Wielangta Forest Mountain Bike Trail

Business Case

July 2025

SORELL COUNCIL
1862

This Business Case for the Wielangta Forest Mountain Bike Trails was prepared by TRC Tourism as next stage in the consideration for developing the Wielangta Forest Mountain Bike Trail in Southeast Tasmania.

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ACKNOWLEDGEMENT OF COUNTRY

We acknowledge the Indigenous peoples of the lands, waters and communities we work together with. We pay our respects to their cultures; and to their Elders – past, present and emerging.

IMAGE CREDIT

South East Mountain Bike Association

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ACRONYMS

Name	Abbreviation
South East Region Development Association	SERDA
Wielangta Forest Mountain Bike Trail	WFMBT
ERA	ERA
South East Mountain Bike Association	SEMBA
Tasmanian Parks and Wildlife Service	TPWS
Local Government Authority	LGA

Contents

Executive Summary

The proposal

This business case has been prepared for Sorell Council on behalf of the South East Region Development Association (SERDA). The case considers a proposal to construct and operate a mountain bike trail and potentially a walking track between Kellevie and Orford, located in southeast Tasmania.

The 70km proposed trail traverses the Wielangta Forest reasonably close to the Wielangta Forest Road. The proposal is outlined in the 2023 Strategic Plan[1] undertaken by GHD for SERDA.

The trail offers a chance to enhance mountain bike tourism in Tasmania and Australia with a point-to-point experience. It can be enjoyed over a weekend, either serviced or independently, or through day and short trips using access trails from the Wielangta Forest Road.

The Timber Trail in New Zealand is the closest model to the proposed trail and provides a strong case study for this experience.

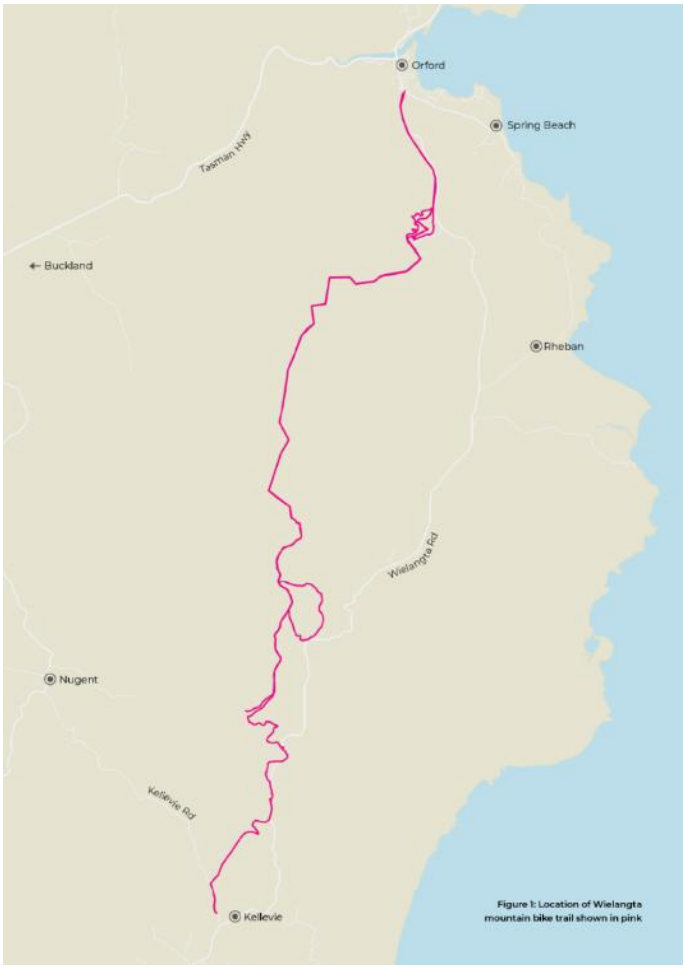
Land tenure is complex and the trail, which seeks to utilise existing old trails, forest roads and tracks and other infrastructure, crosses several land tenures and private land blocks. Obtaining the necessary approvals from all relevant landowners and managers will require significant time and the adoption of appropriate risk management measures. The business case addresses this issue and proposes a suitable governance regime.

Governance

The proposed governance model is a two stage model. Stage one involves both Sorell and Glamorgan Spring Bay Councils establishing a MOU to cooperate on the development of the trail. Sorell Council would, subject to the adoption of the business case and plan, become the proponent. The Council would be supported by a project control group (PCG) or working group that contained a range of partners and stakeholders in the trail's development and ultimately operation.

Stage 2 forms a company limited by guarantee as a special purpose company to run the trail. Both Sorell and Glamorgan Spring Bay Councils would be shareholders. It is likely the constitution would be established to include a Board of Management containing the appropriate skills and representatives to operate the trail and experience.

Figure 1. Proposed Route of the Wielangta Forest Mountain Bike Trail



Source: ERA and SEMBA. June 2025

[1] Southeast Tasmania Mountain Bike Strategic Plan – Factors for success of mountain bike recreation. SERDA 2023. GHD.

Environment and planning

ERA Planning has undertaken the environmental and planning assessment component of the business case for TRC Tourism. The trail is classified as Passive Recreation, pursuant to the *Tasmanian Planning Scheme.* The Proposal would pass through four different zonings (General Residential, Rural, Environmental Management and Utilities) where passive recreation is a no permit required use class in all zones. The Proposal passes through multiple land tenure types that requires various consents including consent from the Tasmanian Parks and Wildlife Service (TPWS) through the Reserve Activity Assessment process.

ERA does not anticipate any significant impediments to obtaining planning approval under the *Tasmanian Planning Scheme* subject to the sensitive micro-siting of the Proposal. The following key supporting technical reports are likely to be required to satisfy the planning scheme requirements:

- a landslip hazard report
- a natural values assessment (including an ecological survey).

Advice was sought from Aboriginal Heritage Tasmania who identified that the Proposal would require an Aboriginal Heritage Assessment.

A desktop environmental review has identified information surrounding the land, water and ecology of the proposed trail route. Based on the results of the desktop review the following environmental studies/inputs are likely to be required:

- An ecological survey of the proposed route and immediate surrounds should be undertaken for any areas where ground disturbance or other impact to native vegetation is required[2].
- If impacts within the Sandspit River Sandstone Cliffs/Caves Complex geosite are anticipated, a specialist geomorphologist should be engaged.

Economic impacts

Trail users and spending

Mountain biking is a growing activity as the community is increasingly focused on fitness and active leisure. In addition, visitors are increasingly interested in active experiences during their stay in a region. Trail users are likely to comprise of local and regional residents who live in the local government areas adjacent to and accessible to the trail and visitors from outside the region who ride the trail or segments of it.

The demand analysis estimates that Year 1 is projected to have 12,410 total users, with 7115 being local and regional users and visitors accounting for 5295 users. By year 10, total users are expected to have grown to around 24,333 (14,465 local/regional users and 9868 visitors). The growth occurs with the increased interest in mountain biking by locals/regionals and visitors and the promotion of the trail experience.

Projections of overnight stays linked to trail use have been developed to indicate the likely future demand for accommodation both along the trail and within the broader region. The trail will provide a boost to the regional accommodation sector, with new stay options likely to emerge to service this demand.

Spending in the region by trail users is modelled and estimated.

- Visitors are expected to spend approximately $1.466 million in year 1, increasing to $2.538 million by year 10.
- Local and regional trail users spend at a lower rate. In year 1, these users are projected to spend $0.602 million, growing to $1.231 in year 10.
- Total spending in the region by trail users increases from $2.068 million in year 1 to $3.769 million in year 10.

Construction phase

Construction impacts for trail are analysed. During the construction period for the trail: Overall 15.8 FTE jobs would be generated (12.2 FTE direct jobs and 3.6 FTE indirect jobs). Of the 12.2 direct jobs, 8.7 are in onsite construction, 2.0 are in materials supply, and 1.4 in design and project management.

[2] The need for environmental permits and approvals are dependent on the outcomes of the ecology survey

During the trail construction period a total of $1.766 million in regional income would be generated ($1.542 million direct income and $0.224 million indirect). [3]

Operations – Wielangta Forest Mountain Bike Trail

Trail users and their spending in the region will have a major impact and generate an increase in jobs and regional income.

The analysis shows the total jobs (direct and indirect) generated in the region by the operations of the trail. The number of jobs increase as the trail is promoted and recognised, and businesses servicing the trail expand and develop (e.g. bike hire, accommodation).

Total jobs increase from 11.2 FTE in year 1 to 20.5 FTE jobs in year 10. These comprise direct jobs servicing trail users (7.9 year 1 & 14.3 in year 10) and indirect jobs (3.4 year 1 & 6.1 in year 10).[4]

Regional income (in $2025 prices) increases from $0.988 million in year 1 to $1.800 million in year 10. Total income over the 10 year period is $14.027 million. Regional income includes wages, salaries, and profits. Direct income is that generated in the businesses directly servicing the trail users. Indirect income is that in businesses servicing consumer needs of the direct employees.

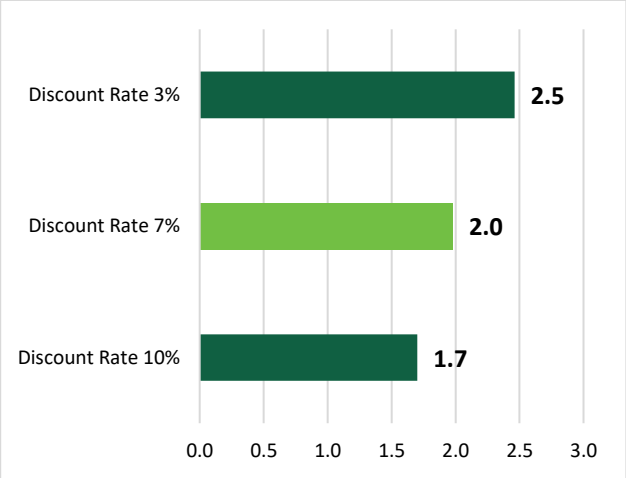
Benefit cost analysis

A cost benefit analysis was conducted for the project.

- **Benefits of the trail** comprise: the increase in regional income; health benefits – the reduction in health costs associated with exercise (trail rides/walking); the valuation of the trail experiences, based on a shadow price (per trail user) as there are no user charges for the trail; and the improvement in productivity (for persons in employment) associated with exercise on the trail.
- These benefits total $22.031 million over this period: regional income ($14.027 million); health benefits ($4.147 million); user valuation ($3.142 million); and productivity benefits ($0.715 million).
- **Costs:** project costs comprise $5.0 million in development and construction costs and maintenance and operational costs (over 10 years) of $2.5 million.
- The benefits of the trail are compared with the capital costs for the new trail development. Benefits are discounted by 3 discount rates (3%, 7%,10%).[5]
- **Benefit Cost Ratio:** The project yields a benefit cost ratio (BCR) of 2.5 for a 3% discount rate, a BCR of 2.0 for a 7% discount rate and 1.7 for a 10% discount rate. Benefit cost ratios compare the aggregated discounted benefits over 10 years with the total project costs over this period.

A BCR above 1 indicates that benefits exceed project costs. For the 7% discount rate every dollar spent on the trail (over 10 years) delivers a benefit of two dollars.

Figure 2. Benefit cost ratio – Wielangta Forest Mountain Bike Trail



Source: MCa Modelling & Analysis, June 2025

Other matters

This business case outlines the risks attached to the proposal that can be foreseen at this stage and provides some mitigation strategies. It also provides a simple pathway forward for the Council's – subject to their adoption and endorsement of the business case.

The proposal has many benefits and will require some careful and detailed planning to progress, including aligning stakeholders and land managers behind the vision.

[3] This assumes the construction workforce would come from the region and adjacent areas.
4 These indirect jobs are in local businesses supplying inputs to direct servicing businesses and businesses supplying goods and services to the direct employees.

5 These discount rates are those required by state governments and the Australian Government for business cases and cost benefit assessments. Discounting means a present value can be calculated for the future benefits over the 10 year period and these values are aggregated for a comparison with the project costs.

1 Introduction and context

1.1 Background and intent

The Wielangta Forest Mountain Bike (MTB) Trail Project is a long-term initiative aiming to create a network of MTB trails connecting Kellevie and Orford on Tasmania's East Coast. The project is a partnership between Sorell Council, the South East Region Development Association (SERDA) and South East Mountain Bike Association (SEMBA).

The proposal has been developed by mountain bike enthusiasts and industry members with several objectives in mind – notably to develop a world class series of connected trails that provide wilderness riding through the forests of SE Tasmania, connecting Kellevie and Orford. The region is also close to the Wielangta Forest Road.

The project seeks to repurpose disused forestry tracks, transforming them into world-class mountain biking trails that will drive tourism and promote outdoor recreation in the region.

An initial feasibility study has been conducted and its findings are included in the South East Tasmania Mountain Bike Strategic Plan document 2023[6]. The plan details factors for success of trail development of the proposed Wielangta Trail Project.

The strategic development of a series of trails in Southeast Tasmania has in part been undertaken with a view to deliver significant economic and social benefits to the region – and particularly the local government areas of Sorell and Glamorgan Spring Bay.

The development of this trail is also part of a proposed project to complete a cycling circuit of Tasmania using and linking up existing trails.[7]

The 2023 Strategic Plan[8], developed by GHD for SERDA outlines a number of benefits and costs of the proposal.

The plan outlines the vision and principles for the proposal and aligns the proposal to a series of current Federal, State and Local strategies and policies.

The plan identifies markets for the proposed trails and provides some commentary on the demographics of the region. The plan provides a cost benefit analysis for the proposed trails.

This business case provides an update on the GHD work. Further, it provides a detailed governance section, provides insights into revenue raising and costs of running the trail, and contains a detailed assessment of the regulatory pathway and environmental considerations required.

This report has been developed with the support of the land managers and land owners along the proposed route. All have been helpful in the provision of comments on their concerns and their aspirations for the trails and these are included in this report.

Figure 3 below shows the intended route of the proposed Wielangta Forest MTB Trail. While Figure 4 shows the intended circuit for the Tasmanian Mountain Tourism.

Figure 3. Proposed route of the Wielangta Forest Mountain Bike Trail[9]

[6] GHD 2023, South East Tasmania Mountain Bike Strategic Plan - Factors for success of mountain bike recreation

[7] W. Chapman and D. Giblin for SERDA; South East Tasmanian Mountain Bike Proposal Development Plan

[8] GHD 2023 Southeast Tasmania Mountain Bike Strategic Plan. Factors for Success of Mountain Bike Recreation. SERDA 21 April 2023

[9] Source: Southeast Tasmania Mountain Bike Strategic Plan. GHD for SERDA.

Figure 4. **Tasmanian overview of the proposed Mountain Bike network in Tasmania**

1.2 Location and proposed route of main trail

The proposed trail is located approximately 80km from Hobart and the international airport, and near other renowned tourism destinations such as Maria Island, Freycinet National Park and Port Arthur Historic Site. The area for the project is approximately 150 hectares (Ha) and is located off Wielangta Road -approximately 13km from Orford and 15km from Kellevie.

The project involves development of around 70km of trails in the Wielangta State Forest - linking the towns of Kellevie and Orford with access loops (road verge access trails) at both ends. The main trail will be a point to point trail from Kellevie to Orford, with some additional loops and side trails included in the package. The trails will traverse the Wielangta Forest through various forest ecologies, utilising access lines established over 100 years of historical milling operations in the area.

The project concept envisages development of a primary trail as a potential access link to provide opportunities for development of trail and visitor facilities on adjoining private properties along the route. The intent is to develop the primary trail as an adventure style trail open to a broad range of rider skill levels.

Figure 5. Google Earth overlay of the proposed trail

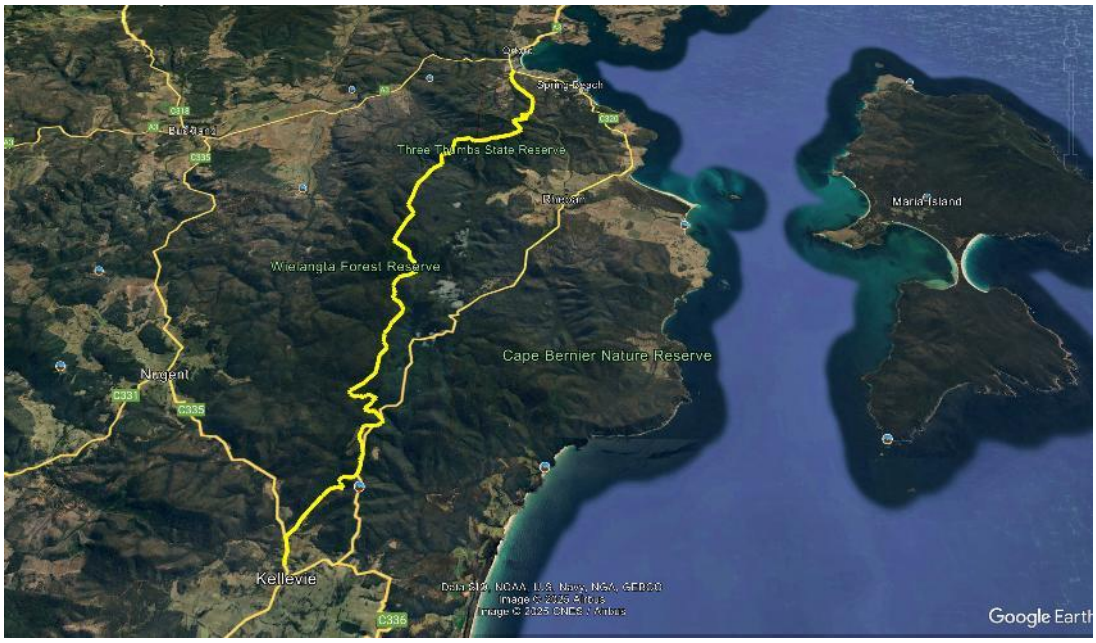
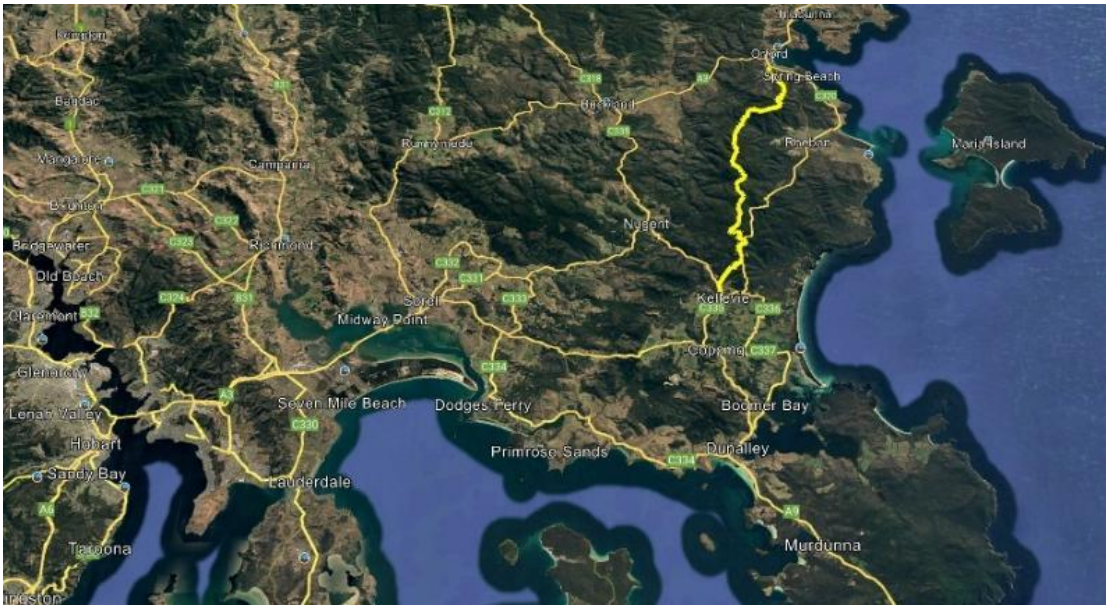


Image source: Google earth



1.3 Objectives

The objectives of the trail project as described in the 2023 GHD report are to:

- **Increase visitation** for cycling tourists by contributing to a diverse range of state-wide cycling experiences.
- **Stimulate the economy** for the Southeast and Eastern regions of Tasmania.
- **Provide recreational infrastructure** and activity for visitors and local communities.
- **Protect and enhance** the natural, cultural, and historic values of the area**.**

These objectives are still considered sound and are not revisited in this business case and update.

The objectives of this business case are to outline the trail's financial viability, environmental sustainability, and socio-economic benefits, ultimately enabling the securement of funding and providing the necessary roadmap to make the Wielangta Forest MTB Trail a reality.

1.4 Economic profile

Resident population[10]

Based on the 2021 census, there were 557,571 residents in Tasmania; 41,734 residents in the South East region; 247,086 in the Greater Hobart region[11]; 16,734 in the Sorell Council area; 5,012 in the Glamorgan Spring Bay Council area and 2,593 in the Tasman Council area.

The population of Tasmania is projected to increase from an estimated current population of 573 156 persons in 2023 to 641,045 persons in 2053, with an aging population trend. The populations of the Council areas included above are all expected to increase.[12]

Tourism as an industry

Headline Gross Regional product for the SERDA region (Sorell Council, Glamorgan Spring Bay Council and Tasman Council) has been steadily growing at a rate of 3.0% p.a. Tourism has been identified as a key growth sector in the SERDA region with strong growth over the past five years. Major investment is occurring in the precinct starting with airport runway strengthening. The case to advance the development of the Wielangta MTB Project has been identified as high priority.[13]

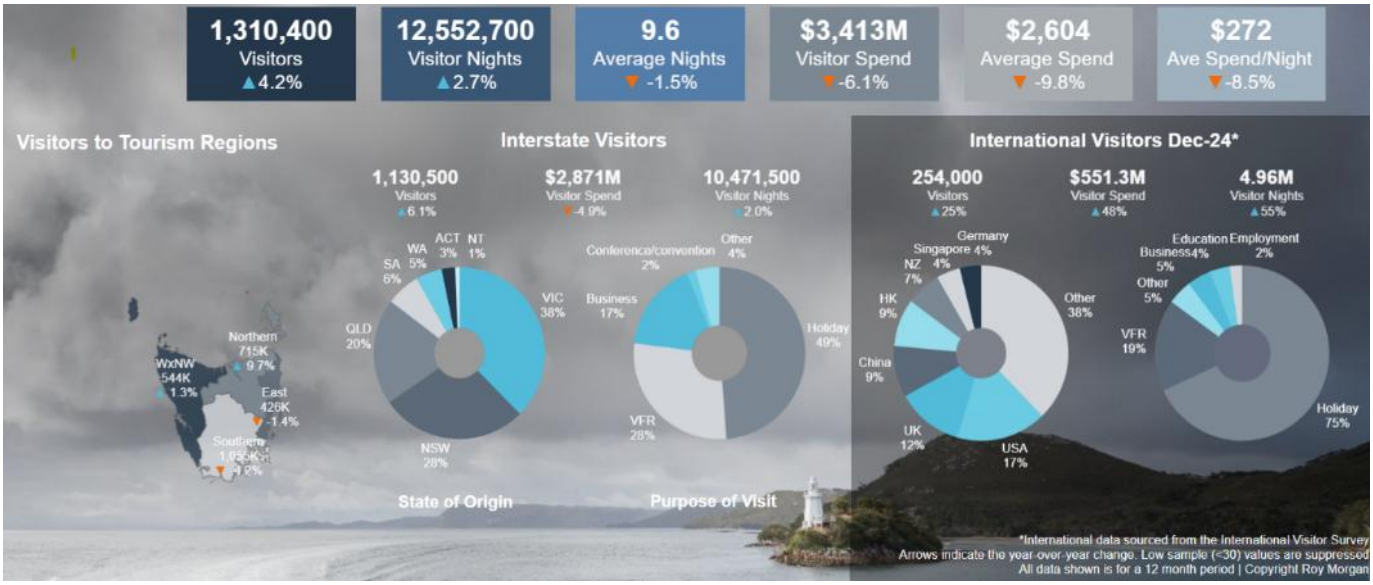
[10] Australian Bureau of Statistics Census 2021
[11] N.b. categories are not mutually exclusive – indicating proximity of population to trail
[12] https://www.treasury.tas.gov.au/economy/population-projections
[13] South East Region Development Association (SERDA) Infrastructure Strategy October 2024

1.5 Tourism and mountain biking demand

Tasmania is a key destination for outdoor nature-based tourism and recreation, with mountain biking in particular a fast-growing recreational activity in the state.

A snapshot of tourism in Tasmania

Figure 6. Snapshot of Tasmania's tourism performance[14]



- Tasmania received 1,310,400 visitors in the year ending December 2024, 254,000 international and 1,130,500 interstate visitors[15]
- Key markets are Victoria, New South Wales, and Queensland followed by international visitors
- The total spend across all interstate & international visitors was $3.413m – down 6.1% on the previous year
- The average spend per trip was $2,604, and $272 per night
- Interstate visitors have a higher proportion of visiting friends and relatives (VFR) than international visitors
- Average nights stayed was 9.6
- Outdoor experiences that showcase the wild places and wide-open spaces of the state are a central part of Tourism Tasmania's positioning.
- The main activities visitors participate in are outdoors based, including bushwalking, visiting historic sites, visiting national parks, mountain biking and going on day trips
- The 2030 outlook for Tasmania's visitor economy signals continued growth in visitors and associated expenditure, along with growth in travel by Tasmanians around the state and the spend benefit this provides
- By 2030, Tasmania is expected to welcome 1.6 million interstate visitors and 400,000 international visitors.[16]

[14] Source: Tasmanian TVS Analyser – tvsanalyser.com.au

[15] Tourism Tasmanian Visitor Survey December 2024

[16] Tasmanian Government and Tourism Industry Council Tasmania, 2030 VISITOR ECONOMY STRATEGY TASMANIA

Regional Tasmania – Hobart and the East Coast[17]

- Hobart and Surrounds received 1,055,000 visitors in the year to December 2024
- East Coast region received 426,000 visitors, of which 326,000 stayed overnight in the year to December 2024
- More than 370,000 tourists are estimated to travel through Sorell on their way to the east coast, the World Heritage Site of Port Arthur and Hobart each year[18]
- Key visitor activities near Sorell include historic buildings, fruit farms, southern beaches, Pittwater – Orielton Lagoon (a wetland of international significance/Ramsar site), whale watching at Spectacle Head - forming part of the Whale Trail along Tasmania's East Coast, and the Wielangta forest drive and walk[19]
- Orford marks the southern starting point of the Great Eastern Drive, one of Australia's greatest road journeys and located at the mouth of the Prosser River – a classic Tasmanian fishing town[20]
- Key visitor attractions near Glamorgan Spring Bay include the Maria Island National Park and multi-day walk
- There are 10 properties listed on Discover Tasmania located near to Orford and Twamley road, in addition to a number of smaller Bed and Breakfast operators.

Existing trails and trail events in Tasmania

Tasmania is Australia's undisputed mountain biking lead State. Some of the better known and popular **mountain bike trails and parks** are as follows:

- Blue Derby Network
- Hollybank Mountain Bike Park
- Maria Island National Park
- North-south Track, Mount Wellington
- Penguin MTB Park and Dial Range
- Wild West MTB Trails
- Maydena Bike Park
- Mt Owen
- Silver City
- Wild Mersey.

