to consider what trails are available for those three different market segments – see Table 6. The results are much the same – Rowallan Park is the only real trail network available, offering only cross-country trails, with limited Easy trails available that are suitable for the Family/Leisure market.

Table 7: Gap Analysis by Market Segment

Discipline	Market Segment		
	Family/Leisure	Core	Hard Core
Cross-country	✓ Rowallan Park	✓ Rowallan Park	✓ Rowallan Park
Downhill	✗	✗	✗
Gravity enduro	✗	✗	✗
Trail/freeride	✗	✗	✗
Pump track riding	✗	✗	✗
Dirt jumps	✗	✗	✗

9.3 HIERARCHY

A review of the notional service hierarchy or significance of the existing supply helps to highlight which level of facility is missing from the supply.

Venue	Hierarchy				
	Local	Regional	State	National	International
Rowallan Park	✗	✓	✓	✗	✗
Mount Kinchant	✗	✓	✓	✗	✗

9.4 GAP ANALYSIS SUMMARY

A review of all these different methods of assessing gaps in the Mackay region MTB market reveals the following key gaps:

- **Informal access** – there is no access to dedicated MTB trails for informal riders who aren't part of a club. Currently, MTB riding is permitted on the fire trails in Crediton and Cathu State Forests and Eungella National Park, however, there aren't any purpose-built MTB trails open to the general public.

  This finding stands against major trends in sport and recreation participation for informal-based opportunities.
- **Localised opportunities** – there are no localised MTB opportunities positioned in population centres.
- **National/International standard** – currently, there are no national or international standard facilities which could cater for this level of event. Attracting tourists to the region for MTB is likely to require this standard of facility.
- **Limited discipline offering** – Cross-country is the only MTB discipline formally offered in the region. Downhill, gravity enduro, trail/freeride, all mountain, pump track riding, dirt jumps disciplines are available on publicly accessible, sanctioned sites.

10 OPPORTUNITY ANALYSIS



Four key opportunities have been identified for MTB trail development in the Mackay region. These are listed in Figure 17 below.

PRIORITY 1

EUNGELLA-FINCH HATTON

Style/Type of Trails: All
Significance: National/ International

PRIORITY 2

MT KINCHANT REGIONAL PARK

Style/Type of Trails: Downhill, gravity enduro, trail/freeride
Significance: Regional/ State

PRIORITY 3

ROWALLAN PARK

Style/Type of Trails: Cross-country
Significance: Regional/ State

PRIORITY 4

MACKAY URBAN MTB

Style/Type of Trails: Pump tracks, dirt jumps
Significance: Local

Figure 17: Opportunities Identified in Mackay Region[19]

19 MTBA's Queensland Mountain Bike Strategy recognises three levels of MTB site significance: National, regional and local. Nationally significant sites can capture an international market, and regional sites can also capture a state market.

These opportunities are shown in Figure 18 and discussed further in the following sections.



Figure 18: Location of Opportunities for MTB Trails

The broader Mackay region has an abundance of public land tenures, including national parks and state forests and an abundance of mountainous and forested areas that offer many attractive qualities for mountain biking. However, these variables need to be balanced with the more practical attributes of proximity, tourism services and facilities and so on. There were many other locations considered and investigated, but eventually ruled out of contention for a range of reasons, such as distance from Mackay, remoteness, lack of nearby facilities, lack of vertical elevation, land tenure etc.

Specifically, some sites/locations were suggested by stakeholders during the consultation phase. These included:

- **Cathu State Forest – 70-80km to the northeast of Mackay along the Bruce Highway.**
  This site was visited during fieldwork and appears to offer good natural attributes for MTB trail development, including outstanding vertical elevation. However, its distance from Mackay and lack of facilities and services was a significant disadvantage to the site. There is no nearby town of any size or significance that could serve as a base from which to visit the site and that could provide the building blocks for a MTB tourism destination.
- **Mt Bassett – Mt Bassett is a small hill around 3.5km to the northeast from the Mackay CBD.**
  This site was visited during fieldwork, however, is not supported as a site of potential MTB trail development, even for a small-scale facility in an urban setting. The site is small and is located within a very industrialised setting with the main summit area of the hill taken up by an active quarry. Furthermore, it is constrained on the south side by a cemetery. It offers limited value for MTB trail development.

10.1 EUNGELLA-FINCH HATTON

Table 8: Summary of Finch Hatton/ Eungella MTB opportunity

Summary of Finch Hatton/ Eungella opportunity	
Location	Area surrounding the town of Finch Hatton, approx. 70km west of Mackay. Site extends west to Eungella, up into mountains to the north and south to Teemburra Dam.
Style/type of trails	All styles/types of trails
Extent of trails	100km+ This would most likely be comprised of stacked loop trails located close to Finch Hatton and point-to-point wilderness descending trails, starting up in the mountains around Eungella and Broken River and finishing down in the valley near Finch Hatton. Easier and flatter trails would be located on the valley floor, potentially linking to Finch Hatton Gorge for swimming opportunities.
Potential significance	National/ International
Summary	« Potential to become a major new MTB destination in Australia. « Approximately 1-hour drive from Mackay Airport. « Spectacular scenery. « Topography and setting lends itself to all styles/ types and difficulty ratings of trails. As a proposed new development, a key objective would be to ensure that all rider demographics are catered for. « With one road through the valley from Finch Hatton up to Eungella, it is perfectly set up for a MTB shuttle operation running scheduled runs up and down the range.
Complementary opportunities (i.E. adventure, multi-sport, trail running, kayaking etc.)	« Site-seeing. « Bushwalking. « Trail running. « Hang-gliding and para-gliding at Eungella. « Kayaking / canoeing and fishing at nearby Teemburra Dam which could be linked via trails. « Fishing – Teemburra, Kinchant and Eungella are stocked with barramundi.
Existing infrastructure including tourism services/ businesses	« Finch Hatton: • Small town with basic infrastructure. • Pub, General Store and few other basic shops. • Showgrounds could be used as an event staging area. • Camping currently offered at the Showgrounds. • School. • Walking tracks at Finch Hatton Gorge. • Accommodation clustered around the town and Finch Hatton Gorge. • Opportunities for adaptive use of State Heritage Listed Finch Hatton Railways Station. « Eungella: • Small town with established tourism infrastructure including some food and hospitality businesses. • Lots of bushwalking trails and site seeing opportunities.
Cost considerations	« Dense vegetation, steep side slopes and wet climate will add to trail construction costs. « Road infrastructure is reasonably good – all sealed roads running through the valley and up to Eungella. However, the main road up to Eungella is very narrow and steep and is potentially unsuitable for large volumes of traffic. « While detailed investigations haven't been undertaken, soils appear reasonably good and not excessively rocky. « Possible costs associated with securing trailhead site and access corridor into the town centre from public land tenures to the south above town. « No suitable access roads to high elevation shuttle drop-off points have been identified. Upgrades to existing roads or construction of new roads could have a significant cost if required.

Summary of Finch Hatton/ Eungella opportunity	
Land tenure and topography	« Finch Hatton sits in a valley at about 100m above sea level. « Valley runs east/ west with large mountain ranges to the south, west and north. Cattle Creek runs through the base of the valley. « At the head of the valley to the west the road climbs steeply up to Eungella, perched on the edge of the escarpment. « Eungella is at about 680m above sea leve. « Some mountain peaks are over 1000m above sea level. « Edge of the escarpment is generally around 600-700m above sea level. « Numerous creeks, rivers and waterfalls in the region, including spectacular Finch Hatton Gorge. « Range of different public land tenures available for trail development, all around the rim of the escarpment and down towards Finch Hatton. These include: National Park, Forest Reserve, State land and lease hold land. « Public land appears to extend to within about 700-800m of the main street on the southern side of Finch Hatton. Further investigation will be required to determine the best location of the trailhead, ideally within the centre of the town.



Figure 19. Finch Hatton Creek below Finch Hatton Gorge



Figure 20. Pub in main street of Finch Hatton



Figure 21. Main street of Finch Hatton looking east



Figure 22. Finch Hatton showgrounds



Figure 23. Walking track near Eungella



Figure 24. Teemburra Dam



Figure 25. Cattle Creek near Netherdale



Figure 26. View from the escarpment over Finch Hatton

10.2 MT KINCHANT REGIONAL PARK

Table 9: Summary of Mt Kinchant Regional Park opportunity

Summary of Mt Kinchant Regional Park Opportunity	
Location	Approx. 12km south of Mirani Approx. 36km west-southwest of Mackay
Style/type of trails	Downhill, gravity enduro, trail/freeride
Extent of trails	10-20km
Potential significance	Regional significance
Summary	« MADMTBC is currently negotiating with QLD QPWS around access and trail development at Mt Kinchant. « Potential to become a regional level MTB destination in Australia. « Approx. 0.5-hour drive from Mackay Airport. « Topography and setting lends itself to a focus on gravity style trails. « Mt Kinchant could potentially fulfil local demand for gravity trails within a short timeframe. Informal MTB singletracks exist on the mountain currently, which could be reopened fairly quickly with approval from QPWS. « Downhill track about 1.3km long has been in existence for about 20 years. « While Mt Kinchant previously had up to 30km of XC trails ranging across the lower areas of the Mt Kinchant Regional Park and the neighboring Kinchant Waters Resort, the re-development of these XC trails isn't seen as a priority moving forward – this discipline is already serviced by Rowallan Park and will be further serviced by Eungella-Finch Hatton. « Mt Kinchant has held various MTB competitions over the last twenty years from local club events to the Queensland State Titles in 1998.
Complementary opportunities (i.E. adventure, multi-sport, trail running, kayaking etc.)	« With Kinchant Dam directly adjacent, complementary activities largely revolve around water activities – in particular, fishing, boating, kayaking, canoeing etc. « Kinchant Dam is well known for its fishing. « Adventure racing.
Existing infrastructure including tourism services/ businesses	« Kinchant Waters caravan park is located adjacent to the mountain at Kinchant Dam could provide accommodation for riders travelling to Mt Kinchant. « Existing visitor facilities at Kinchant Dam (i.e. car parking, toilets, picnic facilities etc.) could potentially be leveraged for the development of the MTB trails, depending on the proposed layout of the trail network.
Cost considerations	« Dense rainforest vegetation on upper parts of mountain may add to construction costs. « DH trails still exist on site, but will require significant remediation works to bring them up to a useable standard. « Access road to the top of the DH trails still exists on site, but it is likely to require significant remediation works to bring it up to a useable standard. « Furthermore, access road passes through private properties. Securing approval to use the road may/may not be possible. Realignment could be costly.
Land tenure and topography	« Mt Kinchant Regional Park is approx. 181ha, running east to west over the spine of Mt Kinchant. « Main area of interest is the western area of the park bordered by Kinchant Dam and the private property of Kinchant Waters Resort. « Highest elevation is about 270m. Lowest elevation is about 55m. Elevation drop of about 215m. Note that the proper summit of Mt Kinchant is higher (about 400m), but the club is not proposing to access this area.

10.3 ROWALLAN PARK

Table 10: Summary of Rowallan Park opportunity

Summary of Rowallan Park Opportunity	
Location	Approx. 12km northwest of Mackay
Style/type of trails	Cross-country
Extent of trails	15km Not much scope to increase beyond the current 15km trail network.
Potential significance	Regional significance
Summary	« Already a MTB destination of Local to Regional significance. « Approximately 10-20 minutes' drive from Mackay CBD. « 15km of XC trails. « Trails for all abilities, but very few Easy (green circle) trails. « Limited space available for further trail development on site. « Trails not available for non-MTBA members under current Usage Agreement. « With some further investment and upgrades to the trails and facilities and resolution of the issue regarding access for non-MTBA members, the park could potentially achieve greater visitation and Regional significance.
Complementary opportunities (i.E. adventure, multi-sport, trail running, kayaking etc.)	Rowallan Park is operated by Scouts Australia. The primary uses associated with the park relate to scouting activities.
Existing infrastructure including tourism services/ businesses	Existing infrastructure for use by MTB riders includes the trails, car parking, signage, club rooms, bike wash etc.
Cost considerations	The continued operation of the park in its current form requires no funding beyond the funding currently being invested by MADMTBC (which includes daily rider fees, annual fees paid by the club and any grant funding secured by the club for trail upgrades). In order to move beyond the status quo, additional funding may be required to resolve the issue regarding access for non-MTBA members and to upgrade signage, car parking and other facilities.
Land tenure and topography	Rowallan Park is freehold land, 42ha in size and mostly bushland. It is a designated flora and fauna park. Topography is characterised as rolling hills, with slopes ranging from flat to moderately steep. The site has only 60m of vertical elevation available. The site is densely vegetated with pockets of rainforest. Terrain is very rocky.

10.4 MACKAY URBAN MTB

Table 11: Summary of Mackay Urban MTB opportunity

Summary of Mackay Urban MTB Opportunity	
Location	Mackay urban (possibly old dump site off Petrie Street. East Mackay)
Style/type of trails	Urban – pump track, dirt jumps, skills trails etc.
Extent of trails	Only a small site is required for this style of trails – around 0.5 - 2ha.
Potential significance	Local to Regional significance
Summary	« Identify a suitable site within the Mackay metro area. « Ideally, could be co-located with other sporting/recreational facilities to minimise requirement for infrastructure items like car parking, toilets etc. « Co-location with skate parks can be very successful. « Provides a local opportunity for MTB growth and skills progression, particularly at youth level, where participants may not have access to transport to travel out to Rowallan Park or other proposed destinations.
Complementary opportunities (i.E. adventure, multi-sport, trail running, kayaking etc.)	As above, suggest co-location with other sporting/recreational facilities. Depending on the nature of the trails/facility, could also be used for school bike programs, skills clinics, etc.
Existing infrastructure including tourism services/ businesses	Not known – ideally, a site could be identified within Mackay metro area that already has existing sporting/recreational facilities.
Cost considerations	Urban bike parks can be designed and constructed to meet a range of budgets from small (less than $100K) to large (up to $1M). Co-location with existing sporting/recreational facilities reduces the cost of supporting infrastructure – i.e. car parks, toilets etc.
Land tenure and topography	Best suited to flat sites with minimal native vegetation (large shade trees can be retained). Site should be council owned/managed land. Minimum size requirement around 0.5ha.

During research for this study, Council staff have suggested a former tip site on Petrie St, East Mackay as a potential urban MTB destination. Although a detailed site analysis and trails master planning would be required to determine the suitability site, the following points are offered:

« The site is a fair distance from the Mackay CBD, probably considered too far for the central location such a facility calls for.
« However, the site has nearby adjacent recreation uses which can offer synergies.
« Former landfill sites can be ok, however, suitability depends on the process of decommissioning. If the site is decommissioned properly then it may be suitably stable. If not, there can be contaminants on site and soil can be unstable.
« If the site is suitably flat, stable and properly compacted subgrade, it may be possible to construct an asphalt pump track, largely done by building up not digging down, would be proposed.

10.5 OPPORTUNITY SUMMARY

The opportunities outlined suggest a potential offering of local, regional/ state, national/ international significance. Mount Kinchant, Rowallan Park and a Mackay Urban venue would all serve a predominantly local market, with Mount Kinchant and Rowallan Park also potential contenders for future regional and state-level events.

It is crucial to understand the point of difference in the region's market which will promote its status against other MTB destinations. This is the outstanding opportunity the Eungella-Finch Hatton destination offers.

The natural potential of Eungella-Finch Hatton trail network is enormous with potential approaching that of Blue Derby Mountain Bike Trails in Tasmania.

The Eungella-Finch Hatton opportunity is critical to the development of an MTB tourism market in the Mackay Region and it is the unique point of difference that has the potential to elevate the region's MTB market into the national/ international sphere.

In order to understand how this opportunity aligns with the best practice principles essential for successful mountain bike destinations as identified in Section 6 of this report, we have provided some key comments on the Mackay Region in the context of these principles in the Table 12 below. Particular emphasis is placed on the Eungella-Finch Hatton opportunity due it's critical role in the market and the national/international scale of opportunity it presents.

Table 12: Review of the Mackay MTB market against identified best practice principles

Variable	Mackay Market Commentary
Quality of the trail network	« As a new development, the opportunity exists to ensure the Eungella trail network developed meets key quality criteria such as drainage, signage, difficulty and landscaping. « The scenery in the Eungella-Finch Hatton area is without doubt spectacular. The topography and settings enable provision for all types of styles and difficulty ratings. Trail planning and construction would need to ensure the trails reach each of the key landmarks and features of the landscape.
Extent of the trail network	« The Eungella-Finch Hatton opportunity alone offers potential 100+ km of trail network, well above the 30-50km tipping point to retain riders for more than one day's riding.
Variety offered by the trail network	« The Eungella-Finch Hatton opportunity has the potential to offer all styles/types and difficulty ratings of trails. « As a new development, appropriate trail planning and development can ensure the trail network developed provides the variety necessary.
Location of the trail network	« Eungella is approximately 1hr 20 mins by road from Mackay, within the 1-3 hour range provided in the best practice principles. « In addition, Mackay has a major regional airport with direct flight services to Brisbane, Townsville, Gold Coast, Melbourne and Sydney. « In addition, the Whitsunday Coast Airport, located approximately 1 hour 50 minutes' drive from Eungella is undergoing an expansion which would seek to attract international long-haul flights. [20] [21]

20 https://www.dailymercury.com.au/news/15m-airport-expansion-plan-to-attract-internationa/3360943/

21 https://www.whitsunday.qld.gov.au/DocumentCenter/View/887

Variable	Mackay Market Commentary
Marketing of the trail network	« The region has key stakeholders in Mackay Tourism and Council's Economic Development unit to assist in the development of a marketing strategy for the MTB market which should seek to attract core, non-core and new riders for MTB tourism purposes. « Within the Mackay Destination Tourism Plan: « The vision for the region as a destination includes the desire to be "an outdoor activities hub of Queensland…", demonstrating that there is already support to promote the outdoor opportunities of the region. « A 'Eungella and Pioneer Valley Tourism Node' is highlighted as one of 7 catalyst projects to generate a range of other investment, marketing and product development opportunities. The Eungella-Finch Hatton mountain biking opportunity would support this effort. « Another of the catalyst projects highlighted is a focus on Mackay Tourism Events, including sports events, in the region. Again, the Eungella-Finch Hatton opportunity would support this effort. « There are limited commercial interests which would assist, but as the opportunities are explored and implemented, commercial operations are likely to emerge.
Supporting services and infrastructure	« Eungella is a small town with established tourism infrastructure including a visitor information centre, some food and hospitality businesses with three hotel/motel accommodation options, a number of Air BnB listings and five camping locations. « Finch Hatton is a small town with basic infrastructure – pub, general store and few other basic shops. The Finch Hatton Showgrounds could be used as an event staging area. A small number of cabin, motel and camping accommodation options in/around Finch Hatton. « Bus tour services from Mackay to Finch Hatton/ Eungella are available. « Mackay has a full-range of tourist offerings. « Commercial MTB services don't currently exist.
Provision of information about the trail network	« No information currently exists. As a new development, the opportunity exists to ensure comprehensive trail mapping and information distribution about the Eungella-Finch Hatton trail network occurs.
MTB events	« No specific major signature MTB only events currently, but as a new development, the opportunity exists to incorporate event planning and bidding into the activation plan for the new network. « The MAD Rush 6-hour event has previously been held and could be re-established. « Potential to build on the ZACH MACH adventure race, Mackay Marathon and add expanded MTB race events to profile region. « Potential event staging location at the Finch Hatton Showgrounds.
Availability of non-MTB tourism product	« The Eungella-Finch Hatton area is already a tourism destination with a strong eco-tourism focus. The broader Mackay region has a strong and developing tourism product which includes access to the Great Barrier Reef.
Maintenance and ongoing investment in the trail network	« As a new development, maintenance arrangements have not been established, but the opportunity exists to incorporate these requirements into planning and negotiations. « It would be anticipated that maintenance and ongoing investment would require a partnership approach with investment from local and state government as a minimum. « QPWS have indicated they may have a trail investment and maintenance role for significant trail networks. « Potential to support local business development in private trail development and maintenance.

The Queensland MTB Strategy identifies a number of gaps in the Queensland MTB market. In order to position the Mackay region well, it is important to identify if the opportunities the region offers can fill these identified state-wide gaps.

Table 13: Response to gaps identified in the Queensland MTB Strategy

Identified Gap	How the Mackay region's opportunities respond to these gaps
Lack of trails, facilities and infrastructure that cater to the needs of all abilities: « Lack of accessible trail information. « Undersupply of introductory trail experiences to cater for beginners and build skills and confidence. « Undersupply of black and double black classification trails that cater to the needs of riders of advanced abilities. « Lack of all mountain and gravity style trails.	« The Eungella-Finch Hatton opportunity has the topography and land which would support the development of the easiest level trails, in addition to stunning natural attributes which would encourage participation. Furthermore, this would be complemented with the development of a Mackay-based skills park, providing a localised venue for skill development of local riders. « The Eungella-Finch Hatton opportunity has the topography which would support the development of the most challenging of trails to challenge advanced riders. « The Eungella-Finch Hatton opportunity also has the potential to deliver all mountain and gravity style trails.
Lack of tourism product: « Lack of single track trail networks that will draw visitation from intrastate, interstate and overseas. « Lack of locations that could attract national and international MTB events. « Lack of visitor information and services.	« The Eungella-Finch Hatton opportunity has enormous potential as a tourism product which could draw visitors from across the state, country and world. « The development of high quality trails in accordance with IMBA standards and which take advantage of the stunning natural landscape in the Eungella-Finch Hatton area will present an excellent opportunity to attract national and international events. « Existing visitor information services at Black River and in Mackay, and existing tourist services in the Pioneer Valley/ Eungella and Mackay, could be expanded to deliver improved services to MTB tourists.



10.5.1 TRAIL MODELS

Assessment against the Trail Models defined in the Queensland Mountain Bike Strategy suggests that Mt Kinchant and Rowallan Park both align with the 'Trail Network' model. A Trail Network (see Figure 27) is defined as:

"a single site with multiple signed and mapped trails of varying type and classification, with no visitor centre and limited mountain bike facilities."

A **Trail Network** can be standalone or form part of a trail centre of trail town but are often located away from population centres.

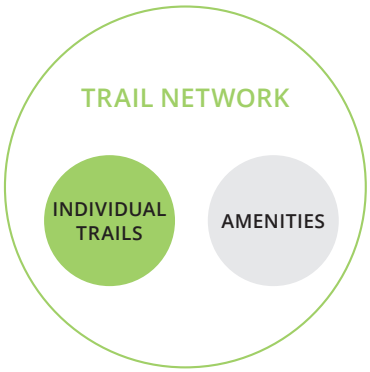


Figure 27: Trail Network Model[22]

The Eungella-Finch Hatton destination is considered a high-quality opportunity of National/International significance. Assessment against the Trail Models defined with the Queensland Mountain Bike Strategy suggests the opportunity offers greater alignment as a Trail Centre (see Figure 28). The Eungella-Finch Hatton destination would have a network of trails, amenities and facilities which support existing tourism, including Broken River Visitor Information Centre located just outside of Eungella. Although the area doesn't have a bike hire and repair shop, the General Store may be able to serve this function, or a new bike hire and repair business could be supported to establish in the area.

A **Trail Centre** is defined as:

"a single site with dedicated visitor services and mountain bike facilities, provided by a single trail provider. It includes multiple signed and mapped trails of varying type and classification. A trail centre can be part of a trail town and incorporates a trail network. They are typically located close to major population centres or iconic locations."

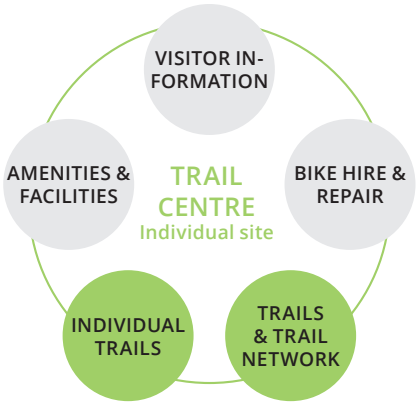


Figure 28: Trail Centre Model[22]

However, given the significance of the Eungella opportunity, it is proposed that there is outstanding potential in identifying Eungella-Finch Hatton as a future Trail Town. A **Trail Town** is defined as:

"a population centre or popular recreation destination that offers a wide range of high quality trails as well as related services, facilities, businesses, strong branding and supportive governance."

A trail town can incorporate trail centres, typically has multiple trail networks, and may consist of a number of sites. It would need:

- Car parking
- Visitor services
- High quality directional signage and maps
- At least one cohesive trail network offering multiple classifications and trail types within a single uninterrupted area.



Figure 29: Trail Town Model[22]

A Trail Town can incorporate trail centres and typically has multiple trail networks. A trail town may consist of a number of sites, hosting several signed and mapped trails of varying type and classification. A Queensland example of a trail town is Atherton in Far North Queensland. The Eungella-Finch Hatton area already has some tourism facilities and services and has a range of complementary recreational and tourist attractions. Although little of that infrastructure which is required is currently in place, detailed planning and implementation to ensure the appropriate infrastructure and services are provided will put Eungella-Finch Hatton in an excellent position as a leading Australian mountain biking destination.