Aside from Maydena Bike Park most mountain bike trails and parks have been developed and are managed by Councils on primarily public land with small areas of private land included in some networks. They are also all free to access. Most have been funded through a combination of Council contribution, State funding with a strong majority of Federal grant funding.[21]

A full list of mountain bike tracks as of 2023 are contained in the Southeast Tasmania Mountain Bike Strategic Plan.

A range of mountain bike events already takes place in Tasmania. These are similarly described in the 2023 strategic plan. Of note is the existence of events using the Kellevie and Wielangta area.

Mountain biking participation

MOUNTAIN BIKE TRAIL DEMAND AND TRENDS

Mountain biking is recognised as one of the fastest growing recreational and tourism activities in the world. More people seek ways to reconnect with nature, prioritise their health, and enjoy recreational activities with friends and family.

Electric bikes (e-bikes) have rapidly emerged as a popular option for many users and are causing significant changes to the mountain biking landscape. E-bikes are improving the accessibility of mountain biking, with all ages participating and leisure cyclists being able to explore longer distances and more challenging terrains.

MOUNTAIN BIKING PARTICIPATION – AUSTRALIA

Some estimates on national mountain bike participation suggest that approaching one million Australians engage in some form of mountain biking activity, ranging from beginner through to competition level.[22]

In terms of growth, the AusPlay[23] report indicates that mountain biking has a market opportunity to grow considerably. Key findings include:

- 327,000 Australian adults (1.6% of the population) and 12,600 children participated in mountain biking during the year

[17] Tourism Tasmanian Visitor Survey September 2024
[18] https://www.sorell.tas.gov.au/visitor-information/
[19] https://www.sorell.tas.gov.au/visitor-information/
[20] https://eastcoasttasmania.com/discover
[21] Mountain Bike Tourism Action Plan, 2024, Robert Potter for the Mountain Bike Network – Tasmania
February 2024
[22] Warburton Mountain Bike Destination 2019 – Instinct and Reason
[23] Ausplay National Sports and Physical Activity survey, aggregate June 2015- June 2023

- 41% of participants undertake mountain biking at least once per week
- 24% of Australian mountain bikers ride for three hours or more on average
- 21.6% of mountain biking participation was organised (e.g. through a club)
- High skew towards males aged 35-54, and higher income
- Nationally, NSW (31.4%), Victoria (21.8%) and Queensland (21.4%) have the highest percentage share of mountain bikers. Comparatively the Northern Territory has 1.7% participation
- Top reasons to participate in mountain biking are for fun, enjoyment, and physical health and fitness.

Other data on actual participation in mountain biking in Australia is from Mountain Bike Australia's (MTBA) statistics; *Mountain Biking in Australia - An Economic and Participation Analysis* (AusCycling 2021); and research undertaken by Instinct and Reason on behalf of the Yarra Ranges Council for the Warburton MTB Trail Hub project in Victoria.

Demand for cycling products and experiences has grown at an unprecedented rate, with the global cycling market set to increase from $130 billion to $200 billion in 2027. As a key market segment, mountain bikes are expected to drive a significant portion of this growth, reflecting the strong demand for mountain biking activities.

The 2021 AusCycling report found that mountain biking participants spend between $136.9 and $630.8 million annually in Australia simply riding on local trails. This expenditure provides significant support to retail, accommodation and food, professional, scientific and technical services industries.

In addition to this local expenditure, mountain bikers also contribute significantly to the Australian tourism industry and broader visitor economy through regular travel to mountain biking destinations. Approximately 40% of riders went on a bike-specific interstate holiday in the past 12 months, averaging a spend of $2,485.75 per trip and travelling 1-2 times per year. Approximately 65% of riders went on 1-3 intrastate holidays in the past 12 months with an average spend of $1,707.95 per trip.

PLANNING TO RIDE: 32% of the adult Australian population has incorporated or considered a mountain bike experience in a holiday. Of this, 82% have specifically added an MTB experience into their holiday. [24]

This data is particularly important for the style of product and experience being considered for the Wielangta Forest MTB trail.

MOUNTAIN BIKING PARTICIPATION –TASMANIA[25]

Approximately 29,986 visitors to Tasmania participated in mountain biking (2% of all visitors) but accounted for 4%of visitor nights (521,829).

The highest proportion of mountain biking visitors visit Hobart and surrounds.

They are more likely to be families with older children or couples with no children, in the 45-54 age group, and have a household income of $150,000 or more.

In terms of local riders, Tasmania has the highest participation rate of all Australian states at 3.4% or 14,959 adults (over 15).[26]

Benefits of mountain biking[27]

Mountain biking can deliver environmental, social, health and economic benefits to individuals and communities. There are numerous opportunities to leverage these benefits for the broader community including:

- Environmental benefits, through contributions to conservation efforts and preservation of natural areas, and providing access to open space for communities to enjoy and nurture
- Social and health benefits, through improved physical and mental health, increased community cohesion and connection and volunteer opportunities
- Economic benefits, through increased tourism and spend in local communities with mountain bike trails (e.g. spend on bike hire, shuttle services and at local food and beverage outlets).

[24] Warburton Mountain Bike Destination 2019 – Instinct and Reason

[25] Tourism Tasmanian Visitor Survey September 2024

[26] Ausplay National Sports and Physical Activity survey, aggregate June 2015- June 2023

[27] Mountain Biking in Australia: An Economic and Participation Analysis AusCycling, March 2021

Economic contribution of mountain bike riders

In terms of mountain bikers' economic contributions, approximately two-thirds of respondents in the Auscycling survey[28] went on a mountain bike specific intrastate holiday in the 12 months preceding.

Typically, people who went on intrastate holidays for the primary reason of mountain biking spent $1,707.95 per trip with accommodation being the largest expenditure item at $525.70 per trip, followed by meals and beverages at $510.90 and ground transport at $279.20 per trip.[29]

Table 1. Intrastate mountain bike holiday expenditure

Average intrastate mountain bike holiday	Total Rider Spend $
Airfares	119.60
Ground transport	279.20
Meals and beverages	510.90
Accommodation	525.70
Retail purchases	154.50
Bike rental	22.55
Equipment and spare parts	95.50
TOTAL AVERAGE EXPENDITURE	1,707.95

Approximately 40% of respondents went on a mountain bike specific interstate holiday in the preceding 12 months, spending on average $2,485.75 per trip. Tasmania is typically the most popular location for an interstate mountain bike holiday within Australia.

The added health and wellbeing contributions of mountain biking can be estimated and quantified as per the table 2.

Table 2. Social values of mountain biking, annually and per ride[30]

Social benefit	Overview of benefit	Estimated annual benefit	Estimated benefit per ride
Health benefits	The personal and health system benefits due to healthier and active individuals		$1.58 per km ridden
Productivity benefit	Improved workplace productivity through decreased absenteeism and presentation	$767	$7.59 per ride
Human capital benefit	Positive association between sport and recreation and educational outcomes	$252	$2.50 per ride
Consumer surplus	The satisfaction people derive from participating in sport and active recreation	$2,624	$25.98 per ride
Criminal and social justice benefit	Benefits from decreased crime rates due to increased engagement from sport and recreation	$79	$0.78 per ride
Civic/volunteering benefit	The value people place on volunteering and enjoying sport and recreation activities	$3,214 per volunteer	-

Source: GHD 2021, Southeast Tasmania Mountain Bike Strategic Plan - Factors for success of mountain bike recreation

[28] Mountain Biking in Australia: An Economic and Participation Analysis AusCycling, March 2021

[29] GHD 2021, Southeast Tasmania Mountain Bike Strategic Plan - Factors for success of mountain bike recreation

[30] GHD 2021, Southeast Tasmania Mountain Bike Strategic Plan - Factors for success of mountain bike recreation

Mountain bike trail case studies

A series of case studies on mountain bike destinations and trails are presented in Appendix A.

Included are:

BLUE DERBY

Australia's mountain bike success story showcasing the small rural town of Derby and its revitalisation due to mountain bike tourism.

Key Points

- Economic Revisitation – bike trails has significantly boosted local and regional economy Trail Network and Events solidifying its reputation as an international MTB destination
- Operational Management transition - Dorset Council transferred operations of Blue Derby to the Foundation, while the Council retains responsibility for trail construction and maintenance
- The Blue Derby Foundation is an independent charity focused on supporting local community development, raising funds for trail maintenance.

MYSTIC PARK, BRIGHT

The case study that highlights the commercial reform of mountain biking in Australia with a pay to ride and pay to shuttle business model.

Key Points

- Community NFP was not financially sustainable
- Rider contributions and events are core revenues
- Economic Impact value to local economy.

THE TIMBER TRAIL – NEW ZEALAND.

This case study highlights the benefits of mountain bike touring and the business model that could be applied to the proposed Wielangta Forest mountain bike trails.

This model is an ideal fit for the Wielangta Forest Mountain Bike Trail. It is a point to point ride that offers riders outstanding forest experiences, with the option of accommodation in the middle of the trail.

The lessons learned from the Timber Trail development include ensuring:

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

2 The Concept

2.1 A Trail through the heart of Tasmania's stunning East Coast forests

This business case assesses the potential to develop a trail through the East Coast of Tasmania from Kellevie to Orford.

The figure below shows the intended routes of the trail(s) as they are located close to and west of the Wielangta Forest Road.

The intent is to develop the trail with some supporting loops as a touring route with an adventure style trail open to a broad range of rider skill levels and market segments. The rise of e-bikes in the market place supports this concept.

The spine trail will be approximately 70km in length – making it a perfect 2 day ride for the beginner to intermediate markets, and allowing for stops, interpretation and storytelling on the history of the working forest, the environment and Tasmanian Aboriginal living culture (subject to free and informed consent of the Tasmanian Aboriginal Centre representing the Tasmanian Aboriginal People).

The trail can be ridden in either direction, or for the purpose of a route description, the route is described from south to north.

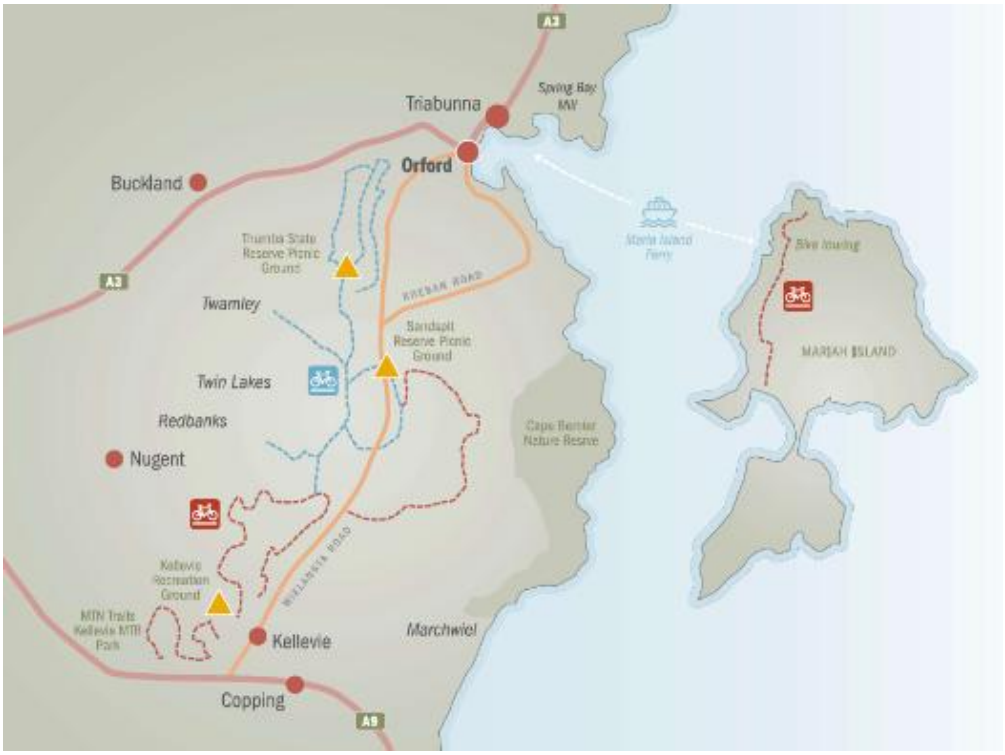
2.2 Route description

The proposed trail head for the southern end of the trail and route is the Kellevie Recreation Reserve, a small reserve that is both ideally located and has existing facilities that can be utilised including a public toilet and water.

The reserve provides easy access to the start of the trail, and also provides parking and access to the private mountain bike trails located west of Kellevie.

Heading north, the trail passes through forested country that was once used for timber production, and in some areas is still likely to be a working forest in the future.

Figure 7. General location map for the proposed Wielangta Forest MTB Trail[31]



[31] South East Tasmania Mountain Bike Strategic Plan. Factors for Success of Mountain Bike Recreation. GHD for SERDA 2023

Figure 8. Proposed trail southern route

Source: SEMBA 2025

The trail is proposed to utilise some of the existing old forest roads, snig tracks and log haulage tracks, and then utilise some of the existing Hellfire Cup trail event network that also currently exists.

The routes proposed are generally for mountain bike use, but some sections will lend themselves to walkers and cyclists sharing the trail.

Figure 9. Kellevie Recreation Reserve oroposed southern trail head

Source: TRC Tourism / Chris Rose

Figure 10. Kellevie Recreation Reserve existing facilities

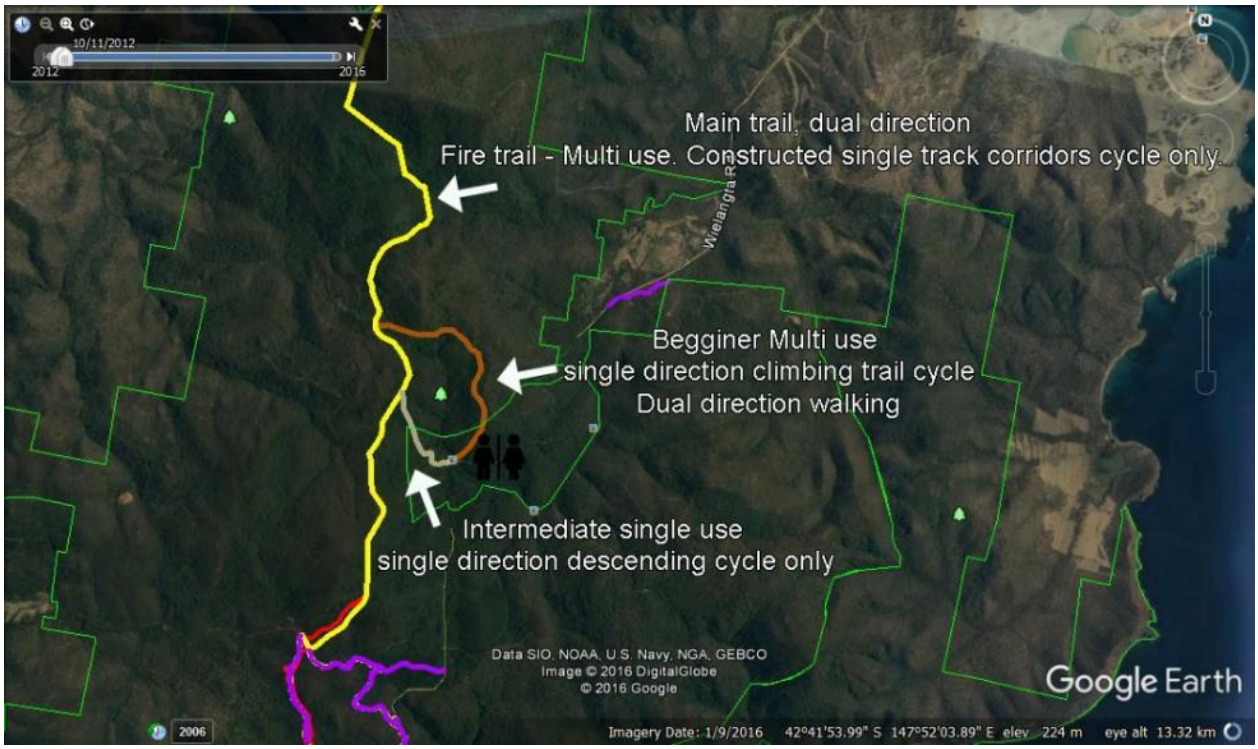
Source: TRC Tourism / Chris Rose 2025

The middle section of the trail includes a loop through the Sandspit Nature Reserve and is proposed to utilise the existing car park and toilet facilities that are managed by the TPWS.

For the most part, where existing fire trails and other pre formed roads and trails are utilised, they can be multi directional and shared with walkers. Where specific sections of trail are constructed as single track – then they will generally be for mountain biking only.

The trail passes through a variety of forest types and will include some older tramway sections and tall forests. Where the trail traverses ridge tops, spectacular views over Mercury Passage and Maria Island frame the horizon to the east.

Figure 11. Mid-section of the proposed Wielangta MTB Trail



Source: SEMBA 2025

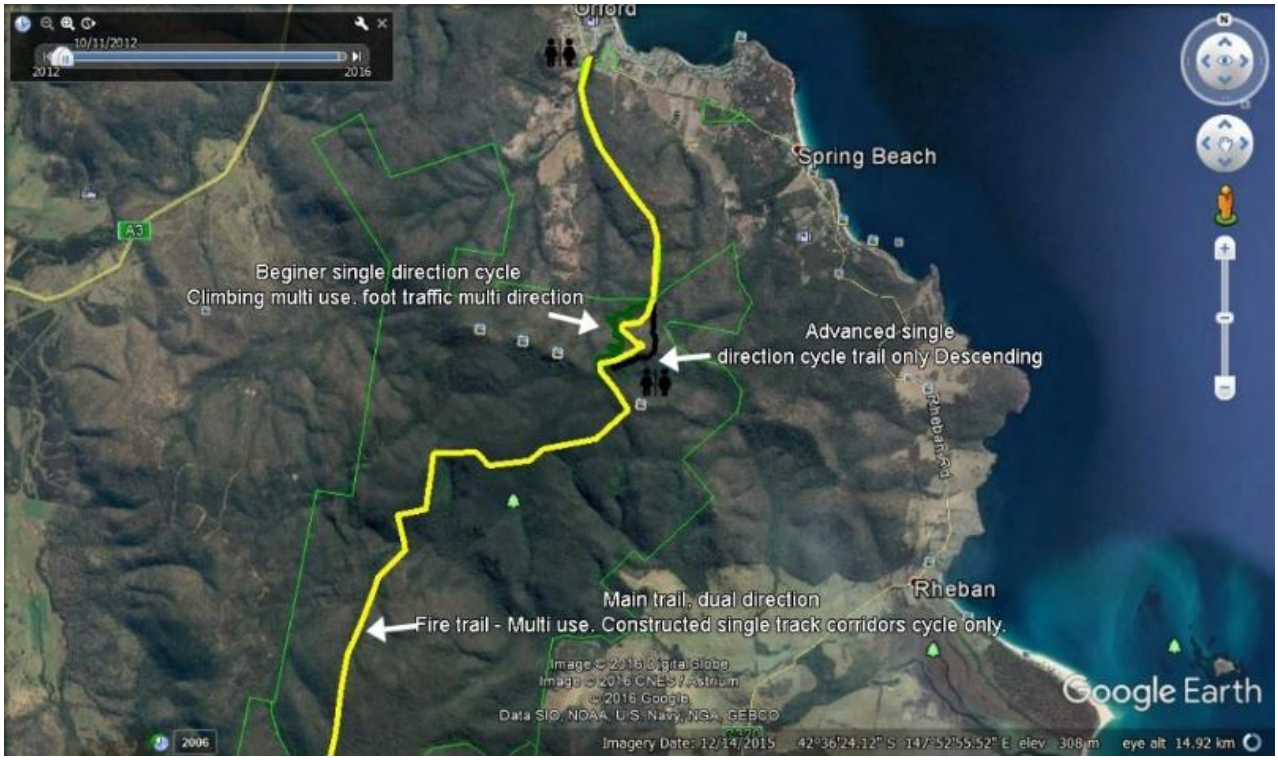
Heading north from the proposed Sandspit River reserve, the trail climbs through forest and predominantly passes through drier forest types that offer great riding environments and trail construction soils.

Approximately half way between Kellevie and Orford, the proposed accommodation areas are located off reserve and on private land.

Both Twamley Farm (to the west of the trail) and Rheban Farm (to the east of the trail) have existing accommodation facilities that could potentially be utilised for trail accommodation – most likely with some form of shuttle or trail leading to the farms. Investment is required although it is noted that Twamley Farm already has some accommodation.

As the trail heads north, it traverses the ridge top and finds its way to the Thumbs Lookout.

Figure 12. Northern section of the route – into Orford



Source: SEMBA 2025

At this point, the route can possibly have more than one trail component as it drops steeply off the ridge line. An easier route for beginners and climbing or a more difficult descending trail provide the choice of either a safer or more exciting experience.

The trail route then continues its descent into Orford and passes through a working farm and private land (with the free and informed consent of the land owner formally agreed to later in the development process).

A trail head has not been determined in Orford, but the reserve and car park on the waterfront would lend itself ideally for the purpose. It is close to facilities, shops and car parking.

The route as described is subject to further assessment and ground truthing and this will occur in the next stage of the development of the proposed trail – detailed master planning and on ground environmental assessments.

Figure 13. The Thumbs Lookout facilities

Source: TRC Tourism / Chris Rose 2025

Figure 14. Spectacular views over Rheban and Mercury Passage to Maria Island

Source: TRC Tourism / Chris Rose 2025

2.3 The trail experiences and product type

The proposed trail is designed to offer experiences to a range of different markets. The following table summarises these.

For all experiences on offer, the premise is that the trail will be well maintained and suitable for intermediate riding and higher end beginners. The trail, while it might contain some tricky sections, is not designed to be a downhill extreme mountain bike park. These are catered for in other locations in Tasmania.

Table 3. Table of market segments and the trail offering

Market	Offering
Locals and visitors day riding	• The proposed trail will be accessible from Orford, Kellevie and at various locations along the Wielangta Forest Road. • Car parking may be limited at several access points on the forest road. Some shuttling may be required as the trail is predominantly a one way ride. • Access to the trail is free of charge. • Most riders from the local municipalities including Hobart would ride for a day or a portion of day and provide their own transport to and from the trail sections being ridden. • Economic benefits accrue through transport, bike sales, maintenance and spare parts, food and beverage sales and other sources.
Two-day trail rides – independent riders	• The 70 kilometre through trail from Kellevie to Orford (or vice versa) can be ridden as a long day in summer by enthusiasts, or as a 2-day trip by free and independent travellers. • Riders can car pool and shuttle their cars from one end of the trail to the other or seek commercial services to retrieve transport located at one end of the trail. • Accommodation could be sought at one of the trail's proposed accommodation partners at Rheban Farm and Twamley Farm (assuming they chose to invest in suitable accommodation as indicated). • Otherwise, accommodation can be found in one of the many smaller boutique accommodation providers in the south and the larger motel and conference centres near Orford. • Benefits accrue as per the day riders with the added expenditure on accommodation, food and beverage.
Guided day trips	• This market is mostly aimed at visitors to Tasmania. For the most part they will hire bikes, be shuttled to and from the trail's entry and exit points (depending on where the particular ride is located) and be provided with food for the day. • Transport is included and it is most likely pick up and drop off will be from Hobart. • Other add on experiences could include Barilla Bay Oysters, wine tasting at Bream Creek of other local vineyards and other visitor experiences. • Significant economic benefits accrue from the group.
Guided overnight trips	• This market segment is most likely to be visitors to Tasmania from interstate or overseas. • It will include a range of services including bike hire (e-bikes and standard mountain bikes). • They will likely be adding this tour to a trip of Tasmania. • They seek a full service experience in a similar way to those undertaking the Three Capes Track, or the Overland Track (with the Tasmanian Walking Company). • Pick up and drop off in Hobart or surrounds. • Accommodation could be provided at one of the possible private (situated just off the trail on private property at Rheban Farm and Twamley Farm) providers. Full service accommodation would include meals, a glass of local wine, spa, fire pits and storytelling etc. • If not accommodation near the trail, shuttle services could take people into Orford or Triabunna from the Wielangta Forest Road • This market segment accrues the most economic benefits to the region from the trail.

2.4 Mountain bike market segments

Generally, there are six types of mountain bikers, and the relevance of each to the Wielangta Forest Mountain Bike Trail is outlined in the table below (as defined in the Australian Mountain Bike Trail Guidelines).[32]

Table 4. Mountain Bike segments and their relevance to the Wielangta Forest Mountain Bike Trail

Type	Description	Potential for Wielangta
Leisure	Include general cyclists of all ages and abilities and is potentially the largest market. Typically, they ride infrequently, often have limited skills and require very accessible trails. They are not members of clubs, and they are more likely to use routes closer to home or make the journey to trail facilities with amenities such as bike hire, cafes and toilets.	• Significant • Wielangta Forest will provide for easy and intermediate riders and is accessible to Hobart, Sorell, Orford and the Tasman Peninsula. • Will form a component of the interstate and overseas visitors seeking a full service riding experience.
Enthusiast	Enthusiasts are purely mountain bikers with moderate skills and variable fitness, and ride weekly. They are typically aged 29-49 and form the majority of mountain bikers. They typically do not compete in events and have limited outdoor experience. They prefer trails with good signage and seek technical but not overly challenging trails. Enthusiast mountain bikers are most likely to take short breaks.	• Strong • Local enthusiasts will provide significant visitor numbers for Wielangta. • Tasmania and interstate riders will seek out 2 days on the Wielangta trail and will most likely be independent.
Sport	Competitive mountain bike riders who compete, ride once or twice a week and members of clubs. They are willing to seek less accessible trails and are influential. They ride a variety of trails.	• Limited. • Events may form a component of the visitor numbers on Wielangta and this market is important for word of mouth and generating excitement.
Independent	Skilled outdoor enthusiasts who ride once a week and are technically proficient with good levels of fitness. Generally, they are a small market. Often involved in other outdoor activities, they are capable of planning their own rides and ride a very wide variety of trail classifications. They are adventurous and seek more remote trails.	• Small but important cohort. • Will be self-sufficient but are important in promoting the trail and spending on direct services.
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 required purpose built trails, which are repeatedly used in a concentrated manner. Gravity riders seek specific trails with the highest classification.	• Small and not relevant to this trail unless during specific events.

[32] Mountain Biking in Australia: An Economic and Participation Analysis AusCycling, March 2021

3 Project vision and principles

3.1 Vision

The 2023 Southeast Mountain Bike Strategic Plan contains the vision:

The southeast region will be an exemplar mountain biking destination that supports and enhances Tasmania's established and sought after nature based tourism offer – not only be delivering exciting, diverse and quality mountain bike trails – but through bold initiatives that protect the environment, share site values, and connect with surrounding visitor attractions.

This business case sees merit in having a shorter and more succinct vision – with many of the sentiments in the 2023 version maintained but in the principles.

The proposed vision is:

The Wielangta Forest Mountain Bike Trail is recognised as Australia's pre-eminent mountain bike touring trail that is sought out by visitors and residents alike.