22 Queensland Mountain Bike Strategy 2018, MTBA.

10.5.2 KEY CONSIDERATIONS

There are some key issues which should be discussed in order to understand the context and deliverability of the Eungella-Finch Hatton opportunity.

Growing Market Interest

Firstly, numerous Councils across Australia are vying for a slice of the MTB market and to indeed secure a place as the next big MTB destination. As discussed in Section 4.2.7, multiple projects have recently been completed or are currently in progress across six states. Given this strong level of interest, it's important to consider whether there is a chance of market saturation which would impact on the viability of the Eungella-Finch Hatton opportunity.

Interstate, in our study team's view, there is a possibility of market saturation with key concerns in Victoria and Tasmania. In Victoria, there have been multiple projects of a similar scale and target market which may impact on the viability of some projects. Notably, these key projects don't offer the elevation that Eungella-Finch Hatton offers and are therefore not comparable in terms of scale. Tasmania is also experiencing a surge in trail projects with similar focus, which may weaken the impact and success of projects.

In Queensland, a key project is the Wangetti Trail in Far North Queensland, a new iconic multi-day wilderness experience. The multi-day nature of this trail means that this project has a different purpose and market to the Eungella-Finch Hatton opportunity. A series of trails are being developed and/ or expanded in Southeast Queensland, however none are considered to be comparable in scale of opportunity to Eungella-Finch Hatton.

Hidden Vale Adventure Park (near Ipswich) is planned for expansion to 300km+ of trails and is a unique offering in the Australian market. However, the key focus of this network is largely cross-country riding and therefore it doesn't deliver the all-discipline opportunity that Eungella-Finch Hatton would present. Furthermore, this site lacks the stunning scenery that is on offer at Eungella-Finch Hatton. There are also opportunities in the South-West region to build trails in stunning natural landscapes, but opportunities are perhaps less well defined and understood.

The Eungella-Finch Hatton opportunity is a standout project in terms of its scale and characteristics. Located adjacent to small towns and in close proximity to a major regional city with an airport, it has great potential for development as a trail town. Furthermore, it offers a tropical destination that is distinct from offerings in southern states. Market saturation is not considered a concern in Queensland and any degree of potential market saturation in southern states would not be expected to impact on the value of the Eungella-Finch Hatton opportunity given its characteristics.

While prompt action to capitalise on the growing market and market interest is recommended, it should also be noted that expanding the diversity and range of MTB destinations in Queensland can be good for all locations as it creates increased appeal to inbound and interstate tourists who can plan multiple destination adventures as well as plan for return visits.

Competitive Event Market

The competitive nature of the MTB event market is also noteworthy. Although high-level events are considered a terrific way to strengthen a market and gain economic benefit, many destinations are competing to win them.

MTBA manage an Expression of Interest (EOI) process where interested regions are required to submit an application to host National Cup events (see Figure 30 for event levels).



Figure 30: MTBA event levels [23]

23 https://www.mtba.org.au/wp-content/uploads/2019-MTBA-National-Cup-Host-Organisers-Guide-V1.1.pdf

MTBA have released a National Cup Host Organisers Guide which details the requirements for hosting and applying for events, available for download from a 'host an event' portal[24].

Initial investigations suggest Finch Hatton Showgrounds would be a suitable location for event staging. Any further investigation of the Eungella-Finch Hatton opportunity would need to include detailed analysis and dissection of the requirements for staging events and ensuring that these are captured in planning and design, and furthermore, that these are considered in economic and delivery analyses. Partnering with MTBA and ensuring trail and event planning aligns with the best practice principles outlined in this report will place Mackay in an excellent position to win high-level events.

Response to needs and gaps

The opportunities on offer for the region respond well to key needs and gaps highlighted in the planning and governance impact review, summarised by the following points:

- Responds to the tourism goals for the region including focusing on natural assets and building adventure activities.
- Activating Pioneer Valley and Eungella as a tourism growth area.
- Current lack of trails, facilities and infrastructure for all-abilities and lack of tourism product in Queensland, which would draw visitors from intrastate, interstate and international.
- Contributes to economic development goals through diversification and building tourism product. Of note, the changes in the economy drivers of the region have similar parallels with the inception of the Blue Derby MTB Park.
- Contributes to an active and healthy region.

10.5.3 OPPORTUNITY CONCLUSION

The Mackay region has tremendous potential to develop a mountain biking tourism market underpinned by a unique and nationally/internationally significant Trail Town offering. The opportunities on offer respond well to key needs and gaps identified for Queensland and Australian MTB market as well as key tourism and economic development directions for the Mackay region.

The Eungella-Finch Hatton Trail Town opportunity is critical to the viability of the region's mountain biking market and is considered to be of high value to the future Australian MTB market. The key advantages of the Eungella-Finch Hatton opportunity include the stunning natural environment, excellent elevation, substantial land availability, ability to provide for all MTB disciplines and levels, diversity of complementary activities, proximity to a major regional city, and direct alignment with the region's key tourism and economic development goals, which means an outstanding likelihood of broadscale support for the project.

Rowallan Park, Mount Kinchant and an Urban MTB Park will remain key elements of the market, playing an important role in strengthening the local market through proximal participation and local ownership, and continuing to draw participants for regional and state-level events. These sites would play a critical support role for the Eungella-Finch Hatton opportunity.

Figure 31 provides a visual demonstration of how the key sites intersect to provide an overall mountain biking market.

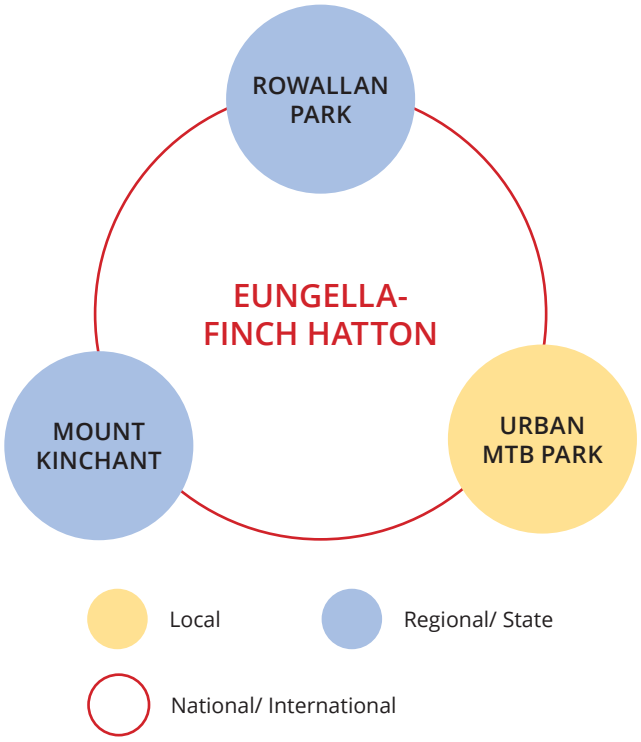


Figure 31: Mackay MTB market - key sites

24 https://www.mtba.org.au/nationalcup/host-an-event/

11 ECONOMIC BENEFITS ANALYSIS



There are a range of benefits that can be generated from developing mountain biking in the Mackay region, including economic, environmental and social benefits. For the scope of this study, economic benefits are to be considered. This section provides a high-level analysis of the potential economic benefits to the Mackay region that may result from development of the region's MTB market.

11.1 LOCAL MOUNTAIN BIKING

According to QSERSA data detailed in Section 4.1.2, Queensland's northern region (incorporating Mackay) had a 2% participation rate in mountain biking. If we were to apply this participation rate to the Mackay LGA population of 114,969, it could be estimated that there are approximately 2,299 riders in the Mackay region, a figure which would be expected to increase to 3,426 by 2036 based on current rates of participation and population projections. If you were to apply the same participation rate to the Greater Mackay Region (Mackay, Isaac, Whitsundays) with a population of 171,313, it could be estimated that there are approximately 3,426 MTB riders in this broader region. These figures are much higher than club memberships, as would be expected given the large informal participation base of MTB riding.

A strong local MTB market can have a positive impact on the local economy including through bike sales, equipment purchases and repairs at local bike shops, and frequenting cafes/bars/restaurants as an extension of riding activities. Local riders will also be likely to spend in townships near to destination trails e.g. Eungella-Finch Hatton. Furthermore, a strong local mountain biking market will be essential for any MTB tourism market to provide local knowledge and advocacy, and even establish/expand businesses to service the tourism market.

Furthermore, there are additional benefits that can be derived from a thriving local mountain biking market. Although pertaining to all cycling, the Queensland Government identifies that on average, every $1 invested in cycling infrastructure returns almost $5 to Queensland in health benefits, reduced traffic congestion and other benefits[25]. Although traffic congestion isn't of concern, health and social benefits (eg social connections) are attributable to mountain biking and can also have positive flow on effects to the local economy.

25 Qld Cycling Strategy: https://publications.qld.gov.au/dataset/queensland-cycling-strategy-2017-2027/resource/3f0c39d9-1df5-4fd5-a28a-9e3cfd7812f1

11.2 HEALTH

The Australian Health Policy Collaboration has released the Australian Health Tracker[26] which seeks to provide data on chronic diseases, conditions and their risk factors. The Health Tracker provides rates for children and adults who are overweight and obese, and those who are physically inactive.

According to this data, 71.7% of adult residents of the Mackay LGA were physically inactive, and over one-third is obese. Compared to the national average, the Mackay LGA has 22% more people who are obese and 8% more who are inactive, suggesting physical activity opportunities across the region are imperative.

Furthermore, physical inactivity has significant economic implications. The annual economic cost of physical inactivity in Australia (healthcare, productivity and mortality costs) was estimated to be $13.8 billion in 2008[27]. Similarly, reducing inactivity by 10% is estimated to lower health sector costs by $96 million annually and increase leisure-based productivity by $79 million, home-based productivity by $71 million and workforce productivity by $12 million[28]. Although health care costs are not the responsibility of local government, it would be reasonable to assert that health care costs are a burden for the community, and that the more money spent on healthcare related to physical inactivity, the less money available for other types of health care and other projects/spending which can benefit communities and regions.

11.3 MOUNTAIN BIKE TOURISM

Cycle tourism is growing in Australia and is becoming a "well defined product and key travel motivator[29]"

In a study conducted by Tourism Research Australia, a survey found that 15% of tourist trips involved a cycling experience as the main reason for their trip (11% as a participant, 4% as a spectator), and that although the cycle market is small, those involved are highly engage[30].

MTB tourism has the potential to contribute significantly to local economies. The following are examples of the types of services that would benefit from development of an MTB tourism market:

- Bike shops, including hire
- Accommodation services
- Food & beverage services
- Transportation services – flights, transfers, track shuttles
- Guided tours & tuition

There are many examples of regions where development of mountain biking trails has delivered or is estimated to deliver economic benefit. A series of Australian and New Zealand examples are provided in Table 14 below. This information identifies realised economic benefits derived ranged from $3.5 million to $18 million per annum.



26 http://www.atlasesaustralia.com.au/ahpc/

27 https://www.vichealth.vic.gov.au/media-and-resources/publications/physical-activity-and-sedentary-behaviour

28 Cadilhac et al. 2011cited in https://www.vichealth.vic.gov.au/media-and-resources/publications/physical-activity-and-sedentary-behaviour

29 Mountain biking: An opportunity to enhance economic development in Australian rural areas? Burgin, S., Hardiman, N., Faculty of Society and Design, Bond University, 2014. https://epublications.bond.edu.au/cgi/viewcontent.cgi?referer=https://www.google.com.au/&httpsredir=1&article=1075&context=fsd_papers

30 Growing Cycling in Victoria, Tourism Research Australia, https://www.tra.gov.au/ArticleDocuments/185/DVS_Growing_Cycling_Tourism_in_Victoria_FINAL.pdf.aspx?Embed=Y

Table 14: Examples of economic benefits of mountain biking

Case Study	Summary
Demonstrated economic benefit	
Blue Derby $3.1 million, 80km network	« 30,000 visitors in 2017 (trails opened in 2014) who spend four to five nights in Derby followed by another five nights elsewhere in Tasmania.[31] « Estimated to have an annual net impact of $15-18M annually to the local economy.[31] « The local council estimated the initial $3.1 m investment was responsible for increasing the local economy by $30m.[32] « Resulted in property market boom and business growth.[31] « A $2.5 million Federal Government grant enabled the project, aiming to develop a new industry to help the region recover from the collapse of the forestry industry.[33]
Smithfield Mountain Bike Park 25km of trails including UCI level	« In 2014 and 2016, the Smithfield Mountain Bike Park hosted Union Cycliste Internationale (UCI) Mountain Bike World Cup events, and in 2017 hosted the UCI World Championships. « The 2014 UCI event contributed an estimated $3.5 million to the Cairns Economy and had 10,000+ spectators.[34]
Rotorua 180km of trails on the outskirts of town	« 85,000 mountain biking visitors in 2007 (half of these came specifically to mountain bike).[35] « Mountain biker expenditure in the local economy totalled around $8.6M in 2009.[36] « Rotorua hosts 'Crankworx Rotorua' one of the biggest and most prestigious MTB events outside of the UCI World Cups and World Championships. In 2016 the week-long event attracted 15,439 visitations and generated a total output (i.e. revenue inclusive of all multiplier effects) of NZ$8M.[37]
Anticipated economic benefit	
Creswick Trails, Victoria[38] [39] $3 million, 100km trail network	« 80,000+ visitors and $9-12 million per year.
Harcourt Mountain Bike Park Proposed $2 million, 34km trail network	« Anticipating 100,000 visitors per year within five years.[40] « Anticipating economic benefit of $2.4 million in year 1, and $9.8 million by year 5. « Network now completed.
Nelson, NZ	« The Nelson-Tasman region: Estimated $17.1 million of new and retained spending will occur annually as a result of the MTB trails in the region. Including the flow on effect of this spending (multiplier effects), it will generate for a total of $15.5 million in GDP and total additional employment of 211 FTEs (Full Time Employees) bringing the full economic benefit to $30.5 million annually. « Nelson City: Estimated $8.5 million of new and retained spending will occur annually as a result of the MTB trails in Nelson City. Estimated $8.5 million in direct spending will in the first instance generate $4.5 million in GDP and provide employment for 79 FTEs. Including multiplier effect, it is estimated that the activity will generate a total of $14.5 million in expenditure, $7.5 million in GDP and total additional employment of 106 FTEs.

31 www.abc.net.au/news/2018-04-21/world-class-mountain-bike-trail-transforms-derby-from-ghost-tow/9677344

32 http://www.abc.net.au/news/2017-12-26/mountain-bike-trails-driving-major-change-in-derby/9276384

33 Qld Mountain Bike Strategy 2018, MTBA.

34 https://www.cairnspost.com.au/news/cairns/cairns-to-reap-over-35-million-in-benefits-from-mountain-bike-event/news-story/73706b0489587e0a8f6cff70ebbfb22b ; Queensland Cycling Strategy: https://publications.qld.gov.au/dataset/queensland-cycling-strategy-2017-2027/resource/3f0c39d9-1df5-4fd5-a28a-9e3cfd7812f1

35 https://www.tra.gov.au/ArticleDocuments/245/Mackay%20factsheet%2015_16.pdf.aspx?Embed=Y https://www.kentish.tas.gov.au/webdata/resources/files/KENTISH%20TRAILS%20%20MASTER%20PLAN%20Final%20Report%20Prepared%20by%20TRC%20Tourism%20280815.pdf

36 'Recreational Use and Economic Impact of Whakarewarewa Forest – 2009 Update', APR Consultants Ltd, March 2010.

37 '2016 Crankworx Rotorua: Economic Impact Assessment And Visitor Analysis Of The Event On Rotorua' by Apr Consultants Ltd, June 2016.

38 http://www.abc.net.au/news/2017-12-08/mountain-bike-boom-a-boon-for-country-towns/9153572

39 https://www.premier.vic.gov.au/wheels-in-motion-for-creswick-mountain-bike-trail/

40 https://www.planning.vic.gov.au/__data/assets/pdf_file/0018/71712/Attachment-3-Scoping-Study-Final-Harcourt-Mountain-Bike-Park.PDF

11.4 MAJOR EVENTS

In addition to MTB tourism, there are potential economic benefits to be gained from hosting major events.

MTBA indicates the following average economic impacts for the host region of key events:

- $570,000 for MTBA round events;
- $1.98 million for National Championships.

Furthermore, other mountain biking events also have the potential to generate significant revenue. For example, it has been estimated that the Crankworx MTB festival in Rotorua New Zealand delivered approximately $8 million for the Rotorua economy in 2016[41] [42].

Eungella-Finch Hatton's existing mountain biking and trail running event – the Mackay Mountain Marathon would already deliver some level of economic benefit. However, expanding this event commensurate with the level of opportunity presented by the development of a new multi-discipline purpose-built network would undoubtedly provide increased economic benefit.

11.5 ECONOMIC VALUE OF MOUNTAIN BIKING TO THE MACKAY REGION

In order to provide a high-level assessment of the scale of economic value that mountain biking may deliver for the Mackay region, we have firstly reviewed the region's current tourism market, and secondly, used existing data available on the visitation that may be expected from MTB.

11.5.1 MACKAY REGION TOURISM

In order to understand what economic benefits might be derived from development of the MTB market in the Mackay region, it is helpful to first understand the existing tourism market in the Mackay region.

Tourism Research Australia estimates that tourism directly represents 1.0% of the total Mackay economy (in GRP terms), compared to 5.3% for regional Queensland[43]. Tourism contributed an estimated $283 million to the Mackay regional economy and directly employed 1,800 people in 2015-16. The following table outlines a series of tourism expenditure information for the Mackay region.

Table 15: Tourism expenditure - Mackay Region[44]

	Domestic Day	Domestic Overnight	Interna-tional
Average stay (nights)	-	3 nights	13 nights
Average spend per trip	$151	$406	$617
Average spend per Night	-	$168	$148
Average spend (commercial accommodation) per night	-	$172	$58

11.5.2 POTENTIAL VALUE

The key value for an MTB market in the Mackay Region is Eungella-Finch Hatton. It has been assessed during this study that the Eungella-Finch Hatton destination is approaching potential similar to Blue Derby in Tasmania, although the opportunity is considered not quite equal. Furthermore, both destinations are relatively remote and located outside of a regional city, with Derby located 1 hour and 20 minutes from Launceston, and Eungella-Finch Hatton located approximately one hour from Mackay.

For these reasons, we have explored the visitation and economic return associated with Blue Derby. However, it is important to consider that Blue Derby's location could be considered more advantageous due to Tasmania's established tourism profile and direct flights between Launceston and a number of Australian capital cities.

Given these assessments, we have assumed that the potential at Eungella-Finch Hatton is 80% the value of the realised potential at Blue Derby in terms of visitation numbers. We have further conservatively assumed that these visitors would spend three nights in the Mackay region for mountain biking purposes in alignment with the current region average (evidence suggests that cycling tourists stay longer than other tourists[45]).

41 https://www.pinkbike.com/news/crankworx-adds-8-millionto-the-economy-2016.html

42 http://www.rotorualakescouncil.nz/our-council/media%20inquiries/Questions%20and%20Responses/Pages/19-April-2018.aspx

43 https://www.tra.gov.au/ArticleDocuments/245/Mackay%20factsheet%2015_16.pdf.aspx?Embed=Y

44 Tourism Research Australia, Tourism Regional Profile 2015 – Mackay, cited in Mackay Economic Profile June 2016. http://www.mackay.qld.gov.au/__data/assets/pdf_file/0014/216131/MRC_EP_DIGITAL.pdf

45 Bicycling Queensland 2018, Bike boom could bring massive boost in tourism dollars, accessed June 2018, https://bq.org.au/news/2018/02/bike-boom-bring-massive-boost-tourism-dollars/

Applying these assumptions, the following table demonstrates that Eungella-Finch Hatton Trail Town opportunity **could generate an annual economic benefit of $12.096 million to the Mackay region**, just based on visitor night expenditure. It does not take into consideration the potential benefit derived from flow-on benefits in the region, nor does it consider the potential contribution of the local MTB market.

However, in order to take a conservative approach, we have modelled two additional scenarios demonstrating the potential direct economic benefit resulting from lower visitation rates and fewer visitor nights. These results, presented in Table 16 below, show that with **visitation at only 50% that of Blue Derby, and with average visitor nights less than the current Mackay average, the direct economic benefit that may be expected is $6.048 million annually**, excluding any indirect benefits.

It is important to note, that these figures cannot be considered to encompass the full-range of economic benefit potential because they do not include any flow-on benefits or value attributable to strengthening of the local MTB market. These high-level figures are provided to give an indication of the level of economic benefit that attracting MTB tourists to the region could deliver.

Table 16: Potential visitor-derived economic benefits of Eungella-Finch Hatton destination trails.

	Scenario 1 80% visitation of Blue Derby	Scenario 2 75% visitation of Blue Derby	Scenario 3 50% visitation of Blue Derby
Number of visitors for mountain biking	24,000	22,500	18,000
Number of nights in Mackay Region	3	2.5 nights	2 nights
Average $ spend per night (excluding accommodation)	168	168	168
Estimated direct benefit from visitor stays	$12.096 million	$9.450 million	$6.048 million

Taking into consideration the economic benefits (both demonstrated and anticipated) in other locations, it is reasonable to suggest that these figures are very conservative for the level of significance the Eungella-Finch Hatton opportunity presents.

The opportunity presents as a return on investment. For an investment of around $2 m in planning, trails and support infrastructure, the conservative case estimates a direct return of around $6 m per year of additional expenditure. Add to this the flow on benefits of expenditure elsewhere in the economy, the accommodation spend, the travel spend and accompanying family undertaking other activities, and the results seen in Blue Derby are highly likely here.



Figure 32: Blue Derby, Tasmania (photo credit: World Trail)

12 RECOMMENDATIONS



12.1 STRATEGIC FRAMEWORK

The strategic framework provides overarching guidance for the subsequent identification of specific actions for mountain biking in the Mackay region.

12.1.1 VISION



Build the mountain biking sector in the Mackay Region to service both residents and visitors by maximising the potential of the region's unique attributes in a manner which delivers economic, social and environmental sustainability.

12.1.2 OBJECTIVES

This vision will be delivered through achievement of the following objectives:

PLANNING AND MANAGEMENT

Establish a coordinated planning and management framework.

COLLABORATION

Mobilise mountain biking stakeholders and infrastructure partners.

PARTICIPATION

Strengthen the grassroots mountain biking scene and grow participation.

INFRASTRUCTURE

Develop the anchor trails and continue to expand the trails network and support infrastructure.

TOURISM

Build the mountain biking tourism product and regional profile.

12.2 RECOMMENDED ACTIONS

A series of recommended actions have been identified which respond to each of the objectives with the intent of achieving the vision.

1. PLANNING AND MANAGEMENT

Establish a coordinated planning and management framework

Actions	Priority
1.1 **Implement the Mackay Region Mountain Bike Strategy through the following:** « Establish an internal task group to coordinate across Council Departments and to oversee and take responsibility for implementing the strategy. « Establish a stakeholder's alliance group that will support implementation (see Recommendation 1.2 below). « Seek funding to implement the actions identified in the strategy. « Review the status of implementation on an annual basis.	Ongoing
1.2 **Establish a Mackay Regional Mountain Bike Alliance which would act as the principal advocacy group for mountain biking in the region.** The Alliance should act as the key reference and coordination group to oversee the implementation and monitoring of this Strategy and collectively draw the resources together required to do so. Representatives from the following organisations should be present within this alliance: « Mackay Regional Council (Economic Development, Sport and Recreation, Natural Area Management) « Queensland Department of Sport, Recreation and the Arts (Sport and Recreation Services) « Queensland Department of Environment and Science (Queensland Parks and Wildlife) « Mackay Tourism « Mackay and District Mountain Bike Club « Commercial operators including bike shops « Schools (Mackay Christian College)	Immediate
1.3 **Undertake a Feasibility Study for the Eungella-Finch Trail Town.** This would incorporate: « Detailed trail planning and concept design, including the identification of specific parcels of land required. In particular, this should focus on the availability of public land tenures, with the goal of identifying parcels of land and corridors that provide access into the centre of Finch Hatton and Eungella Compliance with peak body and industry-leading guides on trail planning and construction will be essential as will the need to identify land use planning requirements. « Detailed assessment of environmental and cultural heritage values of the land parcels where trail development is proposed to occur, with the goal of identifying 'no-go areas' that the trails should avoid. « Detailed engagement with key stakeholders including traditional owners, land owners and communities and organisations local to the trail network. It is likely that this engagement would be required to be undertaken in stages throughout the development of this study e.g. before and after route and mapping have been identified so detailed discussions around the implications of this can be held. « Detailed economic modelling including economic benefits, quantity surveyors cost estimates for construction, and management and maintenance costs. « Overall assessment of feasibility. « Identification of specific support infrastructure required (and parameters for delivery) in Finch Hatton, Eungella and Mackay to support the Trail Town, including: amenities, visitor information, accommodation, transportation, bike hire & repair, general services and supplies, attractions and activities.	Immediate