3.2 Project principles

A range of principles support the development of the trail. The proposed principles below build on and are adapted from those contained in the 2023 GHD report.[33]

Provide positive community impacts

The impact of the trail must have a positive impact across the broader community.

These impacts can be expressed as:

- Increased participation in outdoor recreation
- Increased use of the forest areas including providing a greater level of community use and oversight of areas currently being used illegally for rubbish dumping and firewood cutting
- Aboriginal culture can be told and expressed in a self-determined way (note that this has not occurred as part of this business case) showcasing the living culture of the First Nations
- The history of the use of the forest by Europeans since settlement can shared
- Having a community roundtable or advisory group as part of the governance structure for the proposed trail
- Using the trail for training and other educational and employment outcomes.

Provide economic benefits to the region

The economic outcomes of the trail's construction and operation must be positive and applied broadly and regionally.

This can take the shape of:

- increased local and regional direct and indirect employment across multiple sectors
- increased regional income across the region
- maintenance funds are derived from visitor expenditure sourced from visitors external to the

[33] Southeast Tasmania Mountain Bike Strategic Plan 2023. GHD for SERDA.

region, as well as government sources (i.e. Local Government).

Strong and transparent governance

The governance of the trail needs to be clear, as simple as possible, and transparent.

This can be expressed as:

- the governance structure contains the necessary skills and experience to run the trail as a nationally important trail and experience
- the structure promotes transparent decision making and reporting to the stakeholders involved
- all trail stakeholders and land managers support the implementation of the trail's business plan (when completed)
- the governance entity is mindful of the broader impacts of the trail on the environment, on the land managers and their legal and policy obligations.

Inclusive and access

Strong relationships and support for multiple users can be seen through:

- successful relationships between users, the governance entity, the land managers and owners and the broader community
- other lawful uses and users are recognised and supported in the forests and farms around the trail
- trail design promotes a range of users including some all abilities trail sections
- the trail operates for the benefit of the broader community and recognises that it will contain local users, visitors and those willing to pay for a premium experience.

Sustainable and culturally appropriate

It is vital the trail is well designed, constructed and maintained so that environmental values, and cultural heritage; both First Nations and European, are protected is protected.

This can be seen through:

- all environmental legislation and policy is respected and adhered to
- culture is respected and First Nations involvement is encouraged
- all IMBA and Auscycle standards are adhered to, and the trail is promoted as part of the broader Tasmanian mountain bike network (informally at present)
- the trail is managed in a financially sustainable way
- all maintenance is undertaken as scheduled to ensure the asset is protected and the local environment is managed appropriately
- the trail seeks to improve the environment in which it passes, through greater awareness and involvement in the health of the forest by community, residents and users alike.

3.3 Success factors for Wielangta Forest Mountain Bike Trail

Successful trails offer visitors a distinct outdoors experience anchored in landscapes unique to that location. The Wielangta Forest MTB Trail will seek to implement the trail's vision through adoption of the principles and will:

- showcase the natural and cultural landscapes and/or enable users to interact with local people and heritage
- include complimentary, linked-in experiences and a choice of accommodation that adds character and variety
- offer ways for the riders to immerse themselves in the area, such as through interpretation and storytelling to enable people to learn about the place and its people
- enable and facilitate visitors from arrival to departure via supporting services and abundant information available on and off trail.

Successful multi day trails such as Wielangta Forest Mountain Bike Trail:

- are developed according to a bold vision and with a long-term view of increasing visitation
- offer an iconic, striking and variable landscape context including changes in environment, terrain and altitude with a strong line-up of natural features of interest
- are based on market demand and proven commercial viability
- offer a suite of integrated high-quality experiences suited to different markets including options for trip length, varying skill level, logistical demands and budgets
- enable visitors to make choices about the style and setting for accommodation
- are driven through effective leadership and positive attitude from an agency, investor or community and reflected through presentation and maintenance

- reflect the commitment of the partners to provide exciting, authentic and engaging experiences for visitors to enjoy
- generally involve partnerships between community, private and public sector
- leverage the positioning off existing successful destinations and attractions
- use a range of marketing techniques including social media and on-line activities to engage with visitors.

3.4 Branding

Developing a working brand for the ride that excites the market and generates interest is critical. Branding and logos can be expensive and timely, it is recommended for this project that the working title continue to be ‘Wielangta Forest Trail’ during the project planning and development phase.

If the proposal proceeds to construction and operational phases, a more market aligned name and logo could be developed.

The Timber Trail in New Zealand (see case studies) is a simple name that has generated interest due to the quality of the experience, and the nature of the trail.

4 Strategic alignment

4.1 Government and tourism strategy alignment

The project aligns with several federal, state, and local government and tourism strategies and objectives.

The Project directly aligns with the Federal Government's objectives in the revised version of the Re-Imagined Visitor Economy (THRIVE 2030) Strategy[34] which has targets to support visitor expenditure, major transformational projects, long-term economic growth, and regional job creation.

Tasmania's 2030 Visitor Economy Strategy provides a collective vision through to 2030 for sustainable growth, ensuring that the visitor economy continues to have a positive impact on the environment, economy and way of life.

Mountain bike trails have been specifically identified as iconic infrastructure and facilities that are game-changing for host communities, boosting visitation and local amenity for residents and visitors alike, and providing an influx of investment and employment during and following development.[35]

The project also aligns with the Tasmanian State Government's strategic goals as expressed through the T21 Visitor Economy Action Plan, the Southern Tasmania Regional Land Use Strategy (currently being updated), the Tasmanian Cycle Tourism Strategy 2017 and the Tasmanian Open Space Policy and Planning Framework 2010.

The project is identified as high priority in the Southeast Region Development Association (SERDA) Infrastructure Strategy October 2024.

The project aligns with the vision of the 2024 Mountain Bike Tourism Action Plan[36] for mountain bike tourism in Tasmania that will provide a sustainable, diverse range of unique mountain bike experiences that support communities and compel visitors to enjoy Tasmanian environments through trails.

The plan states that there is opportunity to maintain and enhance the appeal of Tasmania as an MTB destination by providing visitors access to further iconic Tasmanian environments and landscapes through trails. Whilst several potential infrastructure projects are identified the Wielangta Forest MTB trail is not specially included.

Similarly, the project is aligned with the now dated Tasmanian Mountain Bike Plan (2009)[37] which provides a framework for the coordinated development, management and marketing of mountain bike opportunities in Tasmania with a vision to provide a world-class, diverse range of outstanding mountain bike riding experiences showcasing Tasmania's natural environment to entice local, national and international riders.

Mountain biking developments are identified as a catalyst project under the pillar of Accessible Natural Wilderness and Cultural Heritage in the Southern Tasmania Destination Management Plan 2022—2025,[38] with the Southeast Mountain Bike Plan identified as an investment priority.

[34] Austrade 2023, THRIVE 2030 revised. The Re-Imagined Visitor Economy
[35] Tasmanian Government and Tourism Industry Council Tasmania, 2023, 2030 Visitor Economy Strategy Tasmania
[36] Mountain Bike Tourism Action Plan Developed by Robert Potter for the Mountain Bike Network – Tasmania February 2024
[37] Tasmanian Mountain Bike Plan September 2009, prepared for the Department of Economic Development, Tourism and the Arts - Sport and Recreation Tasmania, Inspiring Place with Dirt Art
[38] Southern Tasmania Destination Management Plan 2022—2025, TRC Tourism

5 SWOT analysis

Strengths

- ✓ Point to point trail utilising existing tracks and routes through a working forest that has outstanding views and stories to tell.
- ✓ An existing model in NZ with similar background, length etc has a strong track record of operational and financial success as a case study to utilise.
- ✓ The visitor economy infrastructure and skills regionally and locally are widespread and good.
- ✓ Sorell Council and SEMBA have commitment and strengths related to this proposal.
- ✓ Tasmanian MTB sector is strong and continues to grow with this potential product complimentary to the broader network.

Weaknesses

- ✓ The model of a point to point trail over 2 days with accommodation in the middle is not tested in Australia despite it being successful in NZ.
- ✓ Costly planning and regulatory approval processes may add to the cost.
- ✓ Commercialising the trail experience will be problematic and may not raise enough money to assist with maintenance.
- ✓ Land manager concerns may make the proposed alignment difficult to be approved.
- ✓ The trail experience has many partners and at times the partners may not agree on the directions or the costs and benefits of the trail's operations.

Opportunities

- ✓ To create a nationally significant MTB trail that offers stories and scenery.
- ✓ To generate economic growth to the region including increased regional income and employment.
- ✓ To involve the community and younger people in a worthwhile project that increases health and well-being outcomes.
- ✓ To diversify the economy of the region with additional product.
- ✓ To work with land managers on increased use of the area providing better community ownership and less illegal activity.
- ✓ Engagement with partners including the Tasmanian Aboriginal Centre.

Threats

- ✓ Emergency management response issues will need to be addressed including evacuation of injured trail users.
- ✓ Mountain bike markets become saturated, and visitors do not take on the premium experience offered on this trail.
- ✓ Wildfire or floods destroy the trail for an extended period of time making business continuity difficult for operators.
- ✓ The governance arrangement does not operate as effectively as proposed leaving the land managers and Councils exposed.

6 Governance models

Establishing an appropriate governance model for the proposed Wielangta Forest Mountain Bike Trail is essential to securing stakeholder and landowner approvals, and to enabling the trail to operate on a commercial basis that generates revenue for ongoing maintenance and the high-quality experience expected of a nationally significant trail.

Further, the governance of the proposed Wielangta MTB Trail needs to be transparent and effective so that the many groups involved in the trail's success can be a part of trail management and decision making.

Mountain bike parks in Australia and further afield (noting governance regulatory models differ in international destinations) have differing models depending on the circumstances for the individual park, the land tenure of the park, the communities and clubs involved, and the appetite of Local and State Governments to play an active role in governing the trail parks.

A range of options are available and discussed in this section of the business case.

6.1 Current broader regional governance

Sorell and Glamorgan Spring Bay Councils currently form a part of the SERDA. SERDA exists to promote and develop the economy of the SE Region covered by the four Council areas: Glamorgan Spring Bay, Tasman, Sorell and Clarence Councils, and advocate for economic and community outcomes in the region.

SERDA is unlikely to be part of the longer-term governance of the proposed Wielangta Forest Mountain Bike Trail due to the respective Councils being the managers of activities across their footprint. SERDA may however play a role in seeking business outcomes on and from the trail.

6.2 Good governance elements for mountain biking parks and trails

This list covers a range of factors that are considered essential for strong governance arrangements for trails. Very little work has been undertaken on evaluating different governance models for trails. One such report is the New Zealand Cycle Trail Evaluation Report from 2016.[39] We recognise that New Zealand operates under different legislative frameworks and management approaches; however, we have drawn on general conclusions from their experience where relevant.

Strong governance elements include:

- Clear committed and skilled governance entity
- Effective trail planning
- Clear coordination functions
- People resources dedicated to management
- Adequate resources for trail operations
- Ongoing funding
- Stakeholder and community partnerships and support
- Supportive government environment (particularly Local and State Government)
- Marketing, promotion, and experience development (linked to the regional trail entity and tourism organizations)
- Monitoring and evaluation ability in conjunction with the land manager.

Each element is discussed below.

[39] Ministry of Business, Innovation and Employment. Nga Haerenga – the New Zealand Cycle Trail Evaluation Report 2016.

Clear committed and skilled governance entity

Mountain bike destinations that realise their potential and deliver outstanding and sustainable experiences will have entities that have:

- Clear mandates for trail development and provision of leadership and vision
- Clear statements of roles and responsibilities of the various parties involved in the governance structure and in management tasks, particularly if the land manager is a Forest agency or Park Service where legislative parameters and risk controls must be considered
- Personnel with the skills and experience relevant to leadership, effective decision-making related to the trail and governance tasks
- Arrangements/agreements at a senior level with any agencies tasked with trail management and maintenance.

Where volunteer, non-profit organisations play a large role in trail governance, the skills and experience of Board members have been critical in driving trail development and gaining government, business and community support. This has been the case with the South Eastern Mountain Bike Association (SEMBA) leaders to date.

The availability of people with the appropriate skills and commitment to be Board members is an important factor in a decision to establish a non-profit organisation as a governing body for a trail. One risk for these types of governance arrangements can be the loss of key personnel with the organisations ability to deliver dependent upon one or two skilled people. Trail governance by local councils or land management agencies works best when those agencies are committed to the trail at a senior level and allocate ongoing people and financial resources to the trail.

Effective trail planning

Strategic planning by the trail governance entity for development and operation of the trail over time is important, just as working collaboratively with land managers is. The Concept Plan for the development of the Wielangta Forest MTB Trail has been driven by the community and used local knowledge and industry experience to their advantage.

Clear coordination function

Where trail governance and management involves multiple partners, there needs to be clear allocation of coordination responsibility. There needs to be an organisation, group or person that can drive an integrated and consistent approach to trail management, follow up on tasks and planning priorities, and report to the governance entity on progress. The entity must also be accountable to the land managers (in this case, there will be several spread across two Local Government Areas LGAs) in addition to State owned entities and private land owners.

Entities likely to be involved (to a greater or lesser degree) in the proposed trail should it be approved and funded include:

- Sorell Council (potential controlling entity and funding partner)
- Glamorgan Spring Bay Council (potential controlling entity and funding partner)
- Sustainable Timbers Tasmania (land manager)
- TPWS (land manager)
- SEMBA (user association and volunteer base)
- Private landowners in the south and north of the trail (potential hosts of part of the trail)
- Potential accommodation providers at Twamley Farm and Rheban (potential commercial service providers)
- Destination Southern Tasmania (potential promotion, industry engagement and marketing)
- East Coast Tourism (potential promotion, industry engagement and marketing)
- Others as appropriate.

Human resources dedicated to trail management

Trail management requires human resources with clear roles and accountability to provide executive support to, and implement the decisions of, the governance body (whatever its structure); oversee implementation of actions in trail plans; and coordinate activities by other agencies and stakeholders. Although costs are entailed, there are advantages in employing or contracting people with expertise in administration, financial management and other trail-related functions to supervise or assist in trail management tasks. In the case where a Council takes on management accountability for the trails, these skills will likely already exist within the organisation.

Many trails are managed mainly or entirely by volunteers, particularly trails that have been developed through the efforts of local community committees or user groups. There are risks in relying heavily on volunteer resources in an expanded trail network to manage functions such as administration,

coordination, day-to-day operations, marketing and promotion, and planning. While trail volunteers are often highly committed to the trail, their involvement over time may not be sustainable due to other life commitments and volunteer 'burn out.' As with many voluntary organisations, activities may lose impetus if key people leave. Use of trail Board members to carry out management tasks may also blur the distinction between governance and management and divert their attentions from leadership and governance to day-to-day operations.[40]

Adequate resources for trail maintenance and operation

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

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

Both funding and supervision skills and resources are required for day-to-day trail operations, either in-house, contracted or through partnerships. Operational programs are needed to schedule the conduct of works particularly on complex trails where different parties are involved in operations.

Further, the premium experience proposed to be offered as part of the suite of experiences on the Wielangta Forest MTB Trail means that the trail and associated infrastructure needs to be in very good condition for people to be willing to pay for the experiences on offer.

Ongoing funding

The lack of ongoing funding and a high reliance on government grants for construction has characterised the development of many trails in Australia, especially regional trail developments such as Wielangta. Trail development can occur in a 'stop-start' sequence dependent on successful grant applications and in some cases, there has been limited provision of funds for future management and maintenance, leading to heavy reliance on volunteers, or the deterioration of the trail and experience post construction.

Obtaining an allocation for initial management or ongoing maintenance costs in grants has been an effective strategy. For example, the 1996 Federal Government grant that assisted completion of the Bibbulmun Track included funds allocated to the establishment of the Foundation and funding of its initial operations.

The most successful trails and parks have also been most successful in obtaining and managing funds, whether by managing agency budget allocation, government grants, in-kind partnerships, fundraising (such a through donations, sponsorships), revenue from use, events and concession fees, earned income from sale of products and merchandise, and investment. Typically, these successful trails will utilise a diverse range of financial and in-kind resources. The governing entities of these trails have the skills and experience to gain support and funds allocation within agencies, government, business and the community and to utilise a range of funding opportunities.

There may be statutory and policy limitations on the types of fundraising that can be conducted by government agencies and local councils, and often limitations in grant guidelines on the types of organisations that can apply for grants. These limitations can extend to the use of funds raised. Non-profit organisations (such as Incorporated Associations and foundations) have more flexibility in developing alternative funding sources, provided they have the skills and resources to manage fundraising programs.

In the case of Wielangta this would most likely require funds to be raised off park (where the land is managed by the TPWS) to avoid the funds being returned to consolidated revenue without the necessary allocations for the maintenance and operations.

[40] Ministry of Business, Innovation & Employment (2013). *Nga Haerenga – The New Zealand Cycle Trail Evaluation Report 2016.*

Stakeholders and community partnerships

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

- representation on governance boards, steering or advisory groups
- coordination groups, such as the Otago Central Rail Trail Operators' Group (NZ)
- friends groups, which serve as a focus for community stewardship, volunteering and donations
- liaison with local user and health groups and organisations to develop opportunities for local people, health and exercise initiatives and events
- schemes to encourage tourism operators to provide trail-related products and services – such as the Bibbulmun Track Foundation's Walker Friendly Business Program and the Queenstown Trails Trust's (NZ) Official Partners Program.

Successful tourism trails and parks will usually have a supportive local tourism industry that has been built through active negotiation with operators, offering of incentives to encourage support and participation in the trail, and regular liaison and coordination.

Supportive government environment

Local, regional, state and national government policies, plans and programs that encourage and support mountain bike trails and parks and identify investment priorities are important for the funding of trail development and management. Ideally, trail governance entities need to have the skills and resources to leverage such potential opportunities offered by a supportive government environment in applying for grant funding.

Marketing promotion and experience development

Understanding a trail's current and potential local and visitor markets is an important part of business – it assists promoting the trail to, and developing the right products and services for, the people most likely to be attracted to it. Most MTB parks will involve a combination of local and visitor markets.

Analysis of mountain biking markets, needs and preferences and comparison with best practice mountain biking tourism in other places was included in a feasibility study and concept plan for new mountain biking trails near Derby in north east Tasmania. This was factored into the development and design of the trails which have quickly attracted a range of visitors and events and the development of new local bike-related products and accommodation.[41]

The most successful tourism trails are supported by effective information, marketing and promotion activities that attract visitor markets. Trail management needs to have the skills and resources to conduct these activities, or work in partnership with regional entities such as Destination Southern Tasmania and SERDA and negotiate with the tourism industry on the development of trail-related products and services. These skills are provided in several ways:

- in-house promotion and marketing
- partnerships with local or regional tourism organisations.

A dedicated trail website providing comprehensive information about trail opportunities, conditions and related products and accommodation is central to trail promotion. Increasingly the websites of successful parks are becoming 'one-stop-shops' where it is possible to learn about the trails and linked experiences, make bookings, make donations, purchase merchandise, catch up on news, volunteer and participate in the trail's community. Some trail organisations offer an integrated booking service for trail experiences although it is more common to provide links to operator websites. The Hauraki Rail Trail Charitable Trust (responsible for the 82 km Hauraki Rail Trail in New Zealand's North Island) provides a central accommodation booking service and organises self-guided rides.[42.]

[41] TRC Tourism (March 2013), *Potential for Mountain Biking in North Eastern Tasmania*, prepared for Northern Tasmania Development; TRC Tourism (April 2016), *Review of the Economic Potential of Stage 2 Development of Blue Derby MTB Trails – Extension to the East Coast*, prepared for Break O'Day Council.

[42] http://www.haurakirailtrail.co.nz

Partnerships with first peoples

Developing partnerships with the First Peoples is critical for the successful operation and development of mountain biking in Australia.

A governance model will ideally involve The Tasmanian Aboriginal Centre and deliver on the intent of the partnership approach.

Monitoring and evaluation

Ideally, effective trail management will include systems for monitoring trail conditions, use levels and visitor characteristics so that management can be adjusted over time to address new situations. Frequently visitor monitoring has been a low priority of trail managers due to lack of funds and personnel. The Wielangta Forest MTB Trail have the advantage of most of the trails being accessed through the Wielangta Forest Road. Resources and personnel (whether staff, contract or volunteer) are required to maintain electronic counters and interpret results. Periodic visitor surveys are also desirable to develop an understanding of trail markets and their satisfaction with the trail experience.

6.3 Governance models for the Wielangta Forest MTB Trails

The purpose of this section is to determine 4 options for the governance model for the Wielangta Forest MTB Trail with all models being designed to provide governance of the trails and raise the necessary funds to ensure adequate trail maintenance over the short, medium and long term.

In developing the models, we have considered the principles described in the previous section, and the need to ensure a model that works for the community and consistent with the Local Government Act and other regulatory mechanisms.

The models are assessed against criteria to determine the most beneficial model, noting that there is not one that is a perfect fit.

The models described and assessed are:

1. Sorell Council or Glamorgan Spring Bay Councill (or an entity controlled by both organisations) takes control. The choice of entity will be important and while it can be developed over the 2 year period, the entity type is recommended in this section
2. The existing SEMBA take the lead in managing the trail corridor
3. A new entity purpose designed (Incorporated Association) takes the lead in managing the trails
4. Another existing entity takes the lead in managing the trail
5. TPWS takes the lead in managing the trails.

Option 5 has been discounted and not further assessed. Advice from TPWS is that they do not have the resources to manage the day to day operations of the trail, and the legislative and policy setting would make innovative funding difficult.

Option 1 – Sorell Council or Glamorgan Spring Bay Council

Under this option, Sorell or a joint entity controlled by both organisations would take the lead and assume the land management responsibilities under licence or lease from the land owners and managers (voluntarily or through agreement as appropriate).

Either Council or the proposed entity could implement an advisory committee. It is also assumed strong collaboration with SEMBA will occur to ensure strong volunteer support continues.

The LGA would provide an underwriting capability and capacity to provide certainty to the landowners around maintenance and risk management and also continue the partnership with SEMBA and tourism organisations.

Option 2 – South Eastern Mountain Bike Association lead with the trails

SEMBA is a well led and established as an Incorporated Association that may be able to support the ongoing management and maintenance of the Wielangta Forest MTB Trail.

The ability for SEMBA to continue their current role under the expanded maintenance regime needs further consideration. The shift to a nationally significant trail experience will require professional resources to continue to progress the trail experiences and commerciality.

Option 3 – A new entity takes on management of the trails.

This option explores the creation of a purpose-built organisation (most likely an incorporated association) to take on management of the trails and experience.

The entity can have a constitution created specifically for the tasks at hand. The Board can be stipulated for the skills and any representation required.

The entity could be a new joint entity created by Sorell and Glamorgan Spring Bay Councils and the other land managers and most likely have representatives on the board.

Option 4 – Another existing entity takes on management of the trail.

This option would see the existing organisations maintain their respective roles in the ongoing operation of the trails, but another entity adapt their operations to take on management.

There may be options for another entity to adapt their constitution and purpose to take on management. This option has not been tested with any organisations or any other group as part of this business case. In some ways it is a variance of SEMBA taking on management of the trail.

6.4 Assessment of options

To assess the alternative governance models a set of criteria has been developed to determine to what degree each model will meet the vision and outcomes sought. Each model has been assessed against the following set of questions:

1) Is the model simple to initiate and administer over the longer term (including the need for legislative change)?
2) Does the model provide clear accountability? Does it appropriately allocate responsibilities and authority?
3) Does the model maximise the expertise offered by each partner?
4) Will the visitor experience and presentation of the trail network be substantially improved?
5) Will the new model facilitate commercial tourism opportunities across the trail network?
6) Does the model rely entirely on public funding?
7) Does the model leverage the opportunity to access a range of funding sources including enhanced cash flow to enable self-generated investment into facilities, assets and services?
8) Does the model provide an effective control environment to reduce key risks (to organisations, staff, volunteers, visitors, natural and cultural values) and indemnity?
9) Does the model provide for input and expertise of local user and community groups?
10) Does the model reduce overlap and inefficiencies between agencies and partners?

The following table assesses each of the four models against these criteria and applies a simple red, yellow or green rating to each:

Does not meet	Partially meets	Fully meets or has the potential to fully meet

Table 5. Assessment of governance options

Criteria	Model 1 – Existing LGA Lead	Model 2 – SEMBA Lead	Model 3 – New Entity Lead	Model 4 – Another existing entity lead
Is the model simple to initiate and administer over the longer term (including the need for legislative change)?	Partially. The entity would need agreement between the two LGAs (in the event of Sorell taking overall management). Once established, reporting of profit and loss, visit numbers, incidents and other performance measures could be instituted by Council and shared with land managers.	Partially. SEMBA already exists and has committed volunteers and leaders. Changes to the constitution may be required to expand the operation and employ staff. Some risk is evident if existing skilled office bearers leave, or the work load becomes too much.	Possibly. A new entity could be established over a period of time. The type of entity is critical. Engagement with partners would be critical.	Possibly. It would depend on the entity and its structure and constitution. No visibility on who this may be outside the Parks and Wildlife Service and SEMBA, so not considered simple.
Does the model provide clear accountability? Does it appropriately allocate responsibilities and authority?	Yes. Assuming Sorell Council takes the lead and has formal agreements in place with Glamorgan Spring Bay and the suite of land owners and land managers. Council can then enter into agreements with operators, clubs, companies and service providers to progress the vision and experience.	Partially. SEMBA is the representative MTB user group for the area and has established an Incorporated Association. It does not however have any existing agreements with land managers in the trail area.	Mostly. Any new entity established to manage the trail would be purpose built to ensure that it succeeded.	Possibly. It would depend on the structure of the entity and its constitution. Changes may be required.
Does the model maximise the expertise offered by each partner?	Yes. Sorell or Glamorgan Spring Bay could involve SEMBA in the ongoing management of the trail. A business enterprise(s) could also be established to support maintenance and volunteerism.	Possibly. Management of the expanded trails would be a stretch for the existing SEMBA. It would need to partner with, or contract others to maximise opportunities. Paid employment would be required in SEMBA to deliver the opportunities presented by the expansion as it would likely be beyond the capacity of existing volunteers.	Yes, The new entity would be designed to partner with Sorell and Glamorgan as well as the enthusiasts in SEMBA. It would seek expertise as required from partners including Destination Southern Tasmania and other land managers	Possibly. Depending on which entity takes on management of the trail. For example, Destination Southern Tasmania has expertise in industry engagement and marketing but not bike park operations.