1. PLANNING AND MANAGEMENT

Establish a coordinated planning and management framework

Actions	Priority
The key characteristics of the Eungella-Finch Hatton Trail Town should include: « High quality trail networks that are diverse, iconic and scenic « 100km+ of trails « An iconic 'hero' or anchor trail that becomes a major attractor for the development of Finch Hatton-Eungella as a trail town. « All styles/types of trails • This could include identification of specific trails suitable for e-bikes to respond to this emerging trend and a possible niche tourism offering. « Stacked loop trails located close to Finch Hatton « Point-to-point wilderness descending trails starting up in the mountains around Eungella and Broken River and finishing down in the valley near Finch Hatton. « Easier and flatter trails located on the valley floor, linking to Finch Hatton Gorge for swimming opportunities. « Full complement of rider support services. It is important to note that the outcomes of the Feasibility Study for the Eungella-Finch Hatton Trail Town will influence whether the remainder of the recommendations in this strategy should proceed. Should the study conclude that the project is not considered feasible, then the focus for MTB in Mackay should be on strengthening local and regional mountain biking at Mount Kinchant, Rowallan Park and a Mackay Urban MTB Park with a focus on local, regional and possibly state (at junior levels) participation.	
1.4 **Develop a detailed and prioritised Trails Master Plan to provide a consolidated spatial plan for mountain biking trails in the region.** This should incorporate: « Ground truthing existing mountain biking trails with an emphasis on Eungella-Finch Hatton, Mount Kinchant and Rowallan Park « Hierarchy/ classification of trails « Confirming or modifying the proposed trails and alignments identified by the MADMTB and specifically the anchor trail/ trail network « Identify suitable parcels « Identification of trail modifications and expansions « Mapping the trail network for the purpose of promotion and public use « Principles of environmental sustainability, including ensuring protection of natural assets whilst facilitating access.	Immediate
1.5 **Work with key partners including QPWS, MADMTBC and landholders to develop agreements around the ongoing management and maintenance of MTB trails.**	Short – medium term
1.6 **Seek the development of wider regional partnerships and opportunities with Whitsundays region.**	Short – medium term
1.7 **Seek to obtain relevant endorsements, permits and approvals such as planning permits, land use approvals, cultural heritage approvals as trail planning progresses.**	Ongoing
Rationale	
A collective effort will be required to develop the MTB sector in the Mackay region. It will require more than just Mackay Regional Council and MADMTBC to realise the vision and objectives of this plan. *It will be important to continue to strengthen the planning foundation which underpins development of the MTB sector in the Mackay region to provide further detailed analysis to inform implementation.*	

2. OBJECTIVE 3: COLLABORATION

Mobilise mountain biking stakeholders

Actions	Priority
2.1 **Employ the Mackay Regional Mountain Biking Alliance to act as at the nucleus of collaboration for mountain biking in the region** by seeking out and mobilise stakeholders, facilitating collaboration and partnership through implementation of this strategy and identifying new opportunities as they arise.	Ongoing
2.2 **Develop a Partnering Strategy for mountain biking in the region.** This strategy should: « Provide a framework for forming partnerships. « Provide criteria for partnership projects. Suggested criteria might include: • clear lead agency • multi-agency partnership • dedicated support of partnering agencies • strategic alignment across agencies/partners. « Identify all Mackay region mountain biking market stakeholders and determine their role in the market. « Identify specific key partnership projects which will be integral to launching the region's mountain biking market, with the first priority being delivery of the Eungella-Finch Hatton opportunity. The Stakeholder Map provided in Appendix 2 should be used assist in the development of this Partnering Strategy.	Short term
2.3 **Develop a package for political advocacy and infrastructure investment funding, aiming to seek endorsement for development of the Mackay region** as a mountain hiking hub, specific support for the Eungella-Finch Hatton Trail Town, and development of identified support to be requested e.g. funding etc. This package would need to accompany in-person meetings with key political figures to sell the Mackay mountain biking destination product, paying attention to benefits to be accrued.	Short term
2.4 **Seek to develop a network of schools within the region with a keen interest in supporting mountain biking, from a participation and a skills development perspective.**	Short – medium term
2.5 **Seek to identify partnerships with Central Queensland University to explore opportunities for students to undertake research and placements which would support the development of the Mackay region mountain biking market** through their studies e.g. project management, communications, digital media, human movement/exercise and sport sciences, engineering and construction, risk management.	Short-medium term

Rationale

A collective effort will be required to develop the MTB sector in the Mackay region. It will require more than just Mackay Regional Council and the Mountain Bike Club to realise the vision and objectives of this plan. Many stakeholders can benefit from development of the region's MTB market, and careful consideration of who these stakeholders are and what the opportunities might be presents the possibility of mutual benefit.

3. PARTICIPATION

Strengthen the grassroots mountain biking scene and grow participation

Actions	Priority
3.1 **Partner with the Mackay and District Mountain Bike Club and Mountain Bike Australia to embark on a program of club development incorporating:** « Strategic and business planning to identify specific areas of priority in order to strengthen and grow the club. « Skill development in areas of need e.g. governance, financial management, volunteer management, event planning and management, coaching and officiating, and trail building and maintenance. « Participation drive. « Volunteer drive. Club growth, social sustainability, and increased participation are key goals of this action.	Short term & ongoing
3.2 **Work with Mackay Christian College to support their mountain biking excellence program** and, in concert with MADMTC and the Mackay Mountain Biking Alliance, identify opportunities to develop similar programs in other Mackay schools with the aim of generating interest for mountain biking amongst children and young people in the region (see recommendation 2.4).	Short term
3.3 **Build on the Mackay Mountain Marathon, MAD Rush 6hr, and ZACH MACH events to seek further development of these important events,** with an initial emphasis on increasing local and regional interest and participation. Links to the development of the Eungella-Finch Hatton Trail Town strategy and the anchor trail to create exposure should be considered as a way of expanding the events and helping to promote the region. Assistance to be considered should incorporate the development of an event plan (including marketing at promotion) which would seek to expand participation and enhance delivery, and provision of funding to implement identified event improvements. Medium to longer term aspirations for this event should be to attract further state, national and international interest.	Short term
3.4 **Identify regional, state, national and international MTB events that are suitable for the region and develop a schedule for bidding for these events.** This task should consider immediate opportunities at existing locations and medium-long term opportunities to coincide with new/upgraded trail facilities as they come online. It should also explore specific requirements of each event.	Medium term

Rationale

Supporting the groups that provide the foundation for the local MTB market is imperative for growth of the market for tourism. These groups will provide technical knowledge, practical support and a volunteer base which will be critically valuable to the Mackay MTB tourism market. Furthermore, they are an important asset in growing local participation which will add strength to the region-wide market.

4. INFRASTRUCTURE

Expand the trails network and support infrastructure

Actions		Priority
4.1	**Undertake the staged development of the Eungella-Finch Hatton Mountain Bike Park as a nationally/ internationally significant multi-discipline all-levels trail network, in accordance with the detailed findings of the feasibility study.** Development of appropriate support infrastructure concurrently, including amenities, transportation and tourist services. The initial priority for the Eungella-Finch Hatton Trail Town is a signature beginner-to-intermediate level Flow descent trail which seeks to present the full impact of the region's elevation and natural assets, offering breathtaking views and access to the area's most stunning landmarks. This initial project is an iconic 'hero trail' that will anchor the development of tourism profile and MTB market product. It would be a point-to-point trail, 20-30km in length, which would require a wide range of rider support services, including shuttles. Delivering a high-quality and remarkable trail will be the first critical step in generating a groundswell of interest for the region as an MTB destination. Following development of the 'hero' trail, annual trail expansion should be undertaken to achieve 80-100 km of trails, with at least 50km of trails to be delivered rapidly (within the first two years) in order to reach the 'tipping point' where riders will stay longer.	Short term – medium term
4.2	**Identify a suitable site for the Mackay Urban MTB Park during development of the Trails Master Plan.** This site should: « At least be 0.5 Ha in size. « Be Council owned or managed land. « Ideally co-located with other sport/recreation facilities to minimise infrastructure requirements eg car parking, toilets. Co-location with skate parks can be successful. « Be flat with minimal vegetation (although large shade trees are valuable). « Provide a pump track, dirt jumps, and skills trails. Consider the old tip site off Petrie St, East Mackay in initial investigations.	Short term
4.3	**Once a site is identified, embark on detailed planning and implementation to deliver the Urban MTB Park.**	Short term
4.4	**Develop Mt Kinchant Regional Park as a regionally/state-significant trail network with a focus on gravity style trails in accordance with the Trails Master Plan.** It will be required that negotiations take place between Council, MADMTB Club and QPWS to agree on roles and responsibilities for development, maintenance and management of the trail network.	Medium term
4.5	**Continue to develop Rowallan Park as a regionally/state-significant cross-country trail network in accordance with the Trails Master Plan.** It will be required that negotiations take place with MADMTB Club and Scouts Queensland Inc Central Coast Region to seek broader community access to the trail network in order to optimise the value of this site.	Long term
4.6	**Incorporate the development of pump tracks into youth facility provision across the region wherever possible/ appropriate.**	Ongoing

Rationale

The Eungella-Finch Hatton Mountain Bike Park (or another preferred name e.g. Pioneer Valley MTB Park) is the essential foundation project for the Mackay region MTB market. Without this infrastructure project, the region is not likely to achieve any level of a MTB tourism market. Consequently, progression of this project as an extremely high-quality opportunity is the essential starting point.

Mount Kinchant and Rowallan Park have very important support roles to play in terms of developing the market and providing variety in the MTB offering in the region.

An urban MTB opportunity is critical for local MTB growth and skill progression, particularly for children and young people where participants may not have access to transport to travel to outlying trails.

5. TOURISM

Build the mountain biking tourism product

Actions	Priority
5.1 **Develop a Marketing and Promotion plan and campaign for mountain biking participation in the region. This work should be accompanied by trail maps and education and awareness around trail etiquette.** It should also include developing a brand similar to "Ride Cairns", "Ride Explore Live Blue Derby/Tasmania" or "Ride Rotorua". The plan should identify an approach for distinct markets, including: « Local participants - in club activities, events and informal riding. « Regional and state participation – in key competition-focused and mass-participation events and informal participation. « National participation – MTB tourism and events. « International participation - MTB tourism and events.	Short term
5.2 **Develop a suite of information on mountain biking in the Mackay Region which incorporates:** « Mapping of trails networks at key locations (including Eungella-Finch Hatton Mountain Bike Park, Mount Kinchant Mountain Bike Park and Rowallan Mountain Bike Park). « Production of high-quality region-wide guides and venue-specific guides. « Delivery via online platforms and consider hard-copy for targeted purposes. « Consider development of an app for the MTB region which contains trail maps, details of rider support services and accommodation and hospitality packages. Mapping content should be available offline to enable use in areas without mobile range.	Short term and ongoing
5.3 **In partnership with Tourism Mackay and suppliers in the Mackay region, identify rider support services required with particular emphasis on:** « Bike-friendly transportation, including shuttles to and from key MTB sites. « MTB hire and bike repair. « MTB tours, guiding and skills development. « Allied health e.g. massage and/or physiotherapy. All of these services should be provided within the Eungella/Finch Hatton Trail Town and coincide with the development of the trail network. Public-private partnerships should be sought to deliver critical rider support services. Support for private operators to establish commercial activities should be provided, including business development advice and seed-funding contributions if required.	Immediate-short term
5.4 **In partnership with Tourism Mackay and suppliers in the Mackay region, identify accommodation and hospitality offers specifically targeting MTB riders.** Seek specific rider packaging which incorporates the rider support services identified in Action 5.3 as well as a variety of accommodation options, food and beverage services, and complementary activities eg hiking, salt/fresh water sports, reef trips, hang/paragliding and cultural touring. Consider variety of packages targeting: « Eco-tourism/soft/relaxation/quiet adventure packages focused around easy trails and natural assets, wildlife encounters etc. « Adventure packages for more experienced/ competitive/ thrill-seeking travellers. « Female riders similar to the "mind, body, bike" experience at Mt Buller. « Family groups with complementary activities. « Cultural and historical interests. « Backpackers eg work-bike packages. « High end experiences - riding + gourmet food and wine .	Short term

Rationale

In order to build a viable MTB market in the Mackay region, appropriate rider support services and tourism infrastructure will be critical. Without these key elements, the trails may fail to thrive, and the future viability of the proposed Eungella-Finch Hatton Trail Town is questionable.