Criteria	Model 1 – Existing LGA Lead	Model 2 – SEMBA Lead	Model 3 – New Entity Lead	Model 4 – Another existing entity lead
			including Sustainable Timbers Tasmania and private owners.	
Will the visitor experience and presentation of the trail network be substantially improved?	Yes. Sorell or Glamorgan Spring Bay would utilise its resources to implementing the Business Plan to a high degree of presentation and visitor experience.	Yes. Dependent upon ongoing funding for the provision of expanded professional services and the service model being developed and implemented.	Yes. Assuming the new entity can establish itself and begin a revenue stream to re-invest in quality service provision.	Possibly. Skills and governance arrangements would need to be put in place to augment the existing entity.
Will the new model facilitate commercial tourism opportunities across the trail network?	Possibly. The council will need to be able to act within an agreed business plan and involve partners. The existing Sorell and Glamorgan Spring Bay have strong business connections. Another entity such as Destination Southern Tasmania and East Coast Tourism can assist in business partnership facilitation.	Possibly. Resources will be required and a strong business plan to implement will need to be established with the partners. Existing SEMBA leadership has the skills to implement this.	Yes. On the assumption the new entity is purpose built and it has the skills required to work with industry and partners.	Possibly. Dependent upon the existing entity – and the rules governing their fund raising ability.
Does the model rely entirely on public funding?	Initially. Sorell would need to underwrite the maintenance and risk management of the trails post construction to satisfy the land managers and owners. Commercialising the trail to receive income offset costs but examples such as Derby indicate that Council will need to underwrite costs to show the benefits of the trails.	No. SEMBA would require support in the early years – most likely from Sorell and Glamorgan Spring Bay Council, to employ the skills and undertake the professional services that volunteers cannot undertake.	No. Support would be required initially from Sorell and Glamorgan Spring Bay Councils or another entity while the establishment phase of the entity and trail were underway. The plan would be to move to a supported role and eventually stand alone.	No. Depending on the entity, support from the LGAs would be required. Once established, the entity would raise funds through various means (see the chapter in this business case).
Does the model leverage the opportunity to access	Possibly. Sorell Council (or Glamorgan Spring Bay) would most likely need to create a business	Yes. SEMBA could undertake commercial opportunities but would need additional management skills.	Yes. The purpose-built entity could allow for	Possibly. To be fit for purpose, any existing entity taking management of the trail would need these skills and may

Criteria	Model 1 – Existing LGA Lead	Model 2 – SEMBA Lead	Model 3 – New Entity Lead	Model 4 – Another existing entity lead
a range of funding sources including enhanced cash flow to enable self-generated investment into facilities, assets and services?	enterprise to innovatively collect revenue.	Revenue collection off reserve (in the case of TPWS) is needed to ensure funds raised from the trail are able to be directly used in the ongoing management and maintenance of the trail.	this and would require appropriate skills.	need to alter constitution and employ skills.
Does the model provide an effective control environment to reduce risks (to organisations, staff, volunteers, visitors, natural and cultural values)	Yes. Council has appropriate procedures and skills within to manage risks, and to work with Sustainable Timbers Tasmania and TPWS and other land managers and owners on the management of the assets.	Possibly. Significantly increasing the size of the trail footprint and aligning the trail experiences to the	Possibly. Resources and skills would be required. It could be possible to utilise Sorell or Glamorgan Spring Bay policies and skills as a partner.	No. The existing entity would most likely not have the required skills and control policies and procedures to manage risk on the land.
Does the model provide for input and expertise of local user and community groups?	Yes. Sorell has good connections through the community. Strong relationships with SEMBA, other land managers and owners, Councils and others is critical.	Yes. SEMBA is a community group. Connections and partnerships with business, land owners and other groups is important and currently strong. Some risk if leadership changes.	Yes. A key for success will be the ability of the proposed new entity to work across sectors and groups and form strong partnerships.	Yes. Any fit for purpose organisation must be able to undertake this by working across groups and the community.
Does the model reduce overlap and inefficiencies between agencies and partners?	Partially. Council(s) will be required work with existing groups and utilise their own skills in project delivery, customer service and risk and asset management. Organisations such as TPWS and Sustainable Timbers set standards and targets for the entity to meet.	Partially. SEMBA would be required in some ways to duplicate functions currently undertaken by Council and the land managers including risk management	Possibly. This model does create another organisation – albeit purpose built to facilitate the effective development and running of the parl.	Possibly.

6.5 Proposed governance model.

Utilising the analysis undertaken above, a 2-stage governance model is proposed.

Stage 1 sees the proposal where Sorell Council taking on project management of the expanded trail network across both LGAs. Sorell Council would partner with Glamorgan Spring Bay Council and work on their behalf for the trail sections within their LGA. This proposal sees the larger size of Sorell Council and the resources at their disposal being able to be applied with duplication costs to both Councils.

It is suggested a Project Control Group (PCG) be established that includes Sorell Council, Glamorgan Spring Bay Council, Sustainable Timbers Tasmania, TPWS and Destination Southern Tasmania (on behalf of both regional tourism boards) and other relevant agencies or people. Sorell Council can apply for grant funding on behalf of the project with the support of the other partners. Sorell Council can utilise their asset management and project delivery experience in the trail's construction and expansion.

6.6 Recommended structure (Stage 1):

COUNCIL-LED PROJECT GOVERNANCE WITH INTER-COUNCIL MOU WITH AN ADVISORY GROUP OR WORKING GROUP

The working group or advisory group would include both LGAs, community reps, and stakeholders with a role that oversees planning, maintenance, marketing, and early-stage business development. Council would be the proponent and would work with SEMBA on construction.

LEGAL BASIS

This model is permitted under **s.20 & s.21** of the Local Government Act – councils may provide services and enter arrangements jointly.

An inter-council Memorandum of Understanding (MoU) or Section 21 agreement to clarify roles and responsibilities would be put in place.

FUNDING/MANAGEMENT APPROACH:

Sorell would underwrite operations and maintenance for two years. Early commercial activities (e.g. events, merchandise) can be managed via the existing council structure (subject to competitive neutrality obligations under Part 8 of the Act or via contracting out under procurement policies).

A period of 2 years would most likely allow the trail's establishment and the successful development of the second phase.

Recommended Stage 2 (Operational phase – post-Year 2): Establishment of a Special Purpose Entity (SPE)

The model most likely to meet the governance principles, regulations and legislation obligations is a company limited by guarantee.

COMPANY LIMITED BY GUARANTEE (CLG)

The company limited by guarantee model can have several shareholders (likely to be Sorell and Glamorgan Spring Bay Council) and appoint a Board based on the constitution formed, the purpose of the company and the skills required.

LEGAL BASIS

Created under the Corporations Act 2001 (Cth). It would be a separate entity from Council, with representation from both LGAs, industry, and community.

The entity can operate commercially while complying with competitive neutrality, principles and regulations.

Two alternate but less flexible options include:

- **Joint Authority (s.30, LGA 1993)** – formal statutory body established by two or more councils
- Limited agility for commercialisation
- Suitable only if a statutory, governance-heavy model is needed
- Incorporated Association (under Associations Incorporation Act 1964) – less suitable for managing commercial ops.

The Company Limited by Guarantee option is the preferred model for several reasons:

- It provides for transparent governance
- It is eligible for deductible gift recipient (DGR) status via foundation arm
- It can offer a clear separation from council to address commercialisation concerns, and
- It avoids risk of breaching competitive neutrality principles when earning income (e.g. via bike hire, events, café ops).

To assist with fundraising, a Foundation Arm (experience development + services) is also proposed.

The foundation would operate under the CLG (as a public fund or DGR-eligible foundation) and would focus on:

- Trail activation and tourism development
- Securing sponsorships and philanthropic investment
- Supporting community and volunteer participation.

To support appropriate governance, the foundation arm would be a separate subcommittee or trust under CLG. It can collaborate with tourism boards, industry groups, local businesses and others as appropriate.

KEY LEGAL AND GOVERNANCE CONSIDERATIONS

Several important considerations are taken into account in recommending this model:

- **Commercialisation:** CLG provides legal separation from councils and avoids perception of unfair advantage
- **Competitive Neutrality:** CLG structure with commercial governance model (including market-based pricing and open access) satisfies Part 8 of the LGA
- **Local Government Constraints:** Councils may not run a business unless complying with competitive neutrality. A CLG provides a compliant pathway
- **Shared Governance:** Inter-council MoU or S21 agreement in Stage 1, and shared Board appointments in Stage 2 as per a draft constitution
- **Funding & Grants:** CLG and Foundation can seek external grants more flexibly than councils directly.

Summary recommendation

1. Establish a Council-led governance arrangement with inter-council MoU in the first 2 years, where Sorell Council underwrites operational costs, and both Councils contribute to strategic oversight.
2. Transition after 2 years (or an appropriate time determined by the partners) to a Special Purpose Company Limited by Guarantee, with:

- A commercial governance framework
- Transparent oversight by both LGAs and community stakeholders
- A foundation or sub-entity for experience development, partnerships, and grant acquisition.

7 Preliminary planning and environmental advice

This chapter of the business case has been prepared on behalf of TRC Tourism by ERA Planning and Environment Consultants and has been reproduced in this business case with minor additions based on consultation undertaken by TRC Tourism with Sustainable Timbers Tasmania and the Parks and Wildlife Service.

7.1 Environmental assessment

Environmental desktop

A desktop review of the Proposal was undertaken via review of available information on the LIST database and the generation of a Natural Values Report and *Environment Protection Biodiversity Conservation Act 1999* (EPBC Act) Protected Matters Search.

Salient information from the desktop review is as follows:

- **Reserved land** – The proposed trail passes through several areas of reserved land including Three Thumbs State Reserve, Wielangta Conservation Area, Sandspit River Conservation Area and areas of Private Reserve and Informal Reserve. Approval for works within reserved land will be required (refer below)
- **Acid sulfate soils** – There are no areas of acid sulfate soil mapped along the proposed trail route. Although this does not mean acid sulfate soils could not be encountered, it suggests the risk is very low and, given the small scale of proposed excavation, further consideration of acid sulfate soils is unlikely to be required
- **Geoconservation sites** – One short section of the proposed trail (approx. 500m in length) passes through a mapped geoconservation site, namely the Sandspit River Sandstone Cliffs/Caves Complex. This geosite (ID 2750) is described as '*sandstone cliffs with large seepage-style caves and overhangs*'. Management notes for the site indicate that mechanical impacts of various sorts, including excavation, would damage features and that visitor impacts are possible and should be monitored. This suggests that trail construction (and the access facilitated by the trail) could have implications for the geosite, however with input from a suitably qualified geomorphologist it is likely that the trail can be sited and managed such that impacts can be avoided. As this geosite lies within the Sandspit River Conservation Area, protection of this geosite is likely to be addressed via Parks and Wildlife approvals.
- **Contaminated sites** – There are no mapped contaminated sites currently regulated by the Environmental Protection Authority (EPA) on the LIST database. Although areas of contaminated soils may be encountered, given the desktop results, the relatively minimal soil disturbance proposed and the generally natural state of the proposed trail route, risk of disturbing contaminated soils is low, and further consideration is unlikely to be warranted
- **Water bodies** – The proposed trail crosses several waterways including Orford Rivulet, Griffiths Rivulet, Wielangta Creek, Sandspit River and several other tributaries. The trail will need to be designed and constructed to minimise impacts to these waterways including physical impact to the waterways and downstream effects associated with erosion or sedimentation. This can likely be resolved via appropriate siting and engineering design
- **Ecology –**
  - Most of the proposed trail route is mapped as native vegetation, dominated by dry eucalypt forest and woodland in the north and wet eucalypt forest and woodland in the south. Some sections of the trail also pass through areas mapped as threatened vegetation communities (listed under the *Tasmanian Nature Conservation Act 2002* (NC Act)) including Eucalyptus globulus dry forest and woodland and Callitris rhomboidei forest
  - There are many threatened flora species, listed under the *Tasmanian Threatened Species Protection Act 1995* (TSP Act) and/or the EPBC Act 1999, either mapped along or nearby the proposed trail route or predicted to occur in

the region based on habitat mapping. There is a section of the trail in the north near Orford with several nearby records of *Ozothamnus lycopodioides* (clubmoss everlasting) and another section in the south (near Franklins Road) with many records of *Odixia achlaena* (golden everlasting). It is relevant to note that absence of previous records on the Natural Values Atlas is often a reflection of past survey effort, not a genuine representation of species distribution

- Being largely native, most of the proposed trail route is likely to be providing habitat for native fauna. The Natural Values Atlas Report and EPBC Act Protected Matters Report, identify many threatened fauna species either previously recorded or predicted to occur in the vicinity based on range and habitat mapping. Of particular note, the proposed trail lies within the Swift Parrot Important Breeding Areas (SPIBA), which are areas known or suspected to have supported a large portion of the swift parrot breeding population in any given year. The swift parrot (*Lathmus discolour*) is listed under both the Tasmanian TSP Act and Commonwealth EPBC Act. There are also several raptor nests within 1 km of the proposed trail alignment, including nest ID 397 which lies approximately 140 m from the proposed trail and nest ID 398 which lies approximately 500 m from the proposed trail. Both nests are mapped in a gully near Seventeen Acre Creek in the northern part of the route
- There are environmental and declared weeds mapped in the vicinity of the proposed trail, predominantly in the southern section.

Environmental approvals and recommendations

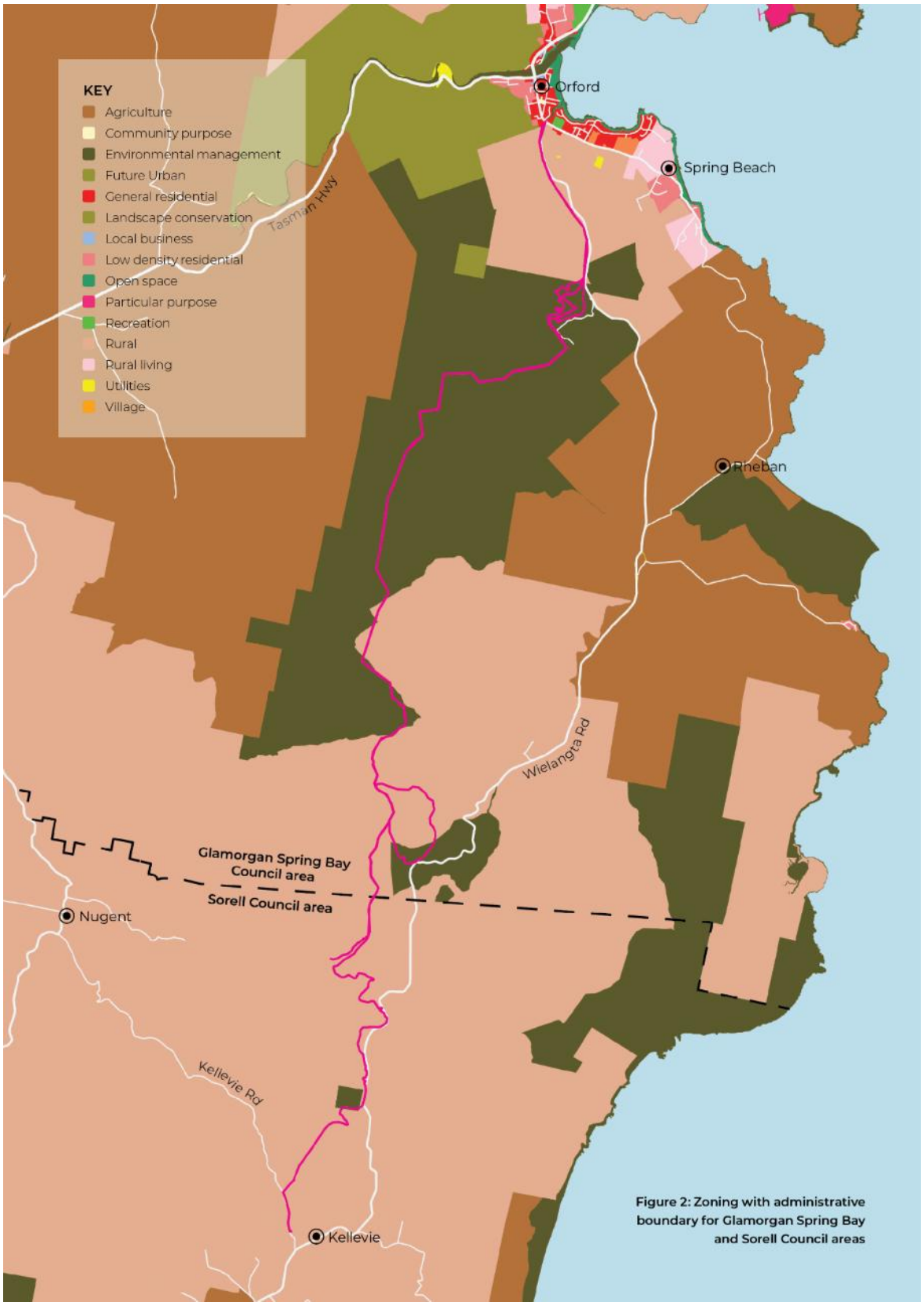
Based on the results of desktop review the following environmental studies/inputs are likely to be required:

- An ecological survey of the proposed route and immediate surrounds should be undertaken for any areas where ground disturbance or other impact to native vegetation is required. The ecological survey should include threatened vegetation communities, flora and fauna listed under both state and federal legislation. Consideration should also be given to weed and hygiene management, to minimise the risk of weed or pathogen introduction from either construction or operation of the trail
- If impacts within the Sandspit River Sandstone Cliffs/Caves Complex geosite are anticipated, a specialist geomorphologist should be engaged to assess potential impacts and provide advice on mitigation measures
- The track should be designed to minimise impacts to water bodies, where crossings are required, and generally ensure stable landforms which are not subject to erosion and associated offset impacts.

The following environmental approvals may be required for the trail construction, depending on the outcomes of the above tasks:

- As the trail passes through several formal reserves, associated approvals will be required
- Depending on the outcomes of the ecological survey, permits and approvals may be required under the Tasmanian TSP Act, NC Act, and *Nature Conservation (Wildlife Regulations) 2021* if impacts to listed vegetation communities, listed species or products of wildlife are anticipated. Additionally, a referral under the EPBC Act may be required in the event that impacts to EPBC Act listed species or communities cannot be avoided (this is considered unlikely, as avoidance can likely be achieved).

Figure 15. Zoning with administrative boundary between Glamorgan Spring Bay and Sorell Council areas.



Source: ERA Planning 2025

7.2 Planning controls

Planning scheme

The Proposal crosses through two local government areas. This includes the Sorell Council and the Glamorgan Spring Bay Council areas. See figure 15 for the boundary of the two administrative areas.

Both Council areas are subject to the *Tasmanian Planning Scheme*, with each area having a *Local Provisions Schedule*, which are planning scheme controls specific to that jurisdiction. Key controls such as the use class, and the requirements for satisfying zoning and code standards are identical for each jurisdiction for the Proposal. That is there are not local provisions in the form of a specific area plan or particular purpose zone that are applicable to the Proposal.

Use class

The Proposal will fall into the use class of *Passive Recreation*, pursuant to the *Tasmanian Planning Scheme.*

Passive Recreation has the following definition:

- *use of land for informal leisure and recreation activities principally conducted in the open. Examples include public parks, gardens and playgrounds, and foreshore and riparian reserves.*

It is understood that the Proposal includes 'works' through the construction of, or upgrades to trails, but does not include buildings.

Pursuant to *Part 1 – Preliminary, 3. interpretation (1)* of the *Land Use Planning and Approvals Act 1993 (*LUPA Act*)* 'works' has the following definition:

- *includes any change to the natural or existing condition or topography of land including the removal, destruction or lopping of trees and the removal of vegetation or topsoil, but does not include forest practices, as defined in the Forest Practices Act 1985, carried out in State forests.*

Zoning

The Proposal would cross the following zones:

- General Residential zone
- Rural zone
- Environmental Management zone
- Utilities zone

See figure 15 for the applicable zonings.

GENERAL RESIDENTIAL ZONE

The zone purpose of the General Residential zone, pursuant to *Clause 8.1 Zone Purpose*, as follows:

8.1.1 To provide for residential use or development that accommodates a range of dwelling types where full infrastructure services are available or can be provided.

8.1.2 To provide for the efficient utilisation of available social, transport and other service infrastructure.

8.1.3 To provide for non-residential use that:

a. primarily serves the local community, and

b. does not cause an unreasonable loss of amenity through scale, intensity, noise, activity outside of business hours, traffic generation and movement, or other off site impacts.

8.1.4 To provide for Visitor Accommodation that is compatible with residential character.

Use

The use of Passive Recreation in the General Residential zone is classified as a '*no permit required*' use class pursuant to *Table 8.2* of the planning scheme. Accordingly, it is expected that the Proposal is consistent with the zone purpose statements.

Use standards

The use standards only apply to discretionary uses and Visitor Accommodation and are therefore not applicable to this project.

Development standards

The development standards only apply to buildings. As there are no buildings proposed, these standards are not applicable to the Proposal.

RURAL ZONE

The zone purpose of the Rural zone, pursuant to *Clause 20.1 Zone Purpose*, of the planning scheme, is as follows:

20.1.1 To provide for a range of use or development in a rural location:

a. where agricultural use is limited or marginal due to topographical, environmental or other site or regional characteristics

b. that requires a rural location for operational reasons

c. is compatible with agricultural use if occurring on agricultural land, and

d. minimises adverse impacts on surrounding uses.

20.1.2 To minimise conversion of agricultural land for non-agricultural use.

20.1.3 To ensure that use or development is of a scale and intensity that is appropriate for a rural location and does not compromise the function of surrounding settlements.

Use

The zone purpose of the Rural zone, pursuant to *Clause 20.1 Zone Purpose*, of the planning scheme, is as follows:

20.1.1 To provide for a range of use or development in a rural location:

a. where agricultural use is limited or marginal due to topographical, environmental or other site or regional characteristics

b. that requires a rural location for operational reasons

c. is compatible with agricultural use if occurring on agricultural land, and

d. minimises adverse impacts on surrounding uses.

20.1.2 To minimise conversion of agricultural land for non-agricultural use.

20.1.3 To ensure that use or development is of a scale and intensity that is appropriate for a rural location and does not compromise the function of surrounding settlements.

Use standards

The use standards only apply to discretionary uses and are therefore not applicable to this project.

Development standards

The development standards only apply to buildings. As there are no buildings proposed these standards are not applicable to this project.

ENVIRONMENTAL MANAGEMENT ZONE

The zone purpose of the Environmental Management zone, pursuant to *Clause 23.1 Zone Purpose*, of the planning scheme, is as follows:

23.1.1 To provide for the protection, conservation and management of land with significant ecological, scientific, cultural or scenic value.

23.1.2 To allow for compatible use or development where it is consistent with:

a. the protection, conservation and management of the values of the land, and

b. applicable reserved land management objectives and objectives of reserve management plans.

Use

The use of Passive Recreation in the Environmental Management zone is a '*no permit required*' use class pursuant to *Table 23.2* of the planning scheme. Accordingly, it is expected that the Proposal is consistent with the zone purpose statements.

Use standards

The use standards only apply to discretionary uses and are therefore not applicable to this project.

Development standards

The following key clauses are relevant to the project:

Clause 23.4.1 Development area

The objective of this clause is to ensure that the development area is compatible with the values of the site and surrounding area and minimises disturbance.

To satisfy the acceptable solution the proposed development area would need to be less than 500m^2 or be in accordance with an authority under *National Parks and Reserve Management Regulations 2019* granted by the Managing Authority or the NC Act. It is anticipated that the permitted development area will be greater than 500 m^2 and it is unknown whether the Parks and Wildlife Service will issue the authority required to satisfy the acceptable solution. Accordingly, consideration of the corresponding performance criteria is required. The corresponding performance criteria requires that the development area does not cause an unreasonable impact on the values of the sites and surrounding area, having regard to the following:

(a) the design, siting, scale and type of development

(b) the operation of the use

(c) the impact of the development on the values of the site and surrounding area

(d) the need for the development to be located on the site

(e) how any significant values are managed, and

(f) any protection, conservation, remediation or mitigation works.

It is anticipated that the Proposal could satisfy the above criteria subject to the impacts on natural values being avoided or mitigated adequately through the micro-siting of the trail and the footprint being minimised to that necessary.

Clause 23.4.4 Vegetation management
The objective of this clause is to ensure that the site contributes to the values of the surrounding area by restricting vegetation removal. The acceptable solution can be met if the works are located on land where the native vegetation has been lawfully removed or is in accordance with an authority under *National Parks and Reserve Management Regulations 2019* granted by the Managing Authority or the NC Act.

it is unknown whether the Parks and Wildlife Service will issue the authority required and therefore consideration of the corresponding performance criteria is required. A Natural Values Assessment would be required to ensure compliance with the corresponding performance criteria. Subject to the sensitive micro-siting of the trail, ERA does not anticipate any issues with meeting the performance criteria.

UTILITIES ZONE

The zone purpose of the Utilities zone, pursuant to *Clause 26.1 Zone Purpose*, of the planning scheme, is as follows:

26.1.1 To provide land for major utilities installations and corridors.

26.1.2 To provide for other compatible uses where they do not adversely impact on the utility.

Use

The use of Passive Recreation in the Utilities zone is classified as a '*no permit required*' use class, pursuant to *Table 26.2* of the planning scheme. Accordingly, it is expected that the Proposal is consistent with the zone purpose statements.

Use standards

Use standards *Clauses 26.3.1 A1* and *A2* are not applicable to the proposal; acceptable solution A3 relates to Commercial vehicle movements and the loading and unloading of commercial vehicles. It is understood that there will be no commercial vehicle movements required for the operations of the use. These clauses are therefore not applicable.

Use Standard *Clause 26.3.2 Discretionary uses* is not applicable to the project as the proposed use is a no permit required use class.

Development standards

The development standards only apply to buildings. As there are no buildings proposed these standards are therefore not applicable to this project.

Planning scheme codes

The development standards only apply to buildings. As there are no buildings proposed these standards are therefore not applicable to this project. Any accommodation buildings would be developed privately on private land.

PARKING AND SUSTAINABLE TRANSPORT AND ROAD AND RAILWAY ASSET CODES

The parking and sustainable transport code applies to all use and development; the road and railway asset code applies to various use and developments including if a new junction or vehicle crossing is proposed.

There is no requirement for the provision of car parking spaces for a passive recreation use. Nonetheless if new parking spaces are proposed at either end of the trail Council has the capacity to request a traffic impact statement that confirms all parking spaces are compliant with *Australian Standard AS 2890*. Similarly, if a new vehicle crossing or junction is proposed, Council has the capacity to request a traffic impact statement that confirms the proposal does not create any adverse effects on the safety of a junction, vehicle crossing or level crossing or on the safety or efficiency of the road.

NATURAL ASSETS CODE

This code applies to development on land within the waterway and coastal protection area, the future coastal refugia area and within the priority vegetation area (if within the Rural zone and the Environmental Management zone).

The Proposal crosses through areas within the waterway and coastal protection area and the priority vegetation area. This code therefore applies to the proposal.

Accordingly, any application to Council is likely to require a natural values assessment to address the following development standards:

1. *Clause C7.6.1 Buildings and works within a waterway and coastal protection area or a future coastal refugia area.*
2. *Clause C7.6.2 Clearance within a priority vegetation area.*

LANDSLIP HAZARD CODE

This code applies to use or development of land within a landslip hazard area. The Proposal crosses through areas within both the low and medium landslip hazard areas. This code therefore applies to the proposal.

The use standards are not applicable to the proposal as the use of land for Passive Recreation is exempt pursuant to *Clause C15.4.1(c)(ii*) of the planning scheme.

A landslip hazard report will be required to address the following development standard:

1. *Clause C15.6.1 Building and works within a landslip hazard area*.

LOCAL HISTORIC HERITAGE CODE

The Proposal does not affect sites are listed in the Local Historic Heritage code in the Sorell Local Provisions Schedule or the Glamorgan Spring Bay Local Provisions Schedule.

7.3 Land tenure

The proposed trail is located within the following land tenures listed below and identified in Figure 13. The summary of the consents required to submit a valid planning application to Council is presented in this section Other landowner consents and lease agreements will be required to undertake works on all land tenures. Detailing these requirements are beyond the scope of this advice.

It is also important that engagement with the relevant landowner whether it be TPWS, Sustainable Timbers Tasmania or private freehold is undertaken as soon as possible. Early engagement is required to determine whether obtaining consent is feasible or whether the Proposal needs to be rerouted.

Private freehold

Any application on land located within private freehold will require notifying the owner of the intention to make a planning application, pursuant to s52 of the LUPA Act. It is highlighted that this consent is for planning approvals only.

Future potential production forest (Crown)

Pursuant to s52 of the LUPA Act, any planning application on Crown land requires the signature of the Minster, or their delegate, on the application form, accompanied by the written permission of that Minister, or Minsters delegate. Again, this is for planning approval only. Other landowner consents and lease agreements will be required to undertake works.

Conservation area

In addition to Crown land requiring the signature of the Minister or their delegate (a Reserve Activity Assessment (RAA) process is required for proposals located on reserved land managed by the Parks and Wildlife Service under the *National Parks Reserves Management Act 2002* and may also be required for public reserves managed by PWS under *Crown Land Act 1976*. This process determines whether a proposed use or development is acceptable on reserved land. The RAA process considers legislative requirements, statutory management plans (if applicable) and management objectives of the class of reserve, PWS policies and procedures, and the potential impacts on, or risks to natural, cultural and social values associated with a reserve. There are no public applicable management plans or site plans prepared by Parks and Wildlife Service for this area.

Local government area

Any application on land owned by local government requires written consent from the relevant Council General Manager, pursuant to s52 of the LUPA Act.

Permanent timber production zone land

Permanent timber production zone land refers to state-owned land in Tasmania designated for timber production, managed by Sustainable Timber Tasmania (STT) under the *Forest Management Act 2013*. These areas are primarily used for activities like native forest harvesting, reforestation, plantation harvesting, and related infrastructure like road and quarry construction. Consent from STT will be required. Recent empirical evidence has shown that STT are very hesitant to allow for mountain biking trails in proximity to areas designated for forest harvesting, reforestation and the like. Further engagement with STT should be undertaken as soon as possible to determine whether obtaining their consent is feasible or whether the Proposal should reroute around STT land. Initial consultation with STT confirms their hesitancy to approve recreational assets such as mountain biking. Consultation also indicated that they would consider any application on good faith.

7.4 Historic heritage

None of the subject sites are located on the Tasmanian Heritage Register.

7.5 Aboriginal heritage

An Aboriginal Heritage Desktop Review has been undertaken by Aboriginal Heritage Tasmania (AHT). It is identified that an Aboriginal heritage assessment be prepared for the Proposal. Refer below to further details.

There are a number of known Aboriginal heritage sites recorded within the proposed works footprint; however, AHT notes that records indicate the proposed works area has not been comprehensively assessed and therefore the absence of known Aboriginal heritage in these instances cannot be taken as an indication that there is no Aboriginal heritage present, but rather a result of the area having never been surveyed.

Accordingly, an Aboriginal heritage assessment is recommended to identify whether the future development of the tracks, as well as related, an/or ancillary infrastructure will impact on Aboriginal heritage and to offer avoidance and mitigation advice. This assessment should be undertaken jointly by a Consulting Archaeologist and Aboriginal Heritage Officer.

7.6 Conclusion

This environmental and planning advice relates to the MTB trail project that proposes the development of approximately 70 km of trails, linking the towns of Kellevie and Orford. The advice has addressed both the planning and environmental controls around the use and development of the trail.

The trail is classified as Passive Recreation, pursuant to the *Tasmanian Planning Scheme.* The Proposal would pass through four different zonings (General Residential, Rural, Environmental Management and Utilities) where passive recreation is a no permit required use class in all zones. The Proposal passes through multiple land tenure types that requires various consents including consent from the TPWS through the Reserve Activity Assessment process.

ERA does not anticipate any significant impediments to obtaining planning approval under the *Tasmanian Planning Scheme* subject to the sensitive micro-siting of the Proposal. The following key supporting technical reports are likely to be required to satisfy the planning scheme requirements:

- A landslip hazard report.
- A natural values assessment (including an ecological survey).

Advice was sought from Aboriginal Heritage Tasmania who identified that the Proposal would require

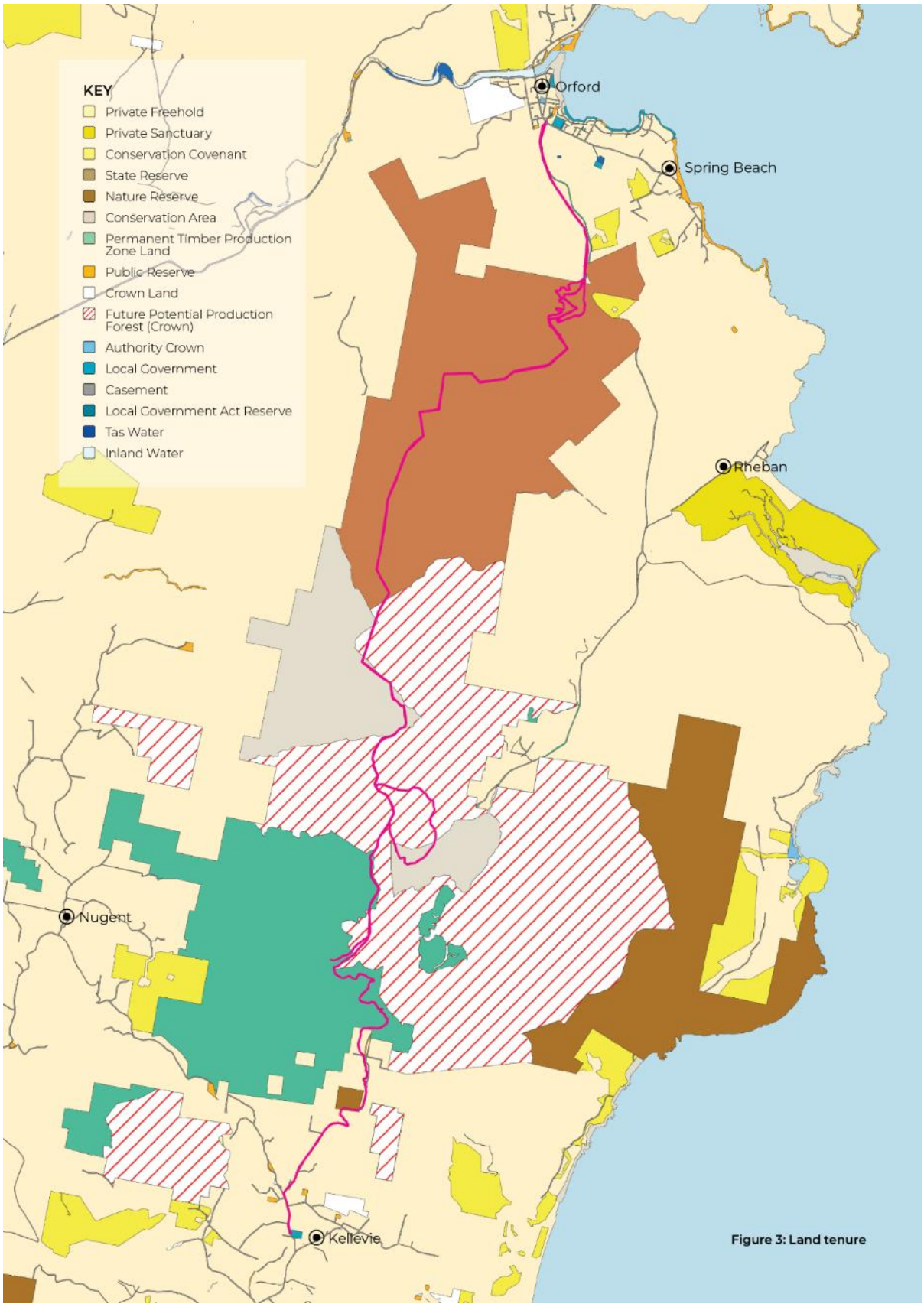
- An Aboriginal Heritage Assessment.

A desktop environmental review has identified information surrounding the land, water and ecology of the proposed trail route. Based on the results of the desktop review the following environmental studies/inputs are likely to be required:

- An ecological survey of the proposed route and immediate surrounds should be undertaken for any areas where ground disturbance or other impact to native vegetation is required[43].
- If impacts within the Sandspit River Sandstone Cliffs/Caves Complex geosite are anticipated, a specialist geomorphologist should be engaged.

[43] The need for environmental permits and approvals are dependent on the outcomes of the ecology survey

Figure 16. Land tenure map



Source: ERA Planning. 2025

8 Demand and use assessment

The operations of the trail are modelled with 10 year estimates developed for a mix of trail users, comprising local and regional residents and visitors to the region.

This modelling provides estimates of the likely users of the trail and the growth over time and are designed to be an indicative guide for the development and operation of the trail. The analysis was conducted in May-June 2025.

The analysis has been conducted by economic consultants MCa, a *Specialist Partner* of TRC.

8.1 Trail use numbers

This section outlines 10 year projections of trail users and their spending in the region (Sorell LGA and Glamorgan Spring Bay LGA). Appendix B outlines the basis of the modelling of user estimates and associated spending in the region. In the modelling, the user numbers grow over time as the trail is recognised and promoted to visitors and local residents/riders and MTB riders located in adjacent LGAs (including Hobart). Visitors who would use the trail are also estimated.

Mountain biking is a growing activity as the community is increasingly focused on fitness and active leisure. In addition, Visitors are increasingly interested in active experiences during their stay in a region.

These trail projections are used in the economic impact assessment and in the benefit cost analysis for the trail project.

Trail users – summary

There is limited direct information on potential trail users. Trail user numbers are modelled and estimated for a 10 -year period of operations.

Trail users comprise local/regional residents in the LGAs adjacent to and accessible to the trail and visitors who ride the trail or segments of it. Modelling is used to estimate the number of local & regional users and visitors (day visitors and overnight visitors).

The assumptions used in the modelling are outlined in Appendix B. Generally conservative assumptions have been used in estimating users and their spending patterns in the region during their visit and use of the trail.

Table 6. Catchment area for the proposed trail

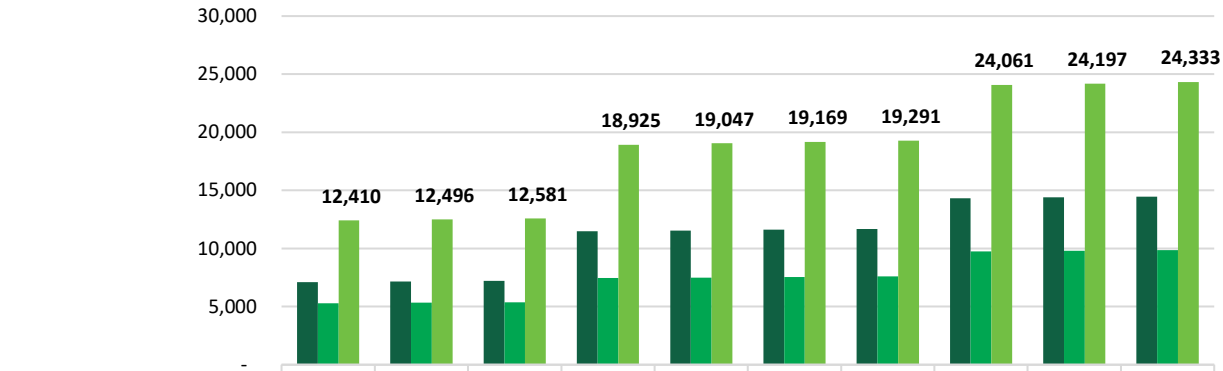
Catchment	LGAs		
Local & Regional Users			
Primary Catchment	Sorell & Glamorgan Spring Bay	Mainly day visitors but some overnight stays	Based on Tasmanian Govt population projections & AusPlay participation data & likelihood of using trail & average uses per year
Secondary Catchment	Break O Day, Northern Midlands, Southern Midlands, Brighton, Clarence, Hobart	A mix of day visitors & overnight visitors	Based on Tasmanian Govt population projections & AusPlay participation data & likelihood of using trail & average uses per year.
Visitor Users			
Visitors who use trail	Sorell LGA, Glamorgan Spring Bay LGA	Internationals, domestic overnight visitors, day visitors	Based on TRA data on cycling (2023) during vacations, and likelihood to use the trail

Source: MCa modelling & analysis, June 2025

The following chart shows estimates of all trail users over a 10-year period. Users are segmented into local users and visitors (tourists).

- Year 1 is projected to have 12,410 total users, with 7,115 being local and regional users and visitors accounting for 5,295 users
- By year 10, total users are expected to have grown to around 24,333 (14,465 local/regional users and 9,868 visitor users)
- The growth occurs with the increased interest in mountain biking by locals/regionals and visitors and the promotion of the trail experience.

Figure 17. Wielangta Forest Mountain Bike Trail (annual no.)



	Y1	Y2	Y3	Y4	Y5	Y6	Y7	Y8	Y9	Y10
Local & Regional Users MTB	7,115	7,163	7,211	11,475	11,547	11,619	11,691	14,320	14,393	14,465
Tourist Users - MTB	5,295	5,332	5,370	7,450	7,500	7,550	7,601	9,741	9,804	9,868
Total All Trail Users	12,410	12,496	12,581	18,925	19,047	19,169	19,291	24,061	24,197	24,333

Source: MCa modelling & projections, June 2025. May be differences due to rounding.

Table 7. Wielangta Forest Mountain Bike Trail users (annual no.)

Total MTB Trail Users (annual)	Y1	Y2	Y3	Y4	Y5	Y6	Y7	Y8	Y9	Y10
Wielangta Trail	2027	2028	2029	2030	2031	2032	2033	2034	2035	2036
Local & Regional Residents - MTB Trail Users	7115	7163	7211	11,475	11,547	11,619	11,691	14,320	14,393	14,465
Visitors - MTB Trail Users	5,295	5,332	5,370	7,450	7,500	7,550	7,601	9,741	9,804	9,868
Total Trail Users	**12,410**	**12,496**	**12,581**	**18,925**	**19,047**	**19,169**	**19,291**	**24,061**	**24,197**	**24,333**
Average Trail Users per Week (52 weeks)										
Local & Regional Residents MTB Trail Users	137	138	139	221	222	223	225	275	277	278
Visitors MTB Trail Users	102	103	103	143	144	145	146	187	189	190
Total Trail Users (ave. per week)	**239**	**240**	**242**	**364**	**366**	**369**	**371**	**463**	**465**	**468**

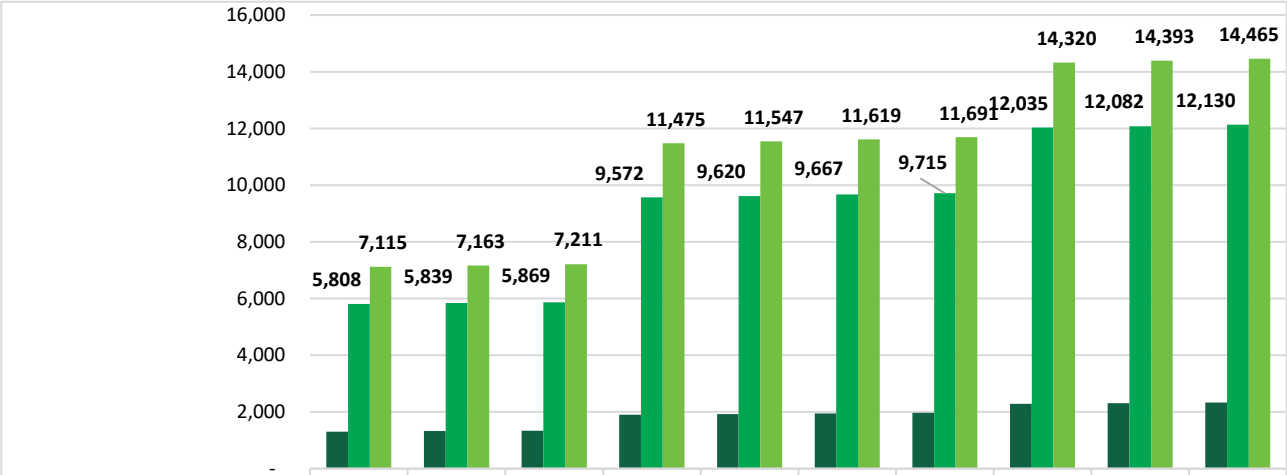
Source: MCa modelling & analysis, June 2025. May be differences due to rounding

Local and regional trail users

The chart below shows projections of local/regional trail users over the 10 year period. The primary catchment LGAs, include Sorell and Glamorgan Spring Bay. The secondary regional catchment (where most users come from) includes adjacent LGAs of Break O Day, Northern Midlands, Southern Midlands, Brighton, Clarence and Hobart.

- In year 1, the total number of local/regional users are projected at 7115, of which, 1,307 live in a primary catchment LGAs, and 5,808 live in a secondary catchment LGA
- By year 10, total local/regional users are 14,465 (2,335 from the primary catchment and 12,130 from the secondary catchment)
- The projected growth in local users reflects a combination of regional population growth, recognition of the trail and an increased interest in active recreation (mountain biking and cycling activities).

Figure 18. Wielangta Forest Mountain Bike Trail users – local and regional



Source: MCa modelling & analysis, June 2025. May be differences due to rounding.

Table 8. Wielangta Mountain Bike Trail local and regional users (annual no.)

MTB Trail Users (annual)	Y1	Y2	Y3	Y4	Y5	Y6	Y7	Y8	Y9	Y10
Wielangta Forest MTB Trail	2027	2028	2029	2030	2031	2032	2033	2034	2035	2036
Local & Regional Residents - MTB Trail Users	**7,115**	**7,163**	**7,211**	**11,475**	**11,547**	**11,619**	**11,691**	**14,320**	**14,393**	**14,465**
Primary Catchment	1,307	1,325	1,342	1,904	1,928	1,952	1,976	2,286	2,311	2,335
Secondary Catchment	5,808	5,839	5,869	9,572	9,620	9,667	9,715	12,035	12,082	12,130

Source: MCa modelling & analysis, June 2025. May be differences due to rounding.

Trail users - visitors

The tables and charts below shows projections of visitors of the trail by the characteristics of their stay

- As outlined, total visitors are projected to be 5,295 in the first year of operation. By year 10, this is expected to increase to 9,868 annual users
- International visitors are projected to account for 931 of the users in year 1 and grow to 1,697 users by year 10
- Domestic overnight visitors/users make up the largest projected proportion of trail users. In year 1, they account for 3556 users, rising to 5701 users by year 10. These domestic visitors are made up of interstate visitors (Y1 1713 & Year 10 2811) and intrastate visitors (Y1 1842 & Year 10 2890)
- Visitors on day visits account for 801 users in year 1 and increase to 2,470 users in year 10.

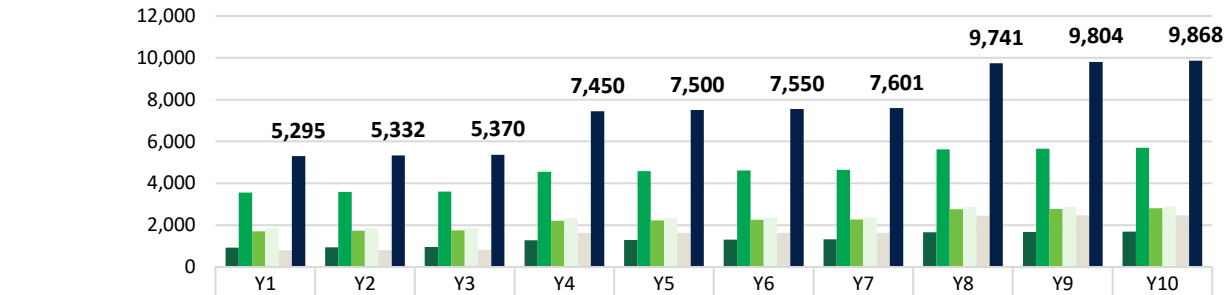
This growth in visitors reflects the combination of projected growth in total visitors to the region (Sorell and Glamorgan Spring Bay LGAs), promotion and recognition of the trail and businesses being established or extended to service users/visitors (e.g. bike hire and other on-trail activities/services, includes accommodation).

Table 9. Visitors to the Wielangta Forest Mountain Bike Trail (annual no.)

MTB Trail Users (annual)	Y1	Y2	Y3	Y4	Y5	Y6	Y7	Y8	Y9	Y10
Wielangta Forest Trail	2027	2028	2029	2030	2031	2032	2033	2034	2035	2036
Visitors - MTB Tail Users	**5,295**	**5,332**	**5,370**	**7,450**	**7,500**	**7,550**	**7,601**	**9,741**	**9,804**	**9,868**
Sorell LGA	1,371	1,379	1,387	2,022	2,033	2,045	2,057	2,706	2,721	2,735
Glamorgan Spring Bay LGA	3,925	3,954	3,983	5,428	5,466	5,505	5,544	7,035	7,083	7,133

Source: MCa modelling & analysis, June 2025. May be differences due to rounding.

Figure 19. Wielangta Mountain Bike Trail users – visitors (annual no.)



	Y1	Y2	Y3	Y4	Y5	Y6	Y7	Y8	Y9	Y10
Internationals	931	940	950	1,279	1,292	1,305	1,318	1,663	1,680	1,697
Domestic O/N	3,556	3,582	3,609	4,544	4,578	4,612	4,646	5,617	5,659	5,701
Interstate	1,713	1,730	1,748	2,206	2,229	2,251	2,273	2,755	2,783	2,811
Intrastate	1,842	1,852	1,861	2,338	2,349	2,361	2,373	2,862	2,876	2,890
Day Visitors	809	810	812	1,627	1,630	1,634	1,637	2,460	2,465	2,470
Total Users - Tourists	5,295	5,332	5,370	7,450	7,500	7,550	7,601	9,741	9,804	9,868

Source: MCa modelling & analysis, June 2025. May be differences due to rounding.

Table 10. Visitors using the Wielangta Forest Mountain Bike Trail user estimates – 10 years)

Total Visitors	Y1	Y2	Y3	Y4	Y5	Y6	Y7	Y8	Y9	Y10
Overnight Visitors										
Internationals	931	940	950	1,279	1,292	1,305	1,318	1,663	1,680	1,697
Domestic O/N	**3,556**	**3,582**	**3,609**	**4,544**	**4,578**	**4,612**	**4,646**	**5,617**	**5,659**	**5,701**
Interstate	1,713	1,730	1,748	2,206	2,229	2,251	2,273	2,755	2,783	2,811
Intrastate	1,842	1,852	1,861	2,338	2,349	2,361	2,373	2,862	2,876	2,890
Day Visitors										
Day Visitors	809	810	812	1,627	1,630	1,634	1,637	2,460	2,465	2,470
Total Users - Visitors	**5,295**	**5,332**	**5,370**	**7,450**	**7,500**	**7,550**	**7,601**	**9,741**	**9,804**	**9,868**

Source: MCa modelling & analysis, June 2025. May be differences due to rounding.

Overnight stays

Estimates are developed of potential overnight stays in the region associated with the trail as an indicator of future demand for accommodation (on-trail and in the region). Overnight stays comprise international visitors and domestic overnight visitors (average stay of 2 nights); and some local/regional users who stay overnight as part of their trail visit (average 1 night).

The trail will provide a boost to the regional accommodation sector, with new stay options likely to emerge to service this demand.

LOCAL AND REGIONAL TRAIL USERS – OVERNIGHT STAYS

Some local/regional trail users (particularly those from the secondary catchment) may have an overnight stay (average 1 night) associated with their trail use. These increase from 2,514 in year 1 to 5,169 in year 10. In the modelling it is assumed that for this group 40% would be on trail accommodation and 60% in other regional accommodation. Based on this mix there would be 1,006 nights in on trail accommodation and 1,508 other in year 1 and increasing to 2,067 and 3,101 nights year 10.

Table 11. Overnight stays – local and regional trail users (estimates annually)

Locals & Regionals	Y1	Y2	Y3	Y4	Y5	Y6	Y7	Y8	Y9	Y10
Overnights Stays	**2,514**	**2,529**	**2,544**	**4,101**	**4,124**	**4,147**	**4,171**	**5,123**	**5,146**	**5,169**
On trail Accommodation (40%)	1,006	1,012	1,018	1,640	1,650	1,659	1,668	2,049	2,058	2,067
Other Accommodation (60%)	1,508	1,518	1,527	2,461	2,475	2,488	2,502	3,074	3,087	3,101
Nights - Local & Regionals (Ave stay 1 night)	**2,514**	**2,529**	**2,544**	**4,101**	**4,124**	**4,147**	**4,171**	**5,123**	**5,146**	**5,169**
On trail Accommodation	1,006	1,012	1,018	1,640	1,650	1,659	1,668	2,049	2,058	2,067
Other Accommodation	1,508	1,518	1,527	2,461	2,475	2,488	2,502	3,074	3,087	3,101

Source: MCa modelling & analysis, June 2025. May be differences due to rounding.

VISITOR TRAIL USERS – OVERNIGHT STAYS

For visitors, persons staying overnight increase from 4,487 in year 1 to 7,398 in year 10. With an average stay of 2 nights, total nights increase from 8,973 in year 1 to 14,796 in year 10. These would be a mix for on trail accommodation (Y1 3,962 nights; Y10 6,597 nights) and other accommodation in the region (Y1 5,012 nights; Y10 8,199 nights).

Table 12. Overnight stays – visitor (estimates annual)

Visitors	Y1	Y2	Y3	Y4	Y5	Y6	Y7	Y8	Y9	Y10
Visitors										
Internationals	**931**	**940**	**950**	**1,279**	**1,292**	**1,305**	**1,318**	**1,663**	**1,680**	**1,697**
On trail Accommodation (60%)	559	564	570	767	775	783	791	998	1,008	1,018
Other Accommodation (40%)	372	376	380	512	517	522	527	665	672	679
Domestic O/N	**3,556**	**3,582**	**3,609**	**4,544**	**4,578**	**4,612**	**4,646**	**5,617**	**5,659**	**5,701**
On trail Accommodation (40%)	1,422	1,433	1,443	1,818	1,831	1,845	1,859	2,247	2,264	2,280
Other Accommodation (60%)	2,133	2,149	2,165	2,726	2,747	2,767	2,788	3,370	3,395	3,421
Total Visitors Overnight	**4,487**	**4,522**	**4,558**	**5,823**	**5,870**	**5,916**	**5,964**	**7,280**	**7,339**	**7,398**
On trail Accommodation	1,981	1,997	2,013	2,585	2,606	2,628	2,649	3,245	3,272	3,299
Other Accommodation	2,506	2,525	2,545	3,238	3,263	3,289	3,315	4,036	4,067	4,099
Nights – Visitors (Ave stay 2 nights)										
Internationals	**1,862**	**1,880**	**1,899**	**2,558**	**2,583**	**2,609**	**2,635**	**3,327**	**3,360**	**3,394**
On trail Accommodation	1,117	1,128	11,40	1,535	1,550	1,565	1,581	1,996	2,016	2,036
Other Accommodation	745	752	760	1,023	1,033	1,044	1,054	1,331	1,344	1,358
Domestic O/N	**7,111**	**7,164**	**7,217**	**9,088**	**9,156**	**9,224**	**9,293**	**11,234**	**11,318**	**11,402**
On trail Accommodation	2,845	2,866	2,887	3,635	3,662	3,690	3,717	4,494	4,527	4,561
Other Accommodation	4,267	4,298	4,330	5,453	5,493	5,534	5,576	6,740	6,791	6,841
Total Nights	**8,973**	**9,044**	**9,116**	**11,646**	**11,739**	**11,833**	**11,928**	**14,561**	**14,678**	**14,796**
On trail Accommodation	3,962	3,994	4,026	5,170	5,212	5,255	5,298	6,490	6,543	6,597
Other Accommodation	5,012	5,051	5,090	6,476	6,527	6,578	6,630	8,071	8,135	8,199

Source: MCa modelling & analysis, June 2025. May be differences due to rounding.