13 IMPLEMENTATION PLAN



Immediate – within the next 6 months | **Short Term** – within 2 years | **Medium Term** – 2-5 years | **Long Term** – 5 years + | **Ongoing**

Action	Ref.	Priority	Resourcing	Funding & Partnerships	Responsibility
Implement the Mackay Region Mountain Bike Strategy through the following: « Establish an internal task group to coordinate across Council Departments and to oversee and take responsibility for implementing the strategy « Establish a stakeholder's alliance groups that will support implementation (see Recommendation 1.2 below). « Seek funding to implement the actions identified in the strategy. « Review the status of implementation on an annual basis.	1.1	Immediate & Ongoing	Staff time, implementation costs as per below.	State and federal government agencies. Members of Regional Mountain Bike Alliance.	Council – Economic Development, Sport & Recreation Services.
Establish a Mackay Regional Mountain Bike Alliance which would act as the principal advocacy group for mountain biking in the region. The Alliance should act as the key reference and coordination group to oversee the implementation and monitoring of this Strategy and collectively draw the resources together required to do so. Representatives from the following organisations should be present within this alliance: « Mackay Regional Council (Economic Development, Sport and Recreation, Natural Area Management) « Queensland Department of Sport, Recreation and the Arts (Sport and Recreation Services) « Queensland Department of Environment and Science (Queensland Parks and Wildlife) « Mackay Tourism « Mackay and District Mountain Bike Club « Commercial operators including bike shops « Schools (Mackay Christian College)	1.2	Immediate	Staff time, minimal budget for admin & meetings.	« Council (Economic Development, Sport and Recreation, Natural Area Management) « Queensland Government (Sport and Recreation Services; Qld Parks & Wildlife) « Mackay Tourism « MADMTBC « Commercial operators « Schools	Council - Community & Client Services, Sport & Recreation, Economic Development

Action	Ref.	Priority	Resourcing	Funding & Partnerships	Responsibility
Undertake a Feasibility Study for the Eungella-Finch Trail Town. This would incorporate: « Detailed trail planning and concept design, including the identification of specific parcels of land required. « Compliance with peak body and industry-leading guides on trail planning and construction will be essential, as will the need to identify land use planning requirements. « Detailed engagement with key stakeholders including traditional owners, land owners and communities and organisations local to the trail network. It is likely that this engagement would be required to be undertaken in stages throughout the development of this study e.g. before and after route and mapping have been identified so detailed discussions around the implications of this can be held. « Detailed economic modelling including economic benefits, quantity surveyors cost estimates for construction, and management and maintenance costs. « Overall assessment of feasibility. « Identification of specific support infrastructure required (and parameters for deliver) in Finch Hatton and Eungella and Mackay to support the Trail Town, including: amenities, visitor information, accommodation, transportation, bike hire & repair, general services and supplies, attractions and activities. The key characteristics of the Eungella-Finch Hatton Trail Town should include: « High quality trail networks that are diverse, iconic and scenic. « 100km+ of trails. « All styles/types of trails. « This could include identification of specific trails suitable for e-bikes to respond to this emerging trend and a possible niche tourism offering. « Stacked loop trails located close to Finch Hatton. « Point-to-point wilderness descending trails starting up in the mountains around Eungella and Broken River and finishing down in the valley near Finch Hatton. « Easier and flatter trails located on the valley floor, linking to Finch Hatton Gorge for swimming opportunities. « Full complement of rider support services. It is important to note that the outcomes of the Feasibility Study for the Eungella-Finch Hatton Trail Town will influence whether the remainder of the recommendations in this strategy should proceed. Should the study conclude that the project does is not considered feasible, then the focus for mountain biking in Mackay should focus on strengthening local and regional mountain biking at Mount Kinchant, Rowallan Park and a Mackay Urban MTB Park with a focus on local, regional and possibly state (at junior levels) participation.	1.3	Immediate	$80,000-$100,000 for trail planning & concept design and more detailed economic and tourism analysis. Staff time to plan, coordinate & support study.	Possibly Queensland Government Sport and Recreation Funding	Council - Economic Development.

Action	Ref.	Priority	Resourcing	Funding & Partnerships	Responsibility
Develop a detailed long-term Trails Master Plan to provide a consolidated spatial plan for mountain biking trails in the region. This should incorporate: « Ground truthing existing mountain biking trails with an emphasis on Eungella-Finch Hatton, Mount Kinchant and Rowallan Park. « Hierarchy/ classification of trails. « Identify suitable parcels. « Identification of trail modifications and expansions. « Mapping the trail network, for the purpose of promotion and public use. Principles of environmental sustainability, including ensuring protection of natural assets whilst facilitating access.	1.4	Immediate	$100K Staff time to plan, coordinate & support study.	Possibly Queensland Government Sport and Recreation Funding	Council – Economic Development/ Sport & Recreation.
In partnership with Tourism Mackay and suppliers in the Mackay region, identify rider support services required with particular emphasis on: « Bike-friendly transportation, including shuttles to and from key MTB sites. « MTB hire and bike repair « MTB tours, guiding and skills development « Allied health e.g. massage and/or physiotherapy All of these services should be provided within the Eungella-Finch Hatton Trail Town and their delivery should coincide with the development of the trail network. Public-private partnerships should be sought to deliver critical rider support services. Support for private operators to establish commercial activities should be provided, including business development advice and seed-funding contributions if required.	5.3	Immediate-short term	Staff time. Individual action costs to be determined.	Private Sector Qld Govt. small business grants.	Private sector with support from Council, Qld Govt.
Partner with the Mackay and District Mountain Bike Club and Mountain Bike Australia to embark on a program of club development incorporating: « Strategic and business planning to identify specific areas of priority in order to strengthen and grow the club. « Skill development in areas of need e.g. governance, financial management, volunteer management, event planning and management, coaching and officiating, and trail building and maintenance. « Participation drive. « Volunteer drive. Club growth, social sustainability, and increased participation are key goals of this action.	3.1	Short Term & Ongoing	$10k	Possibly Queensland Government Sport and Recreation Funding MTBA	Council- Sport & Recreation

Action	Ref.	Priority	Resourcing	Funding & Partnerships	Responsibility
Develop a Partnering Strategy for mountain biking in the region. This strategy should: « Provide a framework for forming partnerships. « Provide criteria for partnership projects. Suggested criteria might include: • clear lead agency. • multi-agency partnership. • dedicated support of partnering agencies. • strategic alignment across agencies/partners. • identify all Mackay region mountain biking market stakeholders and determine their role in the market. • identify specific key partnership projects which will be integral to launching the region's mountain biking market, with the first priority being delivery of the Eungella-Finch Hatton opportunity. The Stakeholder Map provided in Appendix 2 should be used assist in the development of this Partnering Strategy.	2.2	Short Term	Staff time	See Stakeholder Map in Appendix 2.	Council - Community & Client Services, Sport & Recreation, Economic Development
Develop a package for political advocacy and infrastructure investment and funding support, aiming to seek endorsement for development of the Mackay region as a mountain hiking hub, specific support for the Eungella-Finch Hatton Trail Town, and development of identified support to be requested e.g. funding etc. This package would need to accompany in-person meetings with key political figures to sell the Mackay mountain biking destination product, paying attention to benefits to be accrued.	2.3	Short Term	Staff time	Queensland Government – Sport & Recreation, QPWS, Tourism, MTBA.	Council – Economic Development, Community & Client Services, Office of the Mayor and CEO.
Develop a suite of information on mountain biking in the Mackay Region which incorporates: « Mapping of trails networks at key locations (including Eungella-Finch Hatton Mountain Bike Park, Mount Kinchant Mountain Bike Park and Rowallan Mountain Bike Park) « Production of high-quality region-wide guides and venue-specific guides. « Delivery via online platforms and consider hard-copy for targeted purposes. Consider development of an app for the MTB region which contains trail maps, details of rider support services and accommodation and hospitality packages. Mapping content should be available offline to enable use in areas without mobile range.	5.2	Short Term and ongoing	Staff time. Marketing, design, and online platform development costs. $20,000	QPWS, MADMTBC Possibly Queensland Government Sport and Recreation Funding	Council – Economic Development, Sport & Recreation Services, Community & Client Services.

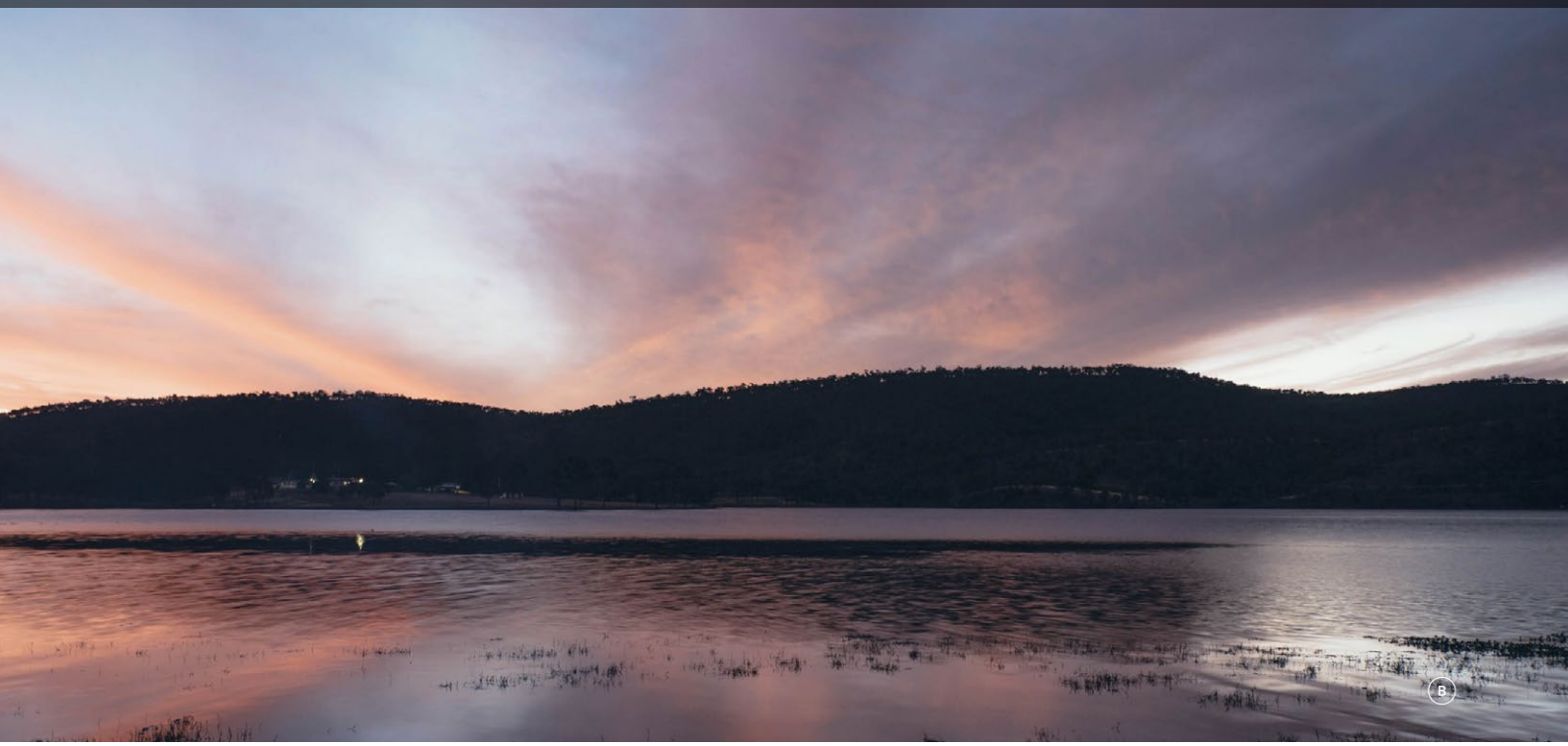
Action	Ref.	Priority	Resourcing	Funding & Partnerships	Responsibility
Collaborate with the organisers of the Mackay Mountain Marathon, MAD Rush 6hr, and ZACH MACH events to seek further development of these signature events with an initial emphasis on increasing local and regional interest and participation. Linking to the development of the Trail Town Strategy and the Anchor Trail to create exposure should be considered as a way of expanding the events and helping to promote the region. Assistance to be considered should incorporate the development of an event plan (including marketing at promotion) which would seek to expand participation and enhance delivery, and provision of funding to implement identified event improvements. Medium to longer term aspirations for this event should be to attract further state, national and international interest.	3.3	Short Term	Staff time Event funding contribution if possible.	Possibly Queensland Government Sport and Recreation Funding MTBC Organising Committees Bike shops	Council – Sport & Rec, Economic Development.
Work with Mackay Christian College to support their mountain biking excellence program and, in concert with MADMTC and the Mackay Mountain Biking Alliance, identify opportunities to develop similar programs in other Mackay schools with the aim of generating interest for mountain biking amongst children and young people in the region.	3.2	Short Term	Staff time	Mackay Christian College, Schools, Mackay-Capricornia School Sport	Council – Sport & Recreation
Identify a suitable site for the Mackay Urban MTB Park during development of the Trails Master Plan. This site should: « At least be 0.5 Ha in size. « Be Council owned or managed land. « Ideally be co-located with other sporting/recreational facilities to minimise requirements for infrastructure items like car parking, toilets etc. Co-location with skate parks can be successful. « Be flat with minimal vegetation (although large shade trees are valuable). « Provide a pump track, dirt jumps, and skills trails. Consider the old tip site off Petrie St, East Mackay in initial investigations.	4.2	Short Term	Staff time	MADMTBC	Council – Sport & Recreation
Once a site is identified, embark on detailed planning and implementation to deliver the Urban MTB Park.	4.3	Short Term	$200,000	Qld Govt Sport & Recreation funding. MADMTBC, bike shops	Council – Sport & Recreation

Action	Ref.	Priority	Resourcing	Funding & Partnerships	Responsibility
Develop a Marketing and Promotion plan and campaign for mountain biking participation in the region. This work should be accompanied by trail maps and education and awareness around trail etiquette. It should also include developing a brand similar to "Ride Cairns", "Ride Explore Live Blue Derby/Tasmania" or "Ride Rotorua". The plan should identify an approach for distinct markets, including: « Local participants - in club activities, events and informal riding. « Regional and state participation – in key competition-focused and mass-participation events and informal participation. « National participation – MTB tourism and events « International participation - MTB tourism and events	5.1	Short Term	Staff time and budget for marketing expertise and production costs Est. $40,000	Tourism Mackay.	Council – Economic Development, Sport & Recreation Services, Community & Client Services.
In partnership with Tourism Mackay and suppliers in the Mackay region, identify accommodation and hospitality offers specifically targeting MTB riders. Seek specific rider packaging which incorporates the rider support services identified in Action 5.3 as well as a variety of accommodation options, food and beverage services, and complementary activities e.g hiking, salt/fresh water sports, reef trips, hang/paragliding and cultural touring. Consider variety of packages targeting: « Eco-tourism/ soft/ relaxation/ quiet adventure packages focused around easy trails and natural assets, wildlife encounters etc. « Adventure packages for more experienced/ competitive/ thrill-seeking travellers. « Female riders similar to the "mind, body, bike" experience at Mt Buller. « Family groups with complementary activities. « Cultural and historical interests. « Backpackers eg work-bike packages. « High end experiences - riding + gourmet food and wine.	5.4	Short term	Staff time	Tourism Mackay, private sector incl. tourism business operators in Eungella-Finch Hatton and Mackay.	Council – Economic Development, Community & Client Services.
Work with key partners including QPWS, MADMTBC and landholders to develop agreements around the ongoing management and maintenance of MTB trails.	1.5	Short term	Staff time	QPWS, MADMTBC and landholders	Council – Property & legal services
Seek to develop a network of schools within the region with a keen interest in supporting mountain biking from a participation and a skills development perspective.	2.4	Short – Medium Term	Staff time	Schools, Mackay-Capricornia School Sport	Council – sport & recreation
Seek to identify partnerships with Central Queensland University to explore opportunities for students to undertake research and placements which would support the development of the Mackay region mountain biking market through their studies e.g. project management, communications, digital media, human movement/exercise and sport sciences, engineering and construction, risk management.	2.5	Short-Medium Term	Staff time. Possible partnership contribution to projects.	Central Queensland University, MADMTBC, Queensland Government.	Council – economic development, sport and recreation, Community & client services

Action	Ref.	Priority	Resourcing	Funding & Partnerships	Responsibility
Undertake the staged development of the Eungella-Finch Hatton Mountain Bike Park as a nationally/ internationally significant multi-discipline all-levels trail network, in accordance with the detailed findings of the feasibility study. Initial priority is the development of a key 'hero' trail which will be the catalyst to build the network around and promote the region. An initial 30 km is likely to be required rapidly followed by annual trail expansion to achieve 80-100 km of trails (50km of trails to be delivered rapidly to reach the 'tipping point' where riders will stay longer). Concurrent development of appropriate support infrastructure including amenities, transportation and tourist services.	4.1	Short Term – Medium Term	Suggest rate of $50/m for trail construction, not inclusive of any structures such as bridges, shelters etc. $1.5 M- $2.0 M for the initial investment. With follow up funding over the next few years.	Regional Growth Fund – Australian Government Jobs & Regional Growth Fund - Queensland Government. Qld Government Bike Trails Funding	Council – economic development, sport and recreation, Community & client services, development services.
Identify regional, state, national and international events that are suitable for the region and develop a schedule for bidding for these events. This task should consider immediate opportunities at existing locations and medium-long term opportunities to coincide with new/upgraded trail facilities as they come online. It should also explore specific requirements of each event	3.4	Medium Term	Staff time, event bidding/ hosting fees	Queensland Destination Events Program	Council – economic development/ sport & recreation
Develop Mt Kinchant Regional Park as a regionally/state-significant trail network with a focus on gravity style trails in accordance with the Trails Master Plan. It will be required that negotiations take place between Council, MADMTB Club and QPWS to agree on roles and responsibilities for development, maintenance and management of the trail network.	4.4	Medium Term	$50/m for trail construction to reflect higher construction costs of gravity trails, not inclusive of any structures such as bridges, shelters etc. Between $500,000 and $1 million for 10 or 20km of trail development.	Get Playing Places & Spaces; and Get Playing Plus program - Queensland Government Sport & Recreation. MADMTBC	MADMTBC, Council – sport & recreation

Action	Ref.	Priority	Resourcing	Funding & Partnerships	Responsibility
Continue to develop Rowallan Park as a regionally/state-significant cross-country trail network in accordance with the Trails Master Plan. It will be required that negotiations take place with MADMTB Club and Scouts Queensland Inc Central Coast Region to seek broader community access to the trail network in order to optimise the value of this site.	4.5	Long Term	$50/m for trail construction to reflect higher construction costs of gravity trails, not inclusive of any structures such as bridges, shelters etc.	Get Playing Places & Spaces; and Get Playing Plus program - Queensland Government Sport & Recreation.	MADMTBC
Seek to obtain relevant endorsements, permits and approvals such as planning permits, land use approvals, cultural heritage approvals as trail planning progresses.	1.6	Ongoing	Staff time, nominal budget for permit/ application fees	MADMTBC, Traditional Owners, Queensland Government.	Council – property & legal services
Employ the Mackay Regional Mountain Biking Alliance to act as at the nucleus of collaboration for mountain biking in the region by seeking out and mobilise stakeholders, facilitating collaboration and partnership through implementation of this strategy and identifying new opportunities as they arise.	2.1	Ongoing	Staff time.	MADMTBC, State Government, Federal Government, Traditional Owners, Priviate Land Owners, Education Sector, Commercial Sector.	Council – Economic Development, Sport and Recreation
Incorporate the development of pump tracks into youth facility provision across the region wherever possible/ appropriate.	4.6	Ongoing	Asphalt pump tracks range from $250,000 - $600,000, depending on size, complexity and landscaping.	Get Playing Places & Spaces; and Get Playing Plus program - Queensland Government Sport & Recreation. MADMTBC	Council Sport & Recreation

14 WARRANTIES AND DISCLAIMERS



The information contained in this report is provided in good faith. While Otium Planning Group has applied their own experience to the task, they have relied upon information supplied to them by other persons and organisations.

We have not conducted an audit of the information provided by others but have accepted it in good faith. Some of the information may have been provided 'commercial in confidence' and as such these venues or sources of information are not specifically identified. Readers should be aware that the preparation of this report may have necessitated projections of the future that are inherently uncertain and that our opinion is based on the underlying representations, assumptions and projections detailed in this report.

There will be differences between projected and actual results, because events and circumstances frequently do not occur as expected and those differences may be material. We do not express an opinion as to whether actual results will approximate projected results, nor can we confirm, underwrite or guarantee the achievability of the projections as it is not possible to substantiate assumptions which are based on future events.

Accordingly, neither Otium Planning Group, nor any member or employee of Otium Planning Group, undertakes responsibility arising in any way whatsoever to any persons other than client in respect of this report, for any errors or omissions herein, arising through negligence or otherwise however caused.

APPENDIX 1: TECHNICAL INFORMATION

Rating	Very Easy	Easiest	More Difficult	Very Difficult	Extremely Difficult
Symbol					
Description	Likely to be a fire road or wide single track with a gentle gradient, smooth surface and free of obstacles. Frequent encounters are likely with other cyclists, walkers, runners and horse riders.	Likely to be a combination of fire road or wide single track with a gentle gradient, smooth surface and relatively free of obstacles. Short sections may exceed these criteria. Frequent encounters are likely with other cyclists, walkers, runners and horse riders.	Likely to be a single trail with moderate gradients, variable surface and obstacles. Dual use or preferred use. Optional lines desirable.	Likely to be a challenging single trail with steep gradients, variable surface and many obstacles. Single use and direction. Optional lines. XC, DH or trials	Extremely difficult trails will incorporate very steep gradients, highly variable surface and unavoidable, severe obstacles. Single use and direction. Optional lines. XC, DH or trials.
Trail width	2100mm plus or minus 900mm.	900mm plus or minus 300mm for tread or bridges.	600mm plus or minus 300mm for tread or bridges.	300mm plus or minus 150mm for tread and bridges. Structures can vary.	150mm plus or minus 100mm for tread or bridges. Structures can vary.
Trail surface	Hardened or smooth.	Mostly firm and stable.	Possible sections of rocky or loose tread.	Variable and challenging.	Widely variable and unpredictable.
Average trail grade	Climbs and descents are mostly shallow. Less than 5% average.	Climbs and descents are mostly shallow, but may include some moderately steep sections. 7% or less average.	Mostly moderate gradients but may include steep sections. 10% or less average.	Contains steeper descents or climbs. 20% or less average.	Expect prolonged steep, loose and rocky descents or climbs. 20% or greater average
Maximum trail grade	Max 10%	Max 15%	Max 20% or greater.	Max 20% or greater.	Max 40% or greater.
Level of trail exposure	Firm and level fall zone to either side of trail corridor.	Exposure to either side of trail corridor includes downward slopes of up to 10%	Exposure to either side of trail corridor includes downward slopes of up to 20%	Exposure to either side of trail corridor includes steep downward slopes or free-fall.	Exposure to either side of trail corridor includes steep downward slopes or free-fall.

Rating	Very Easy	Easiest	More Difficult	Very Difficult	Extremely Difficult
Natural obstacles and technical trail features (TTFs)	No obstacles.	Unavoidable obstacles to 50mm (2") high, such as logs, roots and rocks. Avoidable, rollable obstacles may be present. Unavoidable bridges 900mm wide. Short sections may exceed criteria.	Unavoidable, rollable obstacles to 200mm (8") high, such as logs, roots and rocks. Avoidable obstacles to 600mm may be present. Unavoidable bridges 600mm wide. Width of deck is half the height. Short sections may exceed criteria.	Unavoidable obstacles to 380mm (15") high, such as logs, roots, rocks, drop-offs or constructed obstacles. Avoidable obstacles to 1200mm may be present. Unavoidable bridges 600mm wide. Width of deck is half the height. Short sections may exceed criteria.	Large, committing and unavoidable obstacles to 380mm (15") high. Avoidable obstacles to 1200mm may be present. Unavoidable bridges 600mm or narrower. Width of bridges is unpredictable. Short sections may exceed criteria.

A, B AND C LINES

Mountain biking can be a hazardous sport at times and risk management is highly important in designing a trail system. World Trail designs incorporate a number of risk management practices that aim to reduce injury and user risk. These practices include the A-B-C lines system as well as prominent trail signage.

The A-B-C lines system gives riders of varying riding abilities options when riding a specific trail. The system provides options for beginner, intermediate and advanced riders when a challenging section of terrain presents itself on a trail, while limiting any 'forced' accidents that could occur. A forced accident occurs when a difficult section of trail has no options available to the rider, and the rider is forced into a 'snap decision' on how to negotiate a difficult route. The rider may be forced into a position that is beyond his or her own skill level.

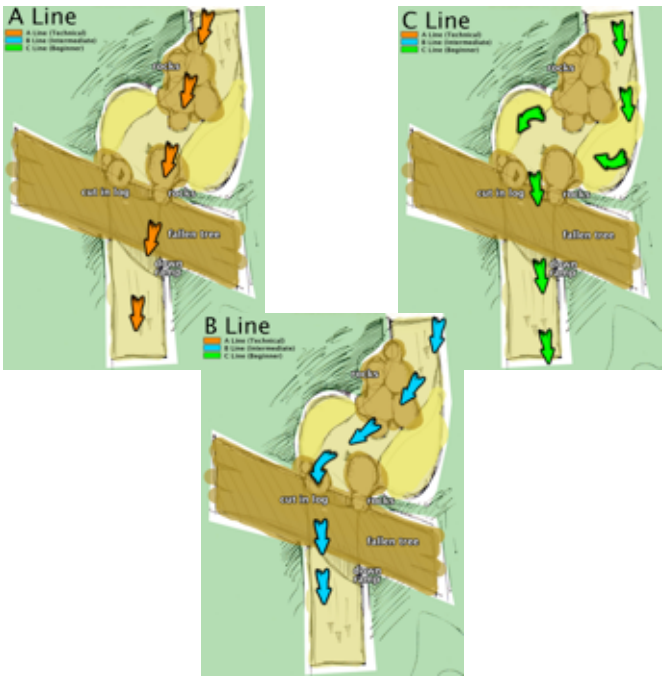
With an A-B-C lines system, the trail splits into two (2) or three (3) different options with verifying degrees of difficulty designed to cater for all users. By employing A-B-C options on a particular trail, users of different abilities can ride together in groups and still have a challenging and enjoyable experience.