OVERNIGHT STAYS – ROOM REQUIREMENTS

Room requirements were estimated based on the total potential nights over the 10 year period. Based on the overnight stays and 360 nights, daily room requirements (single occupancy) increase from 32 in year 1 to 55 in year 10. If demand was all twin share daily rooms are 16 in year 1 and 28 in Year 10.

Table 13. Overnight stays – nights and room requirements (estimates annual)

Nights Accommodation	Y1	Y2	Y3	Y4	Y5	Y6	Y7	Y8	Y9	Y10
Nights - Local & Regionals (Ave stay 1 night)										
On trail Accommodation	1,006	1,012	1,018	1,640	1,650	1,659	1,668	2,049	2,058	2,067
Other Accommodation	1,508	1,518	1,527	2,461	2,475	2,488	2,502	3,074	3,087	3,101
Total Locals & Regionals	**2,514**	**2,529**	**2,544**	**4,101**	**4,124**	**4,147**	**4,171**	**5,123**	**5,146**	**5,169**
Nights - Visitors										
On trail Accommodation	3962	3,994	4,026	5,170	5,212	5,255	5,298	6,490	6,543	6,597
Other Accommodation	5012	5051	5090	6476	6527	6578	6630	8071	8135	8199
Total Visitors Over night	**8,973**	**9,044**	**9,116**	**11,646**	**11,739**	**11,833**	**11,928**	**14,561**	**14,678**	**14,796**
Nights – Total Trail Users										
On trail Accommodation	4967	5006	5044	6810	6862	6914	6966	8539	8601	8665
Other Accommodation	6520	6568	6617	8937	9001	9066	9132	11,145	11,222	11,300
Total All Nights	**11,487**	**11,574**	**11,661**	**15,747**	**15,863**	**15,980**	**16,098**	**19,684**	**19,824**	**19,965**
Ave per Night (360 nights)										
On trail Accommodation	14	14	14	19	19	19	19	24	24	24
Other Accommodation	18	18	18	25	25	25	25	31	31	31
Total Rooms (single use)	**32**	**32**	**32**	**44**	**44**	**44**	**45**	**55**	**55**	**55**
Twin Share Rooms										
On trail Accommodation	7	7	7	9	10	10	10	12	12	12
Other Accommodation	9	9	9	12	13	13	13	15	16	16
Total Rooms – Twin Share	**16**	**16**	**16**	**22**	**22**	**22**	**22**	**27**	**28**	**28**

Source: MCa modelling & analysis, June 2025. May be differences due to rounding.

9 Economic analysis

9.1 Trail use spending

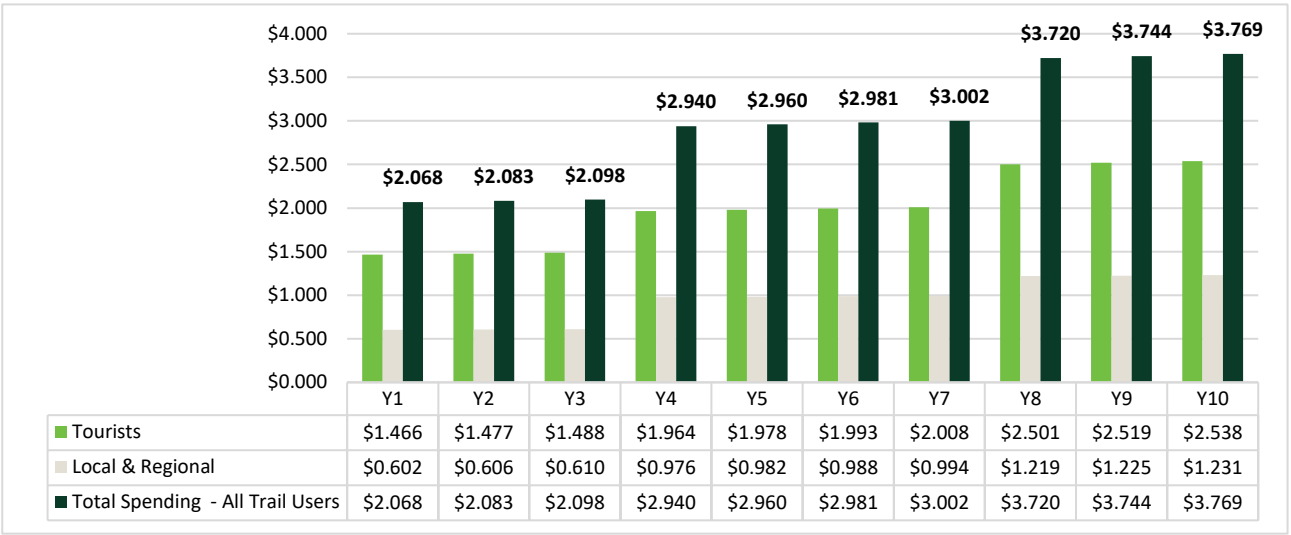
Summary – spending across all trail users

The chart below highlights varying spending levels across the broad trail user categories. Even though visitors account for a smaller proportion of trail users, they account for a much higher proportion of all spending.[44]

- Visitors are expected to spend approximately $1.466 million in year 1, increasing to $2.538 million by year 10.
- Local and regional trail users spend at a lower rate. In year 1, local users are projected to spend $0.602 million, growing to $1.231 in year 10.
- Total spending in the region by trail users increases from $2.068 million in year 1 to $3.769 million in year 10.

Appendix B outlines all the assumptions used in estimating trail user spending in the region (all spending is in constant $2025 prices).[45]

Figure 20. Spending in region by trail users ($m 2025 prices)



	Y1	Y2	Y3	Y4	Y5	Y6	Y7	Y8	Y9	Y10
Tourists	$1.466	$1.477	$1.488	$1.964	$1.978	$1.993	$2.008	$2.501	$2.519	$2.538
Local & Regional	$0.602	$0.606	$0.610	$0.976	$0.982	$0.988	$0.994	$1.219	$1.225	$1.231
Total Spending - All Trail Users	$2.068	$2.083	$2.098	$2.940	$2.960	$2.981	$3.002	$3.720	$3.744	$3.769

Source: MCa modelling & projections June 2025, May be differences due to rounding.

Spending by trail user type

The following table and charts show spending in the region by trail user type and for day visits and overnight stays. Trail users who stay overnight account for around 80% of spending in the region. Over the 10 years, a total of $29.364 million would be spent in the region by trail users, with visitors accounting for $19.932 million and local & regional users for $9.432 million.

Spending by visitors increases from $1.466 million in year 1 to $2.538 million in year 10. For local & regional users, spending increases from $0.602 million in year 1 to $1.231 million in year 10. Overall, total annual spending increases from $2.068 million in year 1 to $3.769 million in year 10.

44 This includes spending on accommodation, food and other visitor services.

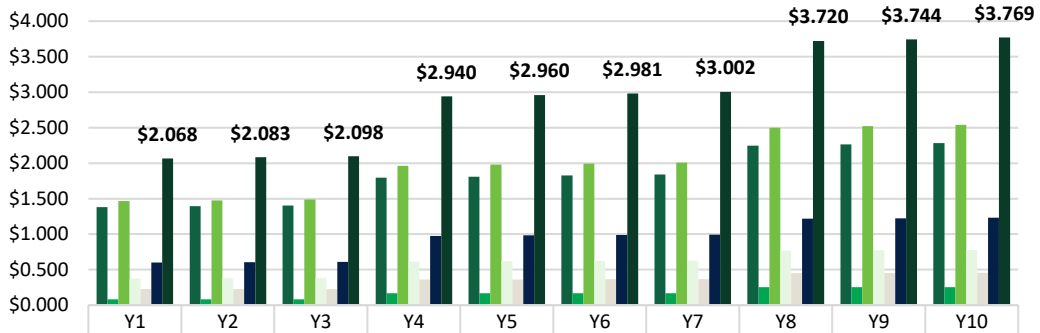
45 Average spending estimates for users are derived from Tourism Research Australia data for Sorell and Glamorgan Spring Bay LGAs (see Appendix B).

Table 14. Trail user spending – annual ($m 2025 prices)

Total Spending Trail Users	Y1	Y2	Y3	Y4	Y5	Y6	Y7	Y8	Y9	Y10	Total 10 Years
Visitors											
Visitors - Overnight	$1.382	$1.393	$1.405	$1.796	$1.810	$1.825	$1.840	$2.247	$2.266	$2.284	$18.248
Visitors - Day	$0.083	$0.083	$0.084	$0.167	$0.168	$0.168	$0.169	$0.253	$0.254	$0.254	$1.684
Total Visitors	**$1.466**	**$1.477**	**$1.488**	**$1.964**	**$1.978**	**$1.993**	**$2.008**	**$2.501**	**$2.519**	**$2.538**	**$19.932**
Local & Regionals											
Local & Regionals - Overnight	$0.377	$0.379	$0.382	$0.615	$0.619	$0.622	$0.626	$0.768	$0.772	$0.775	$5.935
Local & Regionals -Day	$0.225	$0.226	$0.228	$0.361	$0.363	$0.366	$0.368	$0.451	$0.453	$0.455	$3.497
Total Local & Regional	**$0.602**	**$0.606**	**$0.610**	**$0.976**	**$0.982**	**$0.988**	**$0.994**	**$1.219**	**$1.225**	**$1.231**	**$9.432**
All Spending											
Total All User spending	**$2.068**	**$2.083**	**$2.098**	**$2.940**	**$2.960**	**$2.981**	**$3.002**	**$3.720**	**$3.744**	**$3.769**	**$29.364**

Source: MCa modelling & projections June 2025, May be differences due to rounding.

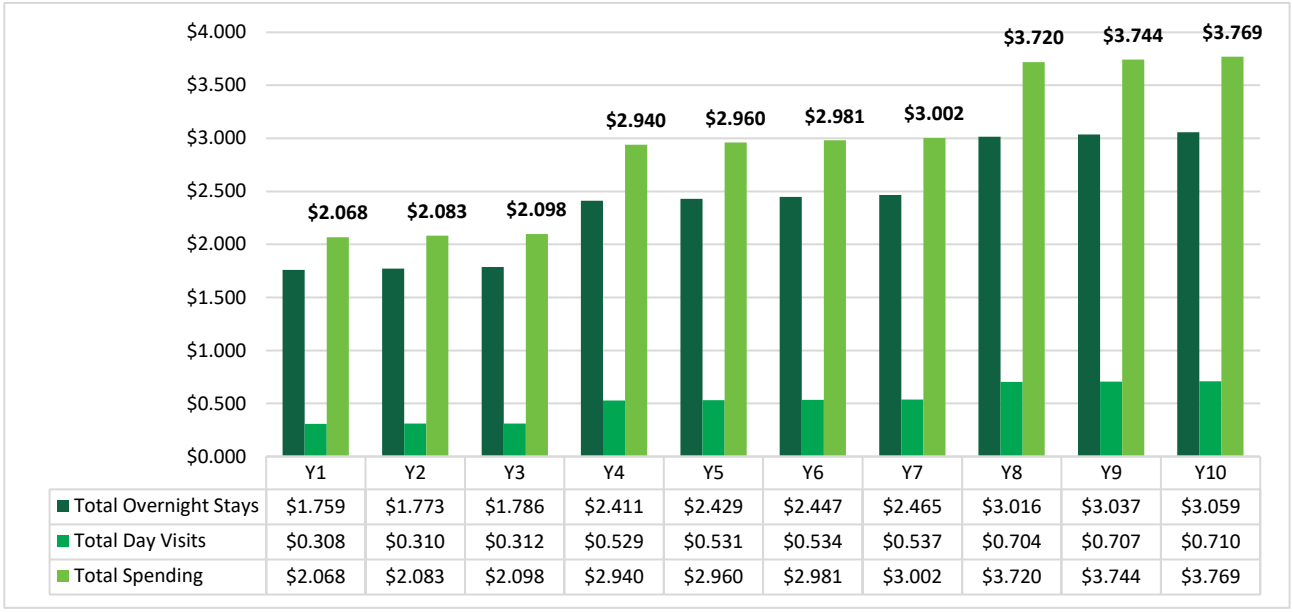
Figure 21. Spending in region by trail user types ($m 2025 prices)



	Y1	Y2	Y3	Y4	Y5	Y6	Y7	Y8	Y9	Y10
Tourists - Overnight	$1.382	$1.393	$1.405	$1.796	$1.810	$1.825	$1.840	$2.247	$2.266	$2.284
Tourists - Day	$0.083	$0.083	$0.084	$0.167	$0.168	$0.168	$0.169	$0.253	$0.254	$0.254
Total Tourists	$1.466	$1.477	$1.488	$1.964	$1.978	$1.993	$2.008	$2.501	$2.519	$2.538
Local & Regionals -Overnight	$0.377	$0.379	$0.382	$0.615	$0.619	$0.622	$0.626	$0.768	$0.772	$0.775
Local & Regionals -Day	$0.225	$0.226	$0.228	$0.361	$0.363	$0.366	$0.368	$0.451	$0.453	$0.455
Total Local & Regional	$0.602	$0.606	$0.610	$0.976	$0.982	$0.988	$0.994	$1.219	$1.225	$1.231
Total All User spending	$2.068	$2.083	$2.098	$2.940	$2.960	$2.981	$3.002	$3.720	$3.744	$3.769

Source: MCa modelling & projections June 2025, May be differences due to rounding.

Figure 22. Total spending in region by trail users ($m 2025 prices)



	Y1	Y2	Y3	Y4	Y5	Y6	Y7	Y8	Y9	Y10
Total Overnight Stays	$1.759	$1.773	$1.786	$2.411	$2.429	$2.447	$2.465	$3.016	$3.037	$3.059
Total Day Visits	$0.308	$0.310	$0.312	$0.529	$0.531	$0.534	$0.537	$0.704	$0.707	$0.710
Total Spending	$2.068	$2.083	$2.098	$2.940	$2.960	$2.981	$3.002	$3.720	$3.744	$3.769

Source: MCa modelling & projections June 2025, May be differences due to rounding.

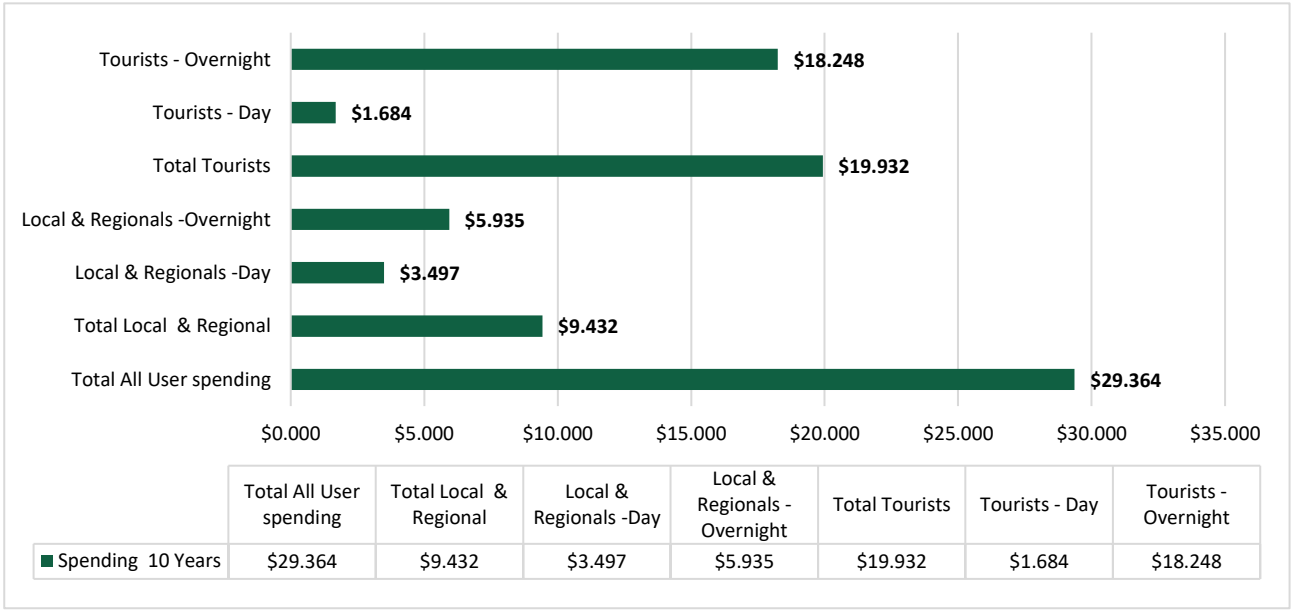
Spending – 10 years

The following chart show total trail user spending (in constant $2025 prices) over the 10 year period.

Spending by all users totals $29.364 million over this period. This comprises total local and regional users $9.432 million and all visitors $19.932 million.

For visitor users spending is overnight visitors $18.248 million; and day visitors $1.684 million. Local and regional trail users spending comprises overnight stays $5.935 million and day visitors/users $3.497 million.

Figure 23. Spending in region by trail users over 10 years ($m 2025 prices)



	Total All User spending	Total Local & Regional	Local & Regionals -Day	Local & Regionals - Overnight	Total Tourists	Tourists - Day	Tourists - Overnight
Spending 10 Years	$29.364	$9.432	$3.497	$5.935	$19.932	$1.684	$18.248

Source: MCa modelling & projections June 2025, May be differences due to rounding.

9.2 Trail construction costs

The total estimated cost of constructing the trail (inclusive of trail alignment, surface, signs, wayfinding, and other minor infrastructure sch as trail bridges etc) is $5 million.

This is based on the estimate contained in the Southeast Tasmania Mountain Bike Strategic Plan[46]. The $5 million is comprised of:

The 2023 estimated costs of $3,795,000

- Cost increases associated with 2.5 years of CPI increase
- Contingency sum for unknown events
- Project management fees
- Some planning funds.

A $5 million estimate is considered appropriate for the purposes of the business case.

Should the project proceed, then detailed alignment and costing would be appropriate at that step.

9.3 Trail construction – economic impacts

The economic impacts of the development of the trail are modelled for both the construction phase and the operations phase. The impacts are measured in terms of full time equivalent jobs (FTE) and the increase in regional income that is generated by construction activity and by trail users and their spending in the region.[47] Construction for the trail is estimated at $5.0 million, and this estimate is used in the modelling of construction impacts and the cost benefit analysis.

MCa's construction model allocates the $value of project costs to a number of categories:

- on site construction design & management
- materials supply and
- plant hire and wages.

It also includes a gross margin of 20% for the businesses doing the work. For estimating direct employment/regional income, the model uses ABS (2023) weekly wage rates (annualised) for the various activities (plus oncosts of 25%).

Indirect/indirect employment & regional income generated by employee spending is modelled based on:

- average employee/consumer spending patterns (CPI 2022 basket)
- average tax rates of 25% and
- a 3% savings rate.

The model estimates the local value added ($) component of each industry category of spending. The same approach is used in relation to annual wages by activity and oncosts.

Table 15. Wielangta Forest Mountain Bike Trail construction costs ($2025)

Summary Construction Costs (ex GST)	Construction Cost ($2025 Prices)
Construction	
Trail Construction	$5,000,000
Total Costs	**$5,000,000**

Source: TRC estimates based on the 2023 Strategic Plan

[46] Southeast Tasmania Mountain Bike Strategic Plan. GHD for SERDA. 2023

[47] Regional income is the total net income generated from the activity and covers wages and salaries of employees and profits of businesses within the region. It includes income generated directly within the business and indirect income, which is generated in other regional businesses (wages and profits) from the multiplier impacts of employee spending on the region. In the modelling of income generated, income tax and GST on spending, are both treated as leakages from the region. A significant % of the value of purchases is a leakage outside of the region. MCa's economic model measures the local value added component of the spending in the region.

Construction employment impacts

During the construction period for the trail overall 15.8 FTE jobs would be generated (12.2 FTE direct jobs and 3.6 FTE indirect jobs) and of the 12.2 direct jobs, 8.7 are in onsite construction, 2.0 are in materials supply, and 1.4 in design and project management.

Table 16. Jobs generated in the construction phase (FTE No.)

Summary Jobs	Direct Jobs	Indirect Jobs	Total Jobs
Construction on Site			
Construction on Site	8.7	2.5	11.2
Design & Management	1.4	0.4	1.8
Plant Hire	0.1	0.0	0.2
Materials Supply	2.0	0.6	2.6
Total Jobs	**12.2**	**3.6**	**15.8**

Source MCa modelling & analysis, June 2025. May be differences due to rounding.

Regional income impacts

During the construction period a total of $1.766 million in regional income would be generated in the Sorell/Glamorgan Spring Bay Region ($1.542million direct income and $0.224million indirect). Profits for the business building the trail are included in the regional income.

Table 17. Regional income generated in construction phase ($m 2025 prices)

Summary Regional Income	Direct Income	Indirect Income	Total Income
Construction on Site	$1,100,000	$160,050	$1,260,050
Design & Management	$175,000	$25,463	$200,463
Plant Hire	$15,000	$2,183	$17,183
Materials Supply	$252,000	$36,666	$288,666
Total Regional Income	**$1,542,000**	**$224,361**	**$1,766,361**

Source MCa modelling & analysis, June 2025. May be differences due to rounding.

9.4 Trail operations – economic impacts

MCa's *Regional Economic Impact Model* is used to estimate impacts in the region of trail operations over a 10 year period.

- The inputs are the spending in the region by the various categories of trail users, which is then allocated by industry category
- The model estimates the local value added associated with each type of spending and the wages share of these industries. Estimates are then generated of direct jobs (full time equivalent) in the businesses where trail users spend
- The model also produces estimates of indirect jobs generated by the spending of these direct employees with other businesses in the region
- Regional income (direct and indirect) estimates are also provided.

Appendix C contains a full description of the model.

Jobs in region

The following table and figures show the total jobs (direct and indirect) generated in the region by the operations of the trail. The number of jobs increase as the trail is promoted and recognised, and business servicing the trail develop and expand (e.g. bike hire, accommodation).

Total jobs increase from 11.2 FTE in year 1 to 20.5 FTE jobs in year 10. These comprise direct jobs servicing trail users (7.9 year 1 & 14.3 in year 10) and indirect jobs (3.4 year 1 & 6.1 in year 10).[48] The jobs are generated by the spending of trail users while they are in the region. The increase reflects the progressive growth in trail users over the period.

The jobs are mainly in sectors servicing visitor – accommodation, food & beverage, retail and recreation services (bike hire, shuttles and guides)

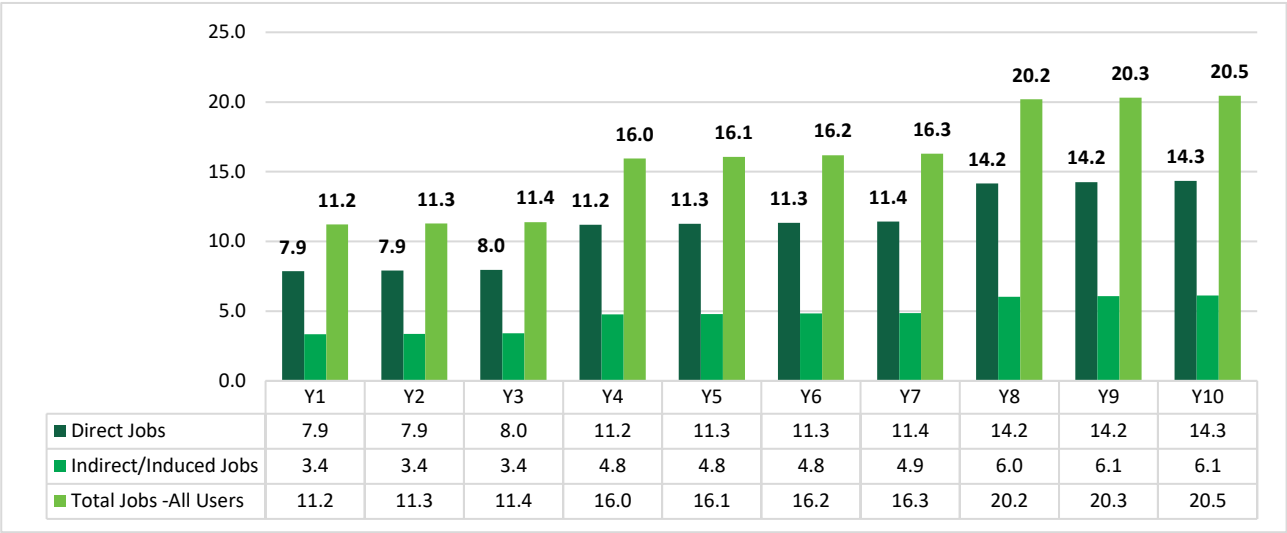
Table 18. Regional jobs generated by trail users (FTE number)

Total Trail Users -Locals & Regional Users	Y1	Y2	Y3	Y4	Y5	Y6	Y7	Y8	Y9	Y10
Trail Users -Locals & Regional Users										
Direct Jobs	2.3	2.4	2.4	3.8	3.8	3.8	3.9	4.7	4.8	4.8
Indirect Jobs	1.0	1.0	1.0	1.6	1.6	1.6	1.6	2.0	2.0	2.0
Total Trail Users - L & R	**3.3**	**3.3**	**3.4**	**5.4**	**5.4**	**5.4**	**5.5**	**6.7**	**6.8**	**6.8**
Total Trail Users - L & R										
Overnight	2.0	2.0	2.1	3.3	3.3	3.4	3.4	4.1	4.2	4.2
Day	1.3	1.3	1.3	2.1	2.1	2.1	2.1	2.6	2.6	2.6
Total Trail Users - L & R	**3.3**	**3.3**	**3.4**	**5.4**	**5.4**	**5.4**	**5.5**	**6.7**	**6.8**	**6.8**
Trail Users - Visitors										
Direct Jobs	5.5	5.6	5.6	7.4	7.4	7.5	7.6	9.4	9.5	9.6
Indirect Jobs	2.4	2.4	2.4	3.2	3.2	3.2	3.3	4.1	4.1	4.1
Total Trail Users - Visitors	**7.9**	**8.0**	**8.0**	**10.6**	**10.7**	**10.7**	**10.8**	**13.5**	**13.6**	**13.7**
Trail Users - Visitors										
Overnight	**7.4**	**7.5**	**7.6**	**9.7**	**9.8**	**9.8**	**9.9**	**12.1**	**12.2**	**12.3**
Day	**0.4**	**0.4**	**0.5**	**0.9**	**0.9**	**0.9**	**0.9**	**1.4**	**1.4**	**1.4**
Total Trail Users - Visitors	**7.9**	**8.0**	**8.0**	**10.6**	**10.7**	**10.7**	**10.8**	**13.5**	**13.6**	**13.7**
Total All Trail Users										
Direct Jobs	7.9	7.9	8.0	11.2	11.3	11.3	11.4	14.2	14.2	14.3
Indirect Jobs	3.4	3.4	3.4	4.8	4.8	4.8	4.9	6.0	6.1	6.1
Total Trail Users	**11.2**	**11.3**	**11.4**	**16.0**	**16.1**	**16.2**	**16.3**	**20.2**	**20.3**	**20.5**
Total Trail Users										
Local & Regional Users	**3.3**	**3.3**	**3.4**	**5.4**	**5.4**	**5.4**	**5.5**	**6.7**	**6.8**	**6.8**
Visitors Users	**7.9**	**8.0**	**8.0**	**10.6**	**10.7**	**10.7**	**10.8**	**13.5**	**13.6**	**13.7**
Total Trail Users	**11.2**	**11.3**	**11.4**	**16.0**	**16.1**	**16.2**	**16.3**	**20.2**	**20.3**	**20.5**

Source MCa modelling & analysis, June 2025. May be differences due to rounding.

[48] These indirect jobs are in local businesses supplying inputs to direct servicing businesses and businesses supplying goods and services to the direct employees.

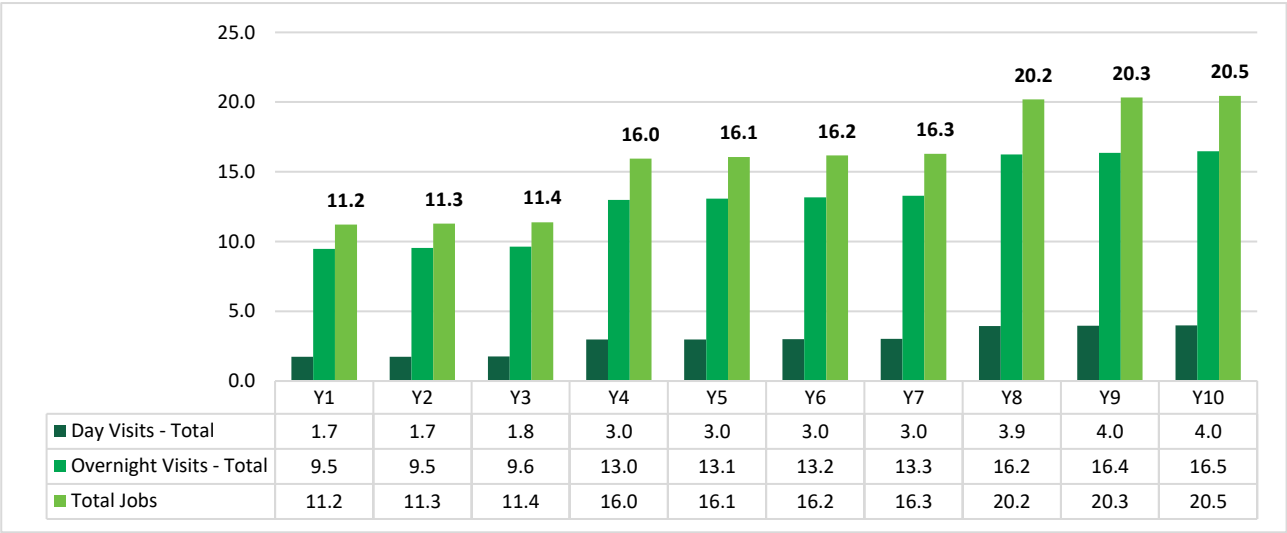
Figure 24. Jobs generated by all trail users (FTE number)



	Y1	Y2	Y3	Y4	Y5	Y6	Y7	Y8	Y9	Y10
Direct Jobs	7.9	7.9	8.0	11.2	11.3	11.3	11.4	14.2	14.2	14.3
Indirect/Induced Jobs	3.4	3.4	3.4	4.8	4.8	4.8	4.9	6.0	6.1	6.1
Total Jobs -All Users	11.2	11.3	11.4	16.0	16.1	16.2	16.3	20.2	20.3	20.5

Source MCa modelling & analysis, June 2025. May be differences due to rounding.

Figure 25. Total jobs generated by all trail users (FTE number)



	Y1	Y2	Y3	Y4	Y5	Y6	Y7	Y8	Y9	Y10
Day Visits - Total	1.7	1.7	1.8	3.0	3.0	3.0	3.0	3.9	4.0	4.0
Overnight Visits - Total	9.5	9.5	9.6	13.0	13.1	13.2	13.3	16.2	16.4	16.5
Total Jobs	11.2	11.3	11.4	16.0	16.1	16.2	16.3	20.2	20.3	20.5

Source MCa modelling & analysis, June 2025. May be differences due to rounding.

Jobs by industry

The table below shows the direct jobs generated by industry. Most of the direct jobs are in tourism characteristic industries (year 1 – 5.9 FTE jobs, increasing to 10.7 in year 10), with others in tourism connected industries (year 1 – 1.6 FTE jobs, increasing to 2.9 in year 10).

Table 19. Direct jobs by industry

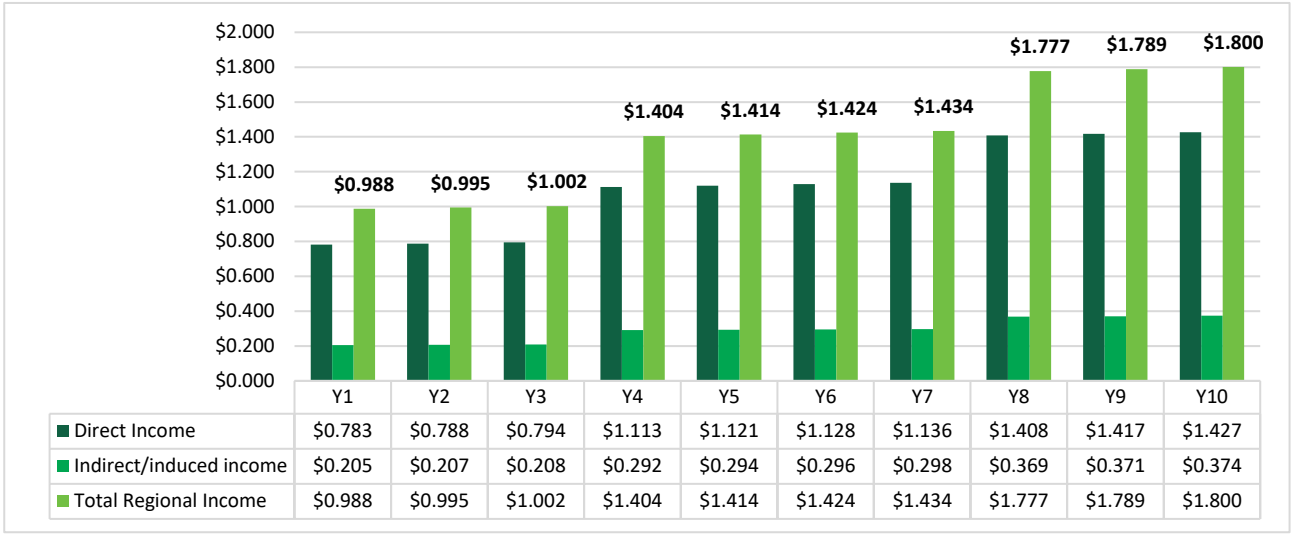
Direct Jobs by Industry	Y1	Y2	Y3	Y4	Y5	Y6	Y7	Y8	Y9	Y10
Total Tourism Characteristic Industries										
Accommodation	1.3	1.3	1.3	1.8	1.8	1.8	1.8	2.2	2.3	2.3
Cafes, restaurants and takeaway food services	1.1	1.1	1.1	1.5	1.6	1.6	1.6	2.0	2.0	2.0
Clubs, pubs, taverns and bars	1.3	1.3	1.3	1.9	1.9	2.0	2.0	2.5	2.5	2.5
Rail transport	0.0	0.1	0.1	0.1	0.1	0.1	0.1	0.1	0.1	0.1
Taxi transport	0.1	0.1	0.1	0.2	0.2	0.2	0.2	0.2	0.2	0.2
Other road transport	0.1	0.1	0.1	0.1	0.1	0.2	0.2	0.2	0.2	0.2
Air, water and other transport	0.1	0.1	0.1	0.1	0.1	0.1	0.1	0.2	0.2	0.2
Transport equipment rental	0.4	0.4	0.4	0.5	0.5	0.6	0.6	0.7	0.7	0.7
Travel and information services	0.6	0.7	0.7	0.9	0.9	0.9	0.9	1.2	1.2	1.2
Recreation Services	0.8	0.8	0.8	1.1	1.1	1.1	1.1	1.4	1.4	1.4
Total Tourism Characteristic Industries	**5.9**	**5.9**	**5.9**	**8.3**	**8.4**	**8.5**	**8.5**	**10.6**	**10.6**	**10.7**
Tourism Connected Industries										
Automotive fuel retailing	0.2	0.2	0.2	0.3	0.3	0.3	0.3	0.3	0.3	0.3
Other retail trade	1.2	1.3	1.3	1.8	1.8	1.8	1.8	2.2	2.3	2.3
Education and training	0.1	0.1	0.1	0.2	0.2	0.2	0.2	0.3	0.3	0.3
Total Tourism Connected Industries	**1.6**	**1.6**	**1.6**	**2.2**	**2.2**	**2.3**	**2.3**	**2.8**	**2.8**	**2.9**
All Other Industries	0.4	0.4	0.4	0.6	0.6	0.6	0.6	0.8	0.8	0.8
Total Direct Jobs (Employees & Working Proprietors)	**7.9**	**7.9**	**8.0**	**11.2**	**11.3**	**11.3**	**11.4**	**14.2**	**14.2**	**14.3**

Source MCa modelling & analysis, June 2025. May be differences due to rounding.

Regional income

The following charts and table show the regional income generated by trail users and their spending over the 10 year period. Regional income (in $2025 prices) increases from $0.988 million in year 1 to $1.800 million in year 10. Total income over the 10 year period is $14.027 million. Regional income includes wages, salaries, and profits. Direct income is that generated in the businesses directly servicing the trail users. Indirect income is that in businesses servicing consumer needs of the direct employees.

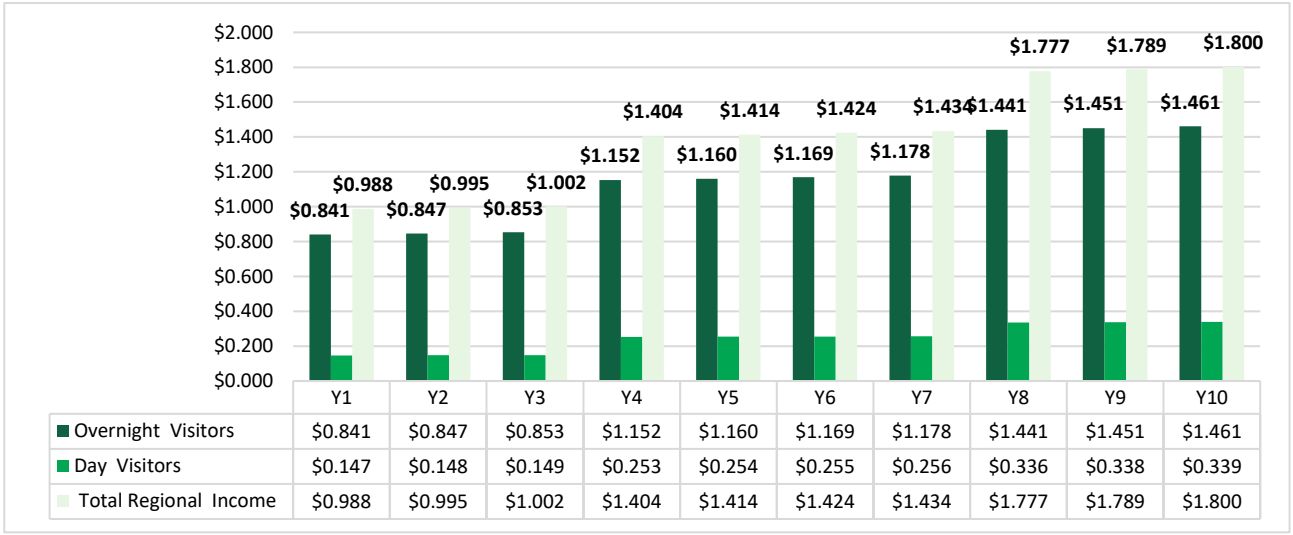
Figure 26. Trail operations – regional income by direct and indirect ($m 2025 prices)



	Y1	Y2	Y3	Y4	Y5	Y6	Y7	Y8	Y9	Y10
Direct Income	$0.783	$0.788	$0.794	$1.113	$1.121	$1.128	$1.136	$1.408	$1.417	$1.427
Indirect/induced income	$0.205	$0.207	$0.208	$0.292	$0.294	$0.296	$0.298	$0.369	$0.371	$0.374
Total Regional Income	$0.988	$0.995	$1.002	$1.404	$1.414	$1.424	$1.434	$1.777	$1.789	$1.800

Source MCa modelling & analysis, June 2025. May be differences due to rounding.

Figure 27. Trail operations – regional income by visitor type ($m 2025 prices)



	Y1	Y2	Y3	Y4	Y5	Y6	Y7	Y8	Y9	Y10
Overnight Visitors	$0.841	$0.847	$0.853	$1.152	$1.160	$1.169	$1.178	$1.441	$1.451	$1.461
Day Visitors	$0.147	$0.148	$0.149	$0.253	$0.254	$0.255	$0.256	$0.336	$0.338	$0.339
Total Regional Income	$0.988	$0.995	$1.002	$1.404	$1.414	$1.424	$1.434	$1.777	$1.789	$1.800

Source MCa modelling & analysis, June 2025. May be differences due to rounding.

Table 20. Regional income generated by all trail users ($m 2025 prices)

Total All Users ($m 2025 prices)	Y1	Y2	Y3	Y4	Y5	Y6	Y7	Y8	Y9	Y10	Total 10 years
Direct Income	$0.783	$0.788	$0.794	$1.113	$1.121	$1.128	$1.136	$1.408	$1.417	$1.427	$11.115
Indirect income	$0.205	$0.207	$0.208	$0.292	$0.294	$0.296	$0.298	$0.369	$0.371	$0.374	$2.912
Total Regional Income	**$0.988**	**$0.995**	**$1.002**	**$1.404**	**$1.414**	**$1.424**	**$1.434**	**$1.777**	**$1.789**	**$1.800**	**$14.027**
Overnight Visitors	$0.841	$0.847	$0.853	$1.152	$1.160	$1.169	$1.178	$1.441	$1.451	$1.461	$11.553
Day Visitors	$0.147	$0.148	$0.149	$0.253	$0.254	$0.255	$0.256	$0.336	$0.338	$0.339	$2.475
Total Regional Income	**$0.988**	**$0.995**	**$1.002**	**$1.404**	**$1.414**	**$1.424**	**$1.434**	**$1.777**	**$1.789**	**$1.800**	**$14.027**

Source MCa modelling & analysis, June 2025. May be differences due to rounding.

9.5 Benefit cost analysis

Benefit cost analysis is the approach used to assess a project or investment and the returns that it will deliver. In an assessment of a trail the measured benefits to the community are compared with the total costs (initial investment in the construction and the estimated costs of maintaining the trails). Benefits and costs are compared over a 10 year period.[49]

Project costs

The construction costs and operational costs associated with the development of the trail are shown below. The costs comprise $5.0 million in development and construction costs and maintenance and operational costs (over 10 years) of $2.5 million.[50]

Table 21. Trail project costs over 10 years ($2025 prices)

Summary Construction Costs (ex GST)	Project Costs
Trail Construction Costs	$5,000,000
Maintenance Costs - 10 Years	$2,500,000
Total Costs – 10 Years	**$7,500,000**

Source: TRC estimates, June 2025

Benefits of trail operations

MODELLING BENEFITS

The benefits of the trail comprise:

- the increase in regional income generated by user spending
- health benefits – the reduction in health costs associated with exercise (trail rides)
- the user valuation of the trail experiences, based on a shadow price (per trail user) as there are no user charges for the trail, and
- the improvement in productivity (for persons in employment) associated with exercise on the trail.[51]

See Appendix B for definition and sources.

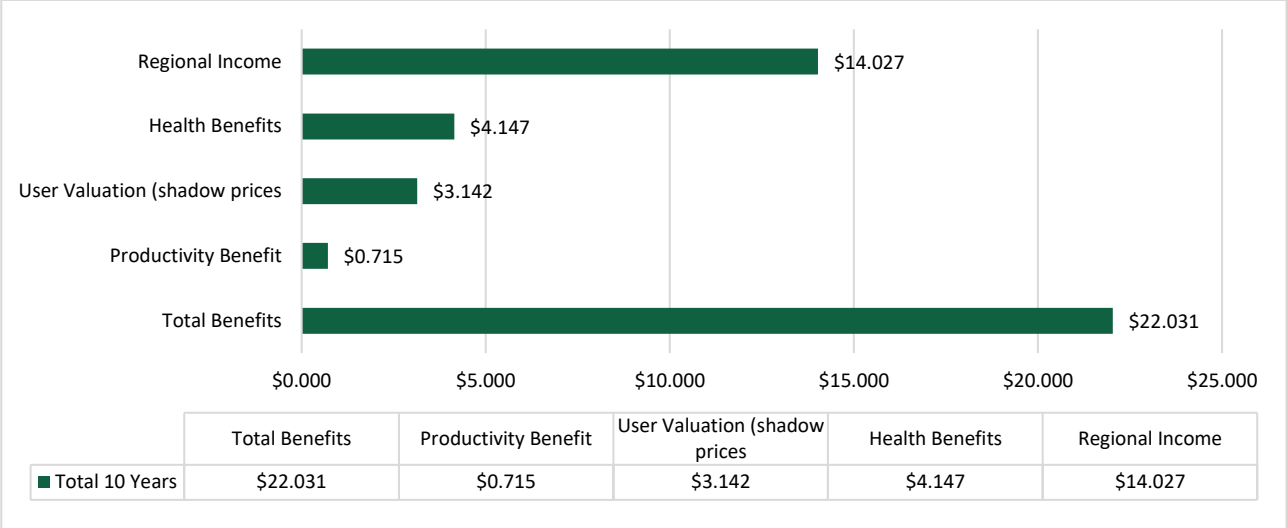
The benefits are quantified (in $ million 2025 prices) over a 10 year period. These benefits total $22.031 million over this period:

- regional income ($14.027 million)
- health benefits ($4.147 million)
- user valuation ($3.142 million)
- productivity benefits ($0.715 million).

The following chart shows the project benefits.

[49] It is normally a requirement for funding provided by the Commonwealth and State Governments for projects, that a cost benefit analysis be prepared.
[50] Estimated costs of $250,000 (in $2025 prices) per year and $2.5 million over 10 years. Annual costs estimated at 5% of capital cost.
[51] As there are no charges for using the trail, a consumer valuation of the user experience is measured by providing a shadow price (what a user might be willing to pay). For this analysis a shadow price of $20 per person was applied (see Appendix B).

Figure 28. Project benefits – total over 10 years ($m 2025 prices)



Source MCa modelling & analysis, June 2025. May be differences due to rounding.

The following tales break the benefits down by benefit type and year.

Table 22. Measuring benefits from trail operations

Benefits (included in analysis)	Description	Value 10 Years ($ million 2025 prices)
Regional Income	Increase in regional income generated by users and their spending in the region.	$14.027
Health Benefits	Reduced health costs (public & private) associated with exercise activity. Benefits calculated for local users & visitors.	$4.147
User valuation (shadow price)	Based on a shadow price of $20 per trail user ($2025 prices). Valuation for local users & visitor users.	$3.142
Productivity Benefit	Exercise improves a person's productivity and reduces absenteeism. Valuation for local users & visitor users.	$0.715
	Total Benefits	**$22.031**

Source MCa modelling & analysis, June 2025. May be differences due to rounding.

Table 23. Benefits of the trail by year ($m 2025 prices)

Benefits of Trail	Y1	Y2	Y3	Y4	Y5	Y6	Y7	Y8	Y9	Y10	Total 10 years
Regional Income	$0.988	$0.995	$1.002	$1.404	$1.414	$1.424	$1.434	$1.777	$1.789	$1.800	$14.027
Health Benefits	$0.282	$0.284	$0.286	$0.423	$0.426	$0.428	$0.431	$0.526	$0.529	$0.532	$4.147
Users Value – (Shadow Price)	$0.213	$0.215	$0.216	$0.320	$0.323	$0.325	$0.327	$0.399	$0.401	$0.403	$3.142
Productivity Workforce	$0.049	$0.049	$0.049	$0.073	$0.073	$0.074	$0.074	$0.091	$0.091	$0.092	$0.715
Total Benefits	**$1.531**	**$1.542**	**$1.553**	**$2.221**	**$2.236**	**$2.251**	**$2.266**	**$2.793**	**$2.810**	**$2.828**	**$22.032**

Source MCa modelling & analysis, June 2025. May be differences due to rounding.

Benefit cost analysis

Annual benefits ($2025 prices) are estimated for a 10 year period and these benefits are then discounted to calculate an aggregate present value to compare with the construction and maintenance costs. Several discount rates (3%, 7%,10%) are used for this present value calculation. These discount rates are those required by state governments and the Australian Government for business cases and cost benefit assessments.

The following analyses construction costs and benefits over the 10 year period for the trail. The benefits for trail are compared with the capital costs for the new trail development. Benefits are discounted by the 3 discount rates.

When the benefits and construction/maintenance costs are considered, the project yields a benefit cost ratio (BCR) of 2.5 for a 3% discount rate, a BCR of 2.0 for a 7% discount rate and 1.7 for a 10% discount rate. Benefit cost ratios compare the aggregated discounted benefits over 10 years with the total project costs over this period.

For the 7% discount rate every dollar spent on the trail (over 10 years) delivers a benefit of two dollars.

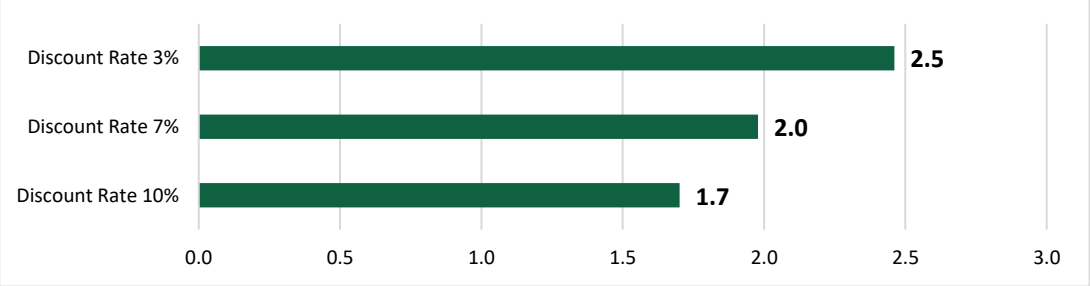
Table 24. Benefit cost analysis – Wielangta Forest Mountain Bike Trail

Wielangta Trail **Regional Cost Benefit ($2025 prices)** **Period: 10Years**	**Discount Rate 3%**	**Discount Rate 7%**	**Discount Rate 10%**
A. Project Costs			
Capital Costs	$5,000,000	$5,000,000	$5,000,000
Costs - Maintenance (10 years)	$2,500,000	$2,500,000	$2,500,000
Total Costs	**$7,500,000**	**$7,500,000**	**$7,500,000**
B. Project Benefits			
Direct Benefits - User Value (Shadow Price)	$3,142,077	$3,142,077	$3,142,077
Regional Income Increase (users)	$14,027,330	$14,027,330	$14,027,330
Health Benefits (exercise)	$4,147,541	$4,147,541	$4,147,541
Workforce Productivity	$715,451	$715,451	$715,451
Total Benefits	**$22,032,399**	**$22,032,399**	**$22,032,399**
Total Benefits ($) Present Value	$18,454,860	$14,837,371	$12,757,640
Net Present Value ($) Total Benefits	**$10,954,860**	**$7,337,371**	**$5,257,640**
NPV/Cost	1.5	1.0	0.7
Benefit Cost Ratio (BCR)	**2.5**	**2.0**	**1.7**

Source: MCa Modelling June 2025.

The following shows the benefit cost ratios across the 3 discount rates.

Figure 29. Benefit cost ratio (BCR) – Wielangta Forest MTB Trail (10 years)



Source: MCa Modelling June 2025.

10 Trail operations – financials

10.1 Income sources

Table 25 below examines the various types of revenue for the Wielangta Forest MTB Trail, identifying their strengths, weaknesses, and opportunities. Where applicable, specific examples are included.

An estimated amount that could potentially be raised is provided, based on market knowledge and probability. This estimate is intended solely to determine a total figure from the discussed sources.

Table 25. Income source and strengths, weakness and opportunity for Wielangta Forest MTB Trail

INCOME SOURCE	STRENGTH	WEAKNESS	OPPORTUNITY
Government funding for maintenance	Can be applied for as a grant or as an annual amount. The Tasmanian Government or the land managers (Predominantly Parks and Wildlife Service, Sustainable Timbers Tasmania) would be likely to support the application to de-risk maintenance on the trail. Would provide the base funding for the asset maintenance – with raised revenue from other sources adding to the base.	Difficult to attract maintenance funding for a mountain bike park outside of agency funds. PWS are stretched for funding and have a large asset base. STT are not likely to fund directly as it outside the core business.	Unlikely to be available but it is worth applying for. Funding may be available as a 'start-up' fund to enable the new governance model to be put in place. No estimate is provided for this.
Local Government Funding	The trails are located in two LGAs – Sorell and Glamorgan Spring Bay. Both could apply funds for the trails operation in agreement – but not necessarily in even portions. LGA funds could be considered as for any other public recreational facility such as a sporting oval or a pool. Could be applied in a cap and collar method – whereby the funds are for an initial period, capped at a certain amount and applied on a dollar-for-dollar basis with the proposed new entity (Company Limited by Guarantee) once operational.	Both Local Governments would need to consider the model and benefits to the broader rate base.	Strong potential. Most successful mountain bike parks on public land have local government support of some kind. A seed or initial fund would help the trail and its governance establish a strong foundation. Assumed that in the first two years, approximately $250,000 would be required, then to $100,000 to $200,000 per annum could be contributed assuming other revenue sources can be put in place[52].
Philanthropy	Developing the appropriate relationships and business model that	The appropriate governance	Longer term.

[52] Note – Sorell and Glamorgan Spring Bay Councils are yet to confirm this approach and it is dependent upon the acceptance or otherwise of this business case.