The ABC lines system is beneficial as it reduces the rider's risk if they are not comfortable with a particular section of the trail. A-B-C lines can be implemented on natural technical areas such as rocky outcrops, fallen logs or gully crossings, or with specifically constructed obstacles.

A-B-C lines need to be signposted effectively to reflect the difficulty rating of the riding line that the user has chosen to negotiate.

There are some simple rules that should be applied when using the A-B-C Lines system:

1. The most difficult line is referred to as the A line;
2. The easiest line should match the overall trail difficulty rating of the trail;
3. The hardest line shouldn't be more than one rating category above the overall trail difficulty rating of the trail. For example, an 'Easy' trail should not have any 'Very Difficult' A-lines, but it could include 'More Difficult' A lines;
4. The most difficult line should be the quickest route. The easiest line should be the slowest route. In a race situation, this means that the most skilled or most daring rider gains a time bonus.



COMPETITIVE MTB DISCIPLINE DEFINITIONS

Cross-country

Cross-country mountain biking is the oldest discipline within the sport and is analogous to cross-country running or skiing. It involves riding across all types of terrain and slopes. Participants may be seeking thrills, fitness or the opportunity to enjoy nature. Specialised cross-country mountain bikes are lightweight, with many gears, including extremely low gearing for steep hills and generally have front suspension and often rear suspension. Cross-country trails are similar to walking trails – narrow singletrack corridors through the bush, only slightly wider than a set of handlebars, although they can be as wide as a vehicle trail. Cross-country racing consists of a number of formats:

- Olympic format – the most traditional form of cross-country race, consisting of multiple laps (the number of laps depends on the skill category) of a 4-6km loop. Each lap generally takes in a wide variety of terrain, with climbs, descents and numerous technical features;
- Short course format – this is a relatively new format, comprising of a 500-1000m loop with numerous technical features. This format is generally intended to provide good spectating and media opportunities and races are intended to be short, fast and intense;
- Marathon format – this format has shown huge growth in recent years. Courses may comprise of a set distance (50km or 100km are popular) or a set duration (8, 12 or 24 hours are popular), with either shorter, multiple laps or longer, single laps.

Downhill

Analogous to downhill skiing, downhill mountain biking is a speed-oriented sport, where participants start at the top of the hill and ride down. As downhill bikes are not designed for riding up hills, transport is required to get riders and their bikes back to the top of the hill. Downhill bikes have both front and rear suspension, are heavy and generally have fewer gears than cross-country bikes. As downhill often involves high speeds and crashes are more common, participants wear full-face helmets and extensive body armour to protect themselves. Downhill trails are generally more technically difficult than cross-country trails and may include drop-offs, jumps, rough terrain and steep gradients. Due to the high speeds, heavy bikes and rider preferences for steep gradients, downhill trails are more subject to erosion than cross-country trails. Careful design and construction, including close attention to gradients and corners is essential to reduce the environmental impacts of downhill trails. Downhill trails are by definition point to point trails, require a fairly large amount of space and clearly require a downhill slope, with access top and bottom.

Gravity Enduro

This category borrows elements from all disciplines. Gravity Enduro is primarily focussed with descending but doesn't focus on speed and steepness as much as downhill per se. Competitive events in this category typically include long descents with some uphill sections, which typically are not timed. Riders win based on their cumulative time for all the descending sections. Gravity enduro bikes typically feature front and rear suspension but are typically not as heavy as downhill bikes. It is showing very strong growth at the moment and seems to be running in parallel with the evolution of modern mountain bikes. Similar to cross-country mountain biking, gravity enduro riding requires an ethos of self-sufficiency and preparedness and an affinity for wilderness and exploring back-country areas.

Dirt jump/ pump track riding

This discipline borrows heavily from BMX and could equally be considered as a non-competitive discipline of BMX – indeed dirt jumps and pump tracks can be ridden on BMX or mountain bikes. This discipline tends to appeal strongly to younger people and has strong urban focus. Dirt jumps and pump tracks are both highly modified track types, entirely constructed from dirt/soil/aggregate. Dirt jumps are large mounded jumps built up above the natural ground surface. The jumps often feature a gap between the take-off and landing points. Pump tracks are short circuit tracks, featuring rollable dirt mounds and berms in series. They are designed to be ridden without pedalling, riders generating speed by pumping the bike – i.e. pushing the bike down into the dips and pulling the bike up over the mounds. Any mountain bike or BMX bike can be used on pump tracks, but dirt jump bikes are usually heavily built to withstand jumping, usually have front suspension only and may have fewer gears than cross-country bikes.

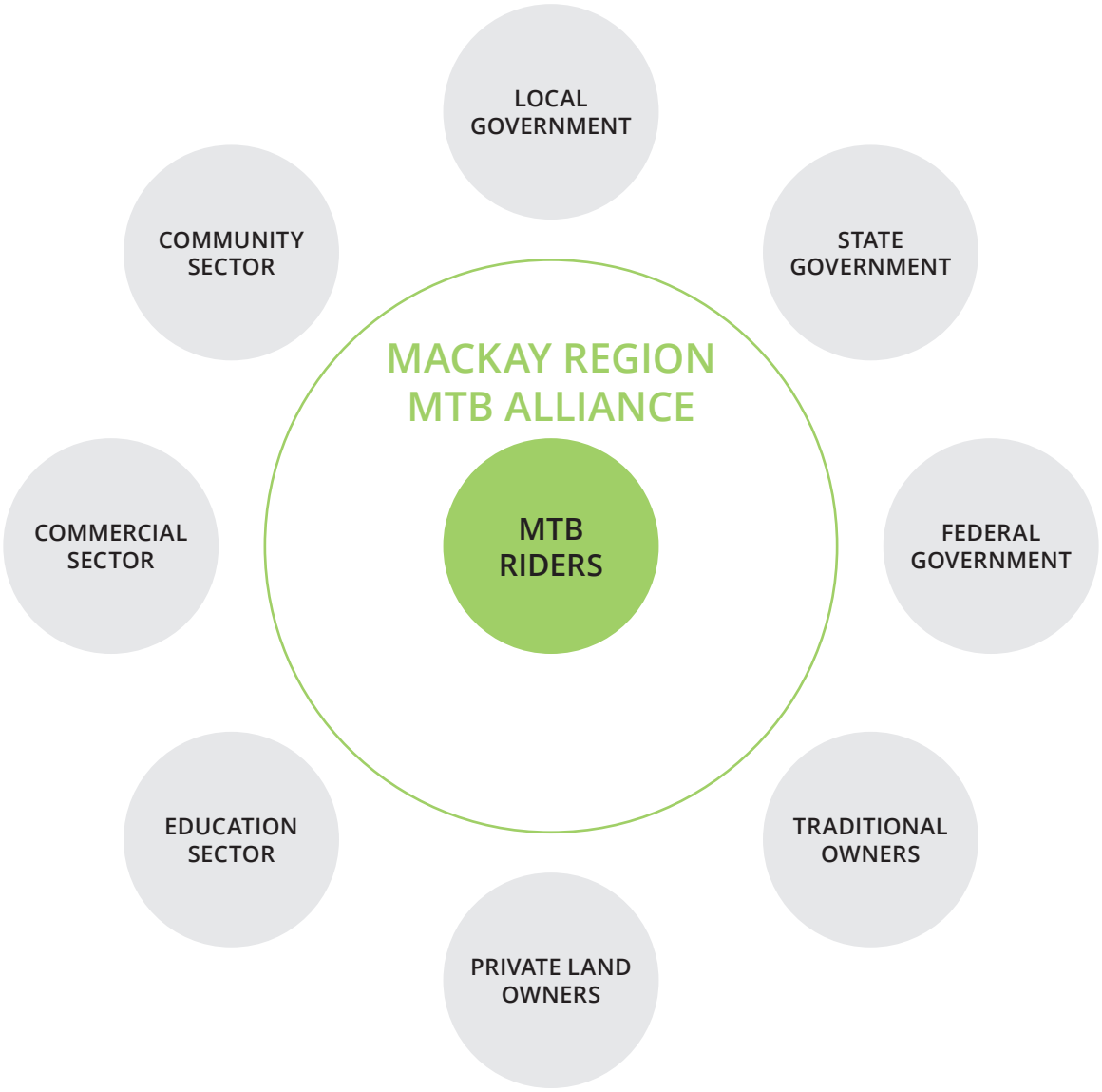
Trials

Trials is a relatively unpopular discipline that involves manoeuvring the bike over an obstacle course without putting a foot down. Courses usually combine natural and man-made features. Trials bikes look more like BMX bikes than mountain bikes, with very small low seats, small wheels, small frames and large volume tyres and do not have suspension. The primary skills required for trials are balance and the ability to 'hop' the bike up onto obstacles that are too large or steep to be able to pedal or roll onto. Trials courses typically don't require much space and are great for spectators, but the sport itself is not very popular.

APPENDIX 2: DRAFT STAKEHOLDER MAP

This draft stakeholder map is intended as a starting point to ensure all stakeholders for the Mackay region's mountain biking market are identified and their role in the market is determined. This stakeholder map should be a living document, reviewed by the Mackay Region Mountain Biking Alliance early in its inception, and updated as new stakeholder opportunities are identified.

It is suggested that this stakeholder map should support a recommended Partnership Strategy to embark on a program of partnership and collaboration to leverage support, investment and action across a range of stakeholders for the benefit of the region's mountain biking market.



Stakeholder Group	Stakeholders	Roles
Local government	Mackay Regional Council « Councillors « Economic development « Sport & Recreation « Community developmen	« Lead agency « Strategy « Advocacy « Advisory « Facilitation « Collaboration & partnering « Resourcing
	Whitsunday Shire Council	« Collaboration & partnering
	Isaac Shire Council	« Collaboration & partnering
State government	Department of Housing and Public Works (Sport and Recreation)	« Advisory « Collaboration & partnering « Resourcing
	Department of Environment and Science (Queensland Parks and Wildlife Service)	« Advocacy « Advisory « Facilitation « Collaboration & partnering « Resourcing
	Department of Innovation, Tourism Industry and the Commonwealth Games (Tourism Events Queensland)	« Strategy « Advocacy « Advisory « Facilitation « Collaboration & partnering « Resourcing
	Department of Health	« Strategy « Advocacy « Advisory « Collaboration & partnering « Resourcing
Federal government	Regional Development Australia	« Resourcing
Community sector	Mackay and District Mountain Bike Club	« Strategy « Advocacy « Advisory « Facilitation « Collaboration & partnering « Resourcing
	MTBA	« Advocacy « Advisory « Facilitation « Collaboration & partnering
	QORF	« Advocacy « Advisory « Facilitation « Collaboration & partnering
	Volunteers	« Advocacy « Advisory « Facilitation « Resourcing
Traditional owners	Yuwibara	« Advisory « Facilitation « Collaboration & Partnering
	Wiri	« Advisory « Facilitation « Collaboration & Partnering

Stakeholder Group	Stakeholders	Roles
Private land owners	Various	« Collaboration & Partnering
Education sector	Schools (including Mackay Christian College)	« Advocacy « Advisory « Facilitation « Collaboration & partnering
	Universities	« Advocacy « Facilitation « Research « Collaboration & partnering
Commercial sector	Mackay Tourism	« Strategy « Advocacy « Advisory « Facilitation « Collaboration & partnering « Resourcing
	Bike shops	« Advocacy « Advisory « Facilitation « Collaboration & partnering « Resourcing
	Bike event and tuition operators	« Strategy « Advocacy « Advisory « Facilitation « Collaboration & partnering « Resourcing
	Tourism operators	« Advocacy « Advisory « Facilitation « Collaboration & partnering « Resourcing
	Accommodation providers	« Advocacy « Advisory « Facilitation « Collaboration & partnering « Resourcing
	Hospitality providers	« Advocacy « Advisory « Facilitation « Collaboration & partnering « Resourcing
	Transportation providers	« Advocacy « Advisory « Facilitation « Collaboration & partnering « Resourcing
	Health professionals	« Advocacy « Advisory « Facilitation « Collaboration & partnering « Resourcing



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