INCOME SOURCE	STRENGTH	WEAKNESS	OPPORTUNITY
	allows for philanthropic donations will assist. The governance model proposed has a foundation arm attached to it to seek revenue and funds from a variety of sources including philanthropy.	arrangements including tax deductibility etc would need to be established for the trails. Would require a strong selling position as most philanthropy in Australia tends to be towards medical or arts sectors.	Continue to establish the governance and business models to allow for it. An estimate of $10,000 is applied in the first instance.
Sponsorship	This works well at a number of mountain bike parks. Sponsorship may not appropriate in the reserves that the trail passes through, so any sponsorship approach would be towards the proposed governance entity, bike hire, and / or merchandise and events. Appropriate sponsorship could be undertaken (depending on approvals) from the trailheads.	Difficulty in sponsoring trails on the ground due to policy and regulation matters within the trail area. In tighter economic times, discretional sponsorship from businesses may be harder to come by. Sponsorship would need to be 'appropriate' for use with mountain bikers and trail users.	Strong. Some constraints exist but there are opportunities to develop appropriate off-trail sponsorship. An estimate of $10,000 across all elements of sponsorship is considered reasonable for year 2 onwards.
Trail Use Fees	Applied in many parks through Australia and New Zealand – particularly private parks that need the income for trail operations. Collection of fees for this trail is not recommended – other than donations.	Most revenue collected from reserves in Tasmania is returned to consolidated revenue. This approach makes it more difficult to 'sell' to users who most likely would want to see the trail fees put back into the facilities they are paying for directly.	Moderate. This should be considered in the context of the regional trail pass. Investigations could occur into what may be appliable off trail including the partnership with the reserves. No estimate is provided given the likelihood of the funds being returned in general revenue.
Events and Fees	The Wielangta Forest MTB Trail would be partially suitable to hold events, although these are likely to be cross country events. Events for the entire trail are not aligned with the lack of black diamond downhill trails.	Events need to well-planned and offer riders a strong event experience. Non race events such as family days with free give-aways etc., need to be considered in	Moderate. An event strategy could be prepared aimed at selling the strengths of SE Tasmania, An estimate of $5,000 per annum is provided.

INCOME SOURCE	STRENGTH	WEAKNESS	OPPORTUNITY
		addition to competitive events.	
Merchandise	A good branding strategy that captures the essence of Wielangta and becomes something that not only riders want to associate with, but more broadly outdoor active and the general community. Merchandise can take many forms and include traditional items such as T-shirts as well as a broader range.	Merchandise can be expensive to stock and if it is not market aligned or mis-priced, it can lose money. Bringing in commercial partners to aid with merchandise, or having licencing agreements can help but can also introduce an element of risk if they do not share the same values.	Strong. A branding and merchandise strategy should be undertaken as a first step. An estimate of $10,000 profit is suggested.
Commercial Fees	This is a broad description for a range of services the governance entity may wish to and may be able to undertake. It can include things such as: • Bike Hire • Bike Repairs • Shuttles and transfers • Accommodation and beverage providers near the trail etc. Each needs to be well thought through to ensure that the costs of the service do not outweigh the benefits. Commercial partners can be licensed to operate with a percentage of fees being returned to the trail.	Commercial fees for services are an important mix of fees. They require people to manage and run them and often investment in facilities and equipment. Commercial partners can be licensed to operate but this would need to accord with Tasmanian Government policies and regulations. Revenue raised in this way may have to be returned to the State. Advice will be required.	Strong. Business planning for the trails should identify the highest return options. Assuming all services are provided by the entity, a profit of $10,000 could be reasonable.
Membership	Consideration needs to be made as to whether it is best undertaken at a club level, or a trail.	Only a small percentage of riders are likely to be a member of SEMBA or another club, so a model would need to consider the broader cohort.	Needs further assessment in a business plan. No estimate is provided.
Donations	Donations would need to occur outside the reserves to avoid them going into consolidated revenue. Modern techniques including QR codes to donation pages, GoFundMe sites and other means can be employed.	Donations are notoriously difficult to collect and get meaningful amounts into the revenue streams.	Needs further assessment. Consider doing even if the amounts are small.

INCOME SOURCE	STRENGTH	WEAKNESS	OPPORTUNITY
		It is worth pursuing a donation system as once established, any amount will help.	A modest $5,000 is assumed.
Volunteerism	Volunteerism is a worthy goal, but the reality of the longer trail and premium experience proposed makes this unlikely to be able to achieve significant goals. It is acknowledged that the existing SEMBA volunteers have contributed enormously to the trails proposal.	The current volunteer base is reducing nationally, The trails are not located near a major centre where a source of volunteers can easily be found.	Continue to engage volunteers as a means to help reduce the money required to maintain the trail. Volunteering must be seen as a part but a smaller part of the trails resources.
Other Forms of Revenue	A range of other revenue streams may become available. Good business planning, an entrepreneurial spirit and good governance will work through these options with a mind to the rules that apply to the State land.	The main sources of revenue have been captured in this business case, other forms may not be material or may have higher costs associated with them	Continue to evolve and seek out new ideas and test them before committing.

Summary – potential revenue sources

The following table presents the summary of revenue that is forecast as likely to be achieved. Further business planning will be required by the governing entity to ensure revenue is collected and put towards the cost of trail operations.

Table 26. Summary – potential trail revenue sources

Revenue Type	Description	Estimated Revenue (annual) $2025 Prices
Philanthropy & Donations	Funding from philanthropic organisations or donations from mountain bikers.	$10,000
Sponsorship	From regional tourism organisations or businesses.	$10,000
Events and Fees	Fees charged to event organisers for use of trail	$5000
Merchandise	Profit on sales of branded merchandise	$10,000
Business Operations	Operating entity for the trail could operate trail services – bike hire, shuttle services, food & beverage operations on trail. Profit on operations. Alternative is licensing businesses to operate services on the trail with fees paid.	$10,000
Donations	Small donations from visitors and local trail users	$5,000
	Total Revenue	**$50,000**

Source: TRC estimates 2025

10.2 Operational expenses

Total annual expenses for management and maintenance of the trail are estimated at $250,000 per year (in constant $2025 prices). This primarily comprises maintenance work to maintain the quality and safety of the trail and for some ongoing improvements. It also includes a position to manage the trail and its operations. This leaves a substantial budget gap (around $200,000).

For other trails Councils have:

- taken on the management responsibility by allocating part of a staff position and
- funded maintenance based on the community and tourism benefits of trail use and increased visitation.

Other models have been to partner with mountain bike clubs to use volunteers (with supervision) for trail maintenance as a way of offsetting some costs.

11 Risk analysis

A range of risks present themselves when considering a mountain bike trail project across at least 70 kilometres of land that is managed and owned by multiple agencies, individuals, organisations and is spread across two local government areas.

The following table presents a high level analysis of the risks that can be foreseen and some mitigation strategies that may be available.

Detailed planning assuming the project is approved in principle to get to that stage will identify further and more detailed risks.

Table 27. Table of risks and potential mitigations

RISK	RISK & MITIGATION	RISK RATING AFTER MITIGATION		
		CONSEQUENCE	LIKELIHOOD	RATING
Land manager/owner approval	This is seen as a major risk. The proposed route of the Wielangta Forest MTB trail cross several land tenures, and the land is managed or owned by different agencies (and individuals in the case of private land) Different planning arrangements will be likely across reserves managed by the PWS and the Sustainable Timbers Tasmania managed land. Altering the route to reduce likely conflicts such as Hospital Swamp Nature Reserve (advice is that recreation facilities are not allowed in nature reserves) and avoiding STT land will reduce differing planning complexities and processes.	High. Alternate routes may be required to avoid land where the trail is not appropriate, or the manager will not approve it.	High. Detailed planning will be required in the form of a Reserve Activity Assessment (RAA) (as outlined in this business case) and further planning is required among a range of planning regulations, policies and acts.	High
Alignment alteration due to planning	The strategic plan provides the route and locations of trails. The business case relies on the plan for costing, trail alignment and trail types. Detailed planning should occur prior to construction to ensure the route is planned and known. planning pathways are explained in this business case, and each presents some element of risk and opportunity around the overall route changes. The existing trail is planned to use old trails where ever possible. New trail alignment makes planning more complex.	Possible. Alignment changes, where the project's alignment and deliverables change or expand beyond the initial plan. Trail alignment changes due to planning and land management including natural and cultural assets being potentially	Possible Alignment changes lead to potential loss of experience – a vital element in this proposed trail. Significant redesign may be required. The existing route is planned to utilise existing trails where ever possible.	Moderate

RISK	RISK & MITIGATION	RISK RATING AFTER MITIGATION		
		CONSEQUENCE	LIKELIHOOD	RATING
	Establish a change control and variation process, and regularly review and communicate the scope to stakeholders	impacted by the proposed trails.		
Construction	Having one proponent among the trail partners (Sorell Council is suggested) will reduce construction risk. Conduct a thorough detailed design process and site assessment to guide construction, and have contingency plans for adverse weather, and establish good working relationships with contractors.	Delays and increased costs due to possible factors such as unplanned environmental issues and weather delays.	Likely Construction delays may occur, but good planning and contingency can reduce the impact.	Moderate
Financing	Grant funds and budgets must be known before construction commences to avoid finance risk. Planning approvals and formal consent of land managers must be in place prior to construction commencing to reduce risk. Governance and maintenance models agreed to and put in place prior to construction beginning. Carefully plan and monitor the budget, secure contingency funds, withhold 5% retention monies until end of defects and liability period, and regularly update stakeholders on the financial status of the project.	Less trail constructed, or budget overruns. The consequence of less trail construction is the trail's model is a through trail from Kellevie to Orford. Avoid dropping standards to get more done as this impacts maintenance later on the trail's asset life.	Possible Major infrastructure projects often have cost pressures and finance issues. Good cost control and contingency is critical.	Moderate
Legal	Ensuring the planning approvals and agreements with land managers and land owners is formalised is critical. The trail should not be commenced until the agreements are in place. Council resources may be required. The partnership approach can help prevent some legal issues. A close and respectful relationship with the land managers is critical.	Legal disputes and or litigation are possible but unlikely. A strong partnership approach will see many issues resolved without legal matters arising.	Possible Legal issues can lead to delays.	Moderate
Sustainability	Detailed design should include sustainability criteria and procurement can contain sustainable material sourcing as a criterion for selection of contractors. The trails can be a showcase for modern material and design with	Failure to address community expectations on sustainability and missed opportunity to position the trail in the market.	Possible	Moderate

RISK	RISK & MITIGATION	RISK RATING AFTER MITIGATION		
		CONSEQUENCE	LIKELIHOOD	RATING
	sustainability and Cultural Awareness to the forefront.			
Emergency Management	Significant emergencies can occur. This might include bushfires and east coast low pressure systems causing flood impacts. Significant accidents can also occur. Egress and access points must be maintained along the Wielangta Forest Road into the trail. Helicopter evacuation pads should be considered in detailed design. Well designed, built and maintained trails can offer some resilience to natural disasters. Good governance will mitigate risks to the extent they can be (mountain biking generally is a risky activity). Ensure the trails are graded as per the design guidelines for mountain bike trails so users know what to expect.	Significant. Natural events can and do occur, some damage can be expected that may force the closure of the entire trail for extended periods. Poorly graded or maintained trails can lead to injury.	Considered likely. Natural events do occur. Injuries from rider error and also from trail design can and do occur.	Moderate to High
Marketing and Visitors	Failure to market the trail well may lead to a loss of confidence or lack of knowledge in the opportunity that exists. Branding is important to develop the point of difference and unique selling point for this point to point trail based on the New Zealand Timber Trail model. Less visitors than forecast in the business case could lead to less revenue and the maintenance of the trail	Less visitors could mean less income and less relevance leading to poor maintenance and the MTB trail becoming not relevant.	Not likely. The visitor estimates are conservative. Strong governance of the trail is proposed. Branding and marketing is important.	Low to moderate.
Loss of Partnerships	Partnerships are critical to the success of the trail. Partnerships and agreements with the following will provide important contributions: • Both local governments taking a lead in the governance entity for the trail • Land managers being seen as partners and landlords • Tourism marketing and product development expertise through both Destination Southern Tasmania and East Coast Tourism and Tourism Tasmania • Tasmanian Aboriginal Centre in a self-determined way may	Failure of these relationships and partnerships could lead to loss of expertise and ability to function.	Possible. Strong relationships exist currently and can be built upon. More formal partnership structures including positions on the governance entity can help bring people together.	Moderate.

RISK	RISK & MITIGATION	RISK RATING AFTER MITIGATION		
		CONSEQUENCE	LIKELIHOOD	RATING
	wish to contribute to the project • Private sector investors such as Twamley Farm and Rheban Farm as well as a transport providers, hire bikes, tours, food and beverage etc understanding and willingness to invest in services to support the trail experience. Regular communication and in some cases, having the relevant people on the Board will assist. A strong strategic plan with a vision and aligned objectives can help keep groups working to their strengths in partnerships.			

12Next steps

The following pathway provides guidance to the Councils on how to progress the trail proposal from this concept and business case stage to an operational and nationally significant mountain bike experience. The governance arrangements put in place will confirm and adapt this pathway to meet the changing requirements as the experience development progresses.

Year 1

- Adopt business cases (LGAs)
- Form MOU between Sorell and Glamorgan Spring Bay making Sorell the proponent
- Engage with other partners and land managers regarding the proponent and the approach going forward
- Set a project planning budget to progress the planning

Year 2

- Understand funding opportunities for the trail experience development
- Formalise the project working group
- Consider a New Zealand fact finding mission to undersand in more detail the Timber Trail model
- Seek land manager consent is principle subject to RAA and other planning process
- Undertake detailed route analysis and environmental and cutlural planning to informal consent processes

Year 3

- Seek formal approvals and agreements with land managers
- Formalise environmental and planning approvals
- Formalise funding for construction
- Begin construction of the trail

Year 4

- Continue construction
- Formalise the CLG constitution, arragnements and other ongoing governance arrangements

Ongoing

- Continue operations
- Maintain, grow and evolve the experience

13 Conclusion

The proposed Wielangta Forest Mountain Bike Trail is likely to deliver substantial benefits to the southeast region of Tasmania, and more broadly the state.

The proposal sits well within the existing mountain bike infrastructure, by not duplicating existing parks, but by creating a unique Australian forest ride from Kellevie to Orford. The ride can be undertaken by a range of users and markets with the potential option of staying off the trail in bike friendly accommodation depending on private sector interest.

From a planning and environmental regulation perspective, there are currently no foreseen significant impediments to obtaining planning approvals. Detailed assessment will need to be undertaken including route alignment, a landslip hazard assessment and a natural values assessment report being undertaken. Further, an Aboriginal Heritage Assessment will be required and should involve the Tasmanian Aboriginal Centre. Further, an ecological survey of the proposed route and immediate surrounds should be undertaken for any areas where ground disturbance is or other impact to native vegetation is required.

The proposal is likely to generate significant benefits to the community, the region and the state.

Once operational, total spending in the region by trail users is estimated to increase from $2.068 million in year one of operations to $3.769 million per year in year 10 of operations.

The construction of the trail, estimated at $5 million is likely to generate over 15.8 full time equivalent jobs across the region, generating $1.542 million in direct income.

Trail operations will provide a total of 11.2 full time equivalent jobs in year 1 rising to 20.5 in year 10 of trail operations.

The benefit cost ratio is a health 2.0 at the 7% discount rate (recommended for this type of project) – meaning that for every dollar spent, $2 are returned in benefits.

Governance of the trail is critical, as is the operating model. For this project, the Timber Trail in New Zealand provides the best case study, and a trail experience not yet found in any comparable way in Australia. The governance model provides the longer term legal and regulatory pathway for the trail to succeed and for land managers and owners to have some risk controls in place.

This business case has outlined the risks and opportunities for the trail and experience. While there are significant steps that must be completed before approval can be considered complete, and land managers to authorise access to the land, the prospects of success are strong.

Appendix A – Case Studies

Blue Derby Case Study

Location: Tasmania, located in the town of Derby, approximately 90 minutes from Launceston.

Established: 2015

Trails Over 125kms of trails with an additional 45km of trail in development with 4 private shuttle operators.

Elevation: Sits between 100 and 800 metres.

Events: Hosts national and international competitions including the Enduro World Series (EWS) in 2017 and 2019.

Amenities: The town of Derby supports the amenities including bike hire and retail and repair workshops, shuttle services, pump track, sightseeing tours, cafés, bar, skills coaching and group skills sessions, and a range of tours.

Market: Families, beginners and professional mountain bikers seeking leisure and technical trails.

Visitor Numbers: Approximately 30,000 riders annually with steady year-round attendance due to Tasmania's mild climate and built reputation as a mountain bike destination.

Economic impact: the development of Blue Derby has revitalised the local economy attracting investment and property development including a substantial increase in property values, cafes, accommodation providers and retail stores and the trail network is credited with creating 20-30 new jobs in the local area.

Ownership: Dorset Council maintains the trails which are located on Crown land. Break O Day Council makes an annual contribution of $25,000.

Government Funding: $2.5 million Federal Grant plus $550k from other private project partners enabling early development and other later grants for further improvements.

Operational Management: In 2022 Dorset Council handed over operations to the Blue Derby Foundation with the council retaining management of construction and ongoing maintenance.

Revenue: Blue Derby Trust (merchandise, partners) donations, event income and sponsorships.

Pricing: Free to ride but shuttles can be booked through private operators.

RISK IDENTIFICATION

Financial Risks: The park faces financial risks associated with maintaining its extensive trail network due to its reliance on various revenue streams e.g. merchandise and event profits can vary year to year.

Risks include maintenance costs outpacing income and over reliance on grants and sponsorships from external sources due to a significant portion of funding coming from external sources including variable. Blue Derby Foundation is volunteer base and relies on the energy and connections of its board members that can lead to unpredictable income streams.

Operational Risks: Operational risks include coordination challenges between council and the Blue Derby Foundation, potential for lack of clarity as volunteer directors manage the foundation. Changes in leadership or inconsistent governance could disrupt planning and strategic direction.

Environmental Risks: Soil erosion from heavy use, extreme weather events as experienced with a landslide in 2022 that took out 3 trails and impacted the season opening. Native logging in areas close to the trail network impact on trail experience and potential erosion issues.

Key Points

- Economic Revisitation – bike trails has significantly boosted local and regional economy Trail Network and Events solidifying its reputation as an international MTB destination
- Operational Management transition - Dorset Council transferred operations of Blue Derby to the Foundation, while the Council retains responsibility for trail construction and maintenance
- The Blue Derby Foundation is an independent charity focused on supporting local community development, raising funds for trail maintenance.

Mystic Park, Bright, Victoria

Location: Bright, Victoria approximately 3.5 hours from Melbourne.

Established: 2014

Trails: Over 45kms of trails for all riding styles and abilities from technical cross-country singletrack to gravity fed flow and jump trails.

Elevation: 964m with a 490m vertical drop.

Events: Hosts local and regional events, as well as competitions that attract riders from across Australia.

Amenities: Elevation Parks operate shuttle services.

Market: Families, recreational riders, and professional mountain bikers seeking competitive and leisure riding experiences.

Visitor Numbers: 63,000 annual riders.

Economic impact: $27 million into the local economy.

Ownership: The park operates on Crown land leased to HVP Plantations for timber harvesting. Since July 2024, the MTB Park has been managed by Elevation Parks (previously operated by Alpine Community Plantation ACP a not-for-profit group.

Government Funding: The previous NFP received $1.35m in federal funding for a significant upgrade.

Operational: Alpine Shire Council contracted Elevation Parks in July 2024 to oversee management, operations and maintenance of Mystic Park

Stakeholder Engagement: Mystic MTB engages with key stakeholders HVP and ACP and Bright chamber of commerce and the Alpine Cycling Club to keep the community feel at the park.

Pricing:

- 1 day gravity pass = $100
- Mountain access pass = $15
- Annual mountain pass from $112.

RISK IDENTIFICATION

Financial: Mystic MTB Park relies on visitor numbers, event revenue, and shuttle services. Variability in tourism flows, influenced by weather, economic conditions, or increased competition, could impact income. The park's remote location also makes marketing efforts essential to maintain visibility and attract visitors.

Operational: Operating on Crown land leased to HVP Plantations introduces risks. Rent changes in management from ACP to Elevation Parks may create operational risks.

Environmental: Balancing timber harvesting and recreation poses challenges to visitor satisfaction and trail access. Climate risks are an issue due to the alpine location along with trail degradation from overuse.

Key Points

- Community NFP was not financially sustainable
- Rider contributions and events are core revenues
- Economic Impact value to local economy

Timber trail, New Zealand

An 85km, two-day intermediate mountain bike ride in an economically depressed region of New Zealand.

Background

There were several economic initiatives as part of New Zealand's economic recovery programme after the 2007-8 Global Financial Crisis. One was the NZ Cycle Trail (www.nzcycletrail.com). The idea was to use cycle tourism to economically stimulate depressed rural regions.

The concept was based on the successful Otago Central Rail Trail in the South Island of New Zealand. This is now a 180km, 4-day, easy off-road cycle trail through farm country, using a decommissioned rail line from Middlemarch to Clyde. The trail is for cycling, walking and horse-riding. It was started in 2000 and by 2010 was hosting 10-12,000 multi-day riders a year plus up to 30,000 day riders. It has become the biggest non-farming economic activity in the region.

The success of the Otago trail was due to its originality for New Zealand, the easy trail (grade 1-2) and the role of the private sector in providing trail services such as bike hire, transportation, cafes and accommodation. The initial cafes and accommodations were often in disused shearing quarters, railway stations or old farm or school houses.

The Timber Trail in the Central North Island

The Department of Conservation's concept of an 85km cycle trail through Pureora Forest Park was agreed to in 2010. The trail starts in the old forestry village of Pureora and heads south along disused logging roads through huge mature forests to the farmland and village of Ongarue. The trail is grade 2-3 and is in the remote Pureora Forest Park. New bridges and basic facilities such as toilets and signage were constructed. Total cost was NZ$5 million.

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

The constraint to growth in the markets was accommodation on the trail. Whilst accommodation at the start and end of the trail was developed from old forestry houses, and camping was available along the way, it took time for the private sector to commit to building a lodge. In early 2017, a 50 bed, dedicated trail lodge (the Timber Trail Lodge, www.timbertraillodge.co.nz) was opened at the (almost) halfway point of the trail at Piropiro. Stage One of 10 rooms with shared facilities was followed by 10 ensuite rooms and a licensed restaurant and dedicated cycle touring facilities. The lodge was initiated by local investors who received some financial assistance from the Tourism Growth Partnership Fund. The total Lodge build cost NZ$3.5 million, with the NZ Government grant contributing a third.

More recently a privately owned glamping operation opened in Piropiro, offering a range of accommodation and package options (www.thetimbertrail.nz/campepic).

The accommodation developments complement a range of local transport and bike hire providers and guiding companies. There has also been the rejuvenation of the villages at the start and finish of the trail with the development of cafes and accommodation.

The users of the trail were initially hard-core mountain bikers from the main North Island cities who would do the trip in a day. This market stimulated the growth of the transport providers. The providers also offered transport from the trail at the half-way point to nearby accommodation and this grew the market for a two-day option with accommodation.

The market shifted and expanded to include the older (60-70-year-olds) and family groups. This trend was exacerbated by the growth in popularity of e-bikes. E-bike riders now make up about a third of Timber Trail users. The markets now predominately come from throughout New Zealand and there are now strong emerging markets from Australia and Europe.

Walker numbers on the Timber Trail have also increased and small group company retreats, and social groups are a strong emerging market for the lodge.

The Timber Trail has been incorporated into a major mountain bike event from the top of NZ to the bottom, the Tour of Aotearoa, and it has also been incorporated into the Te Araroa Trail, a 3,000 km walk the length of New Zealand (with approximately 3,500 walkers on the Timber Trail section per annum).

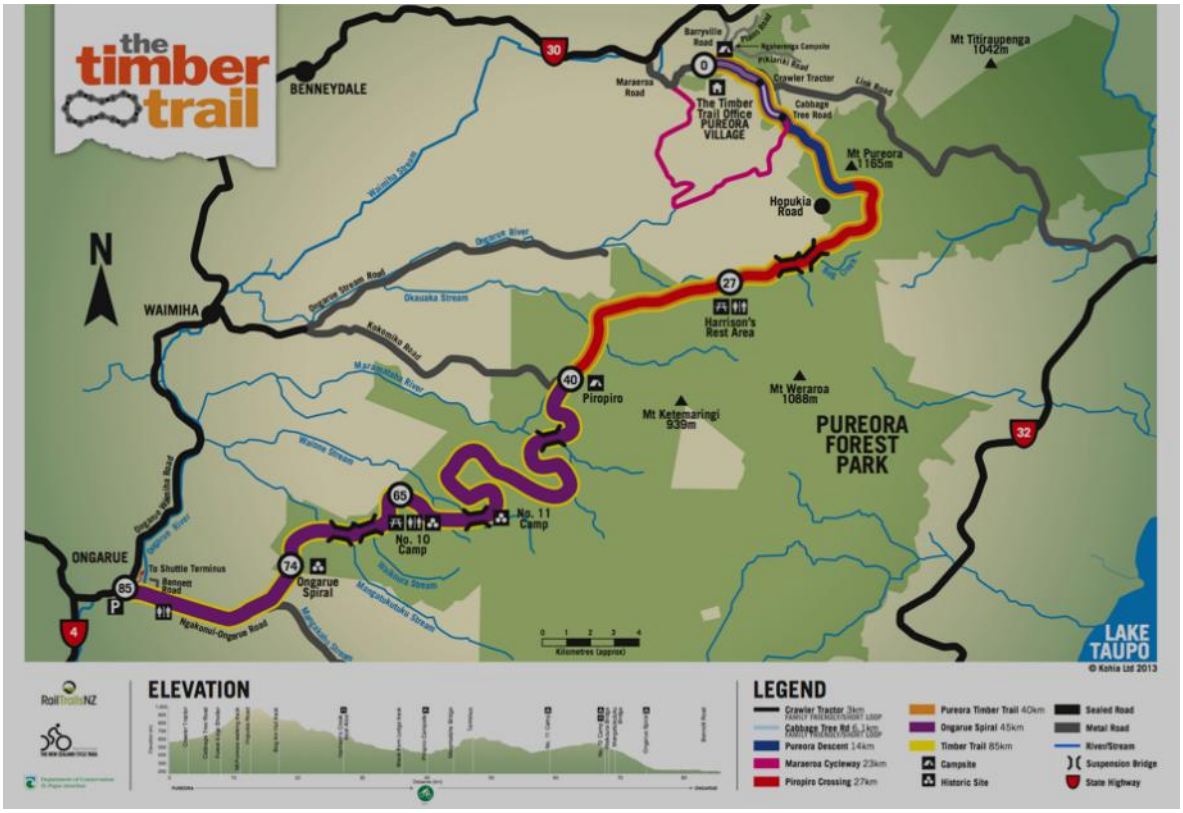
Now more than 10 years old, the Timber Trail is rated one of the country's premier two-day wilderness bike rides, receiving approximately 22,000 riders per annum and injecting more than $7 million a year into the regional economy.

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

The lessons learned from the Timber Trail development include ensuring:

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

Key components that are often overlooked are ongoing maintenance and financial support after natural disasters on the trail. Ongoing collaborative marketing must also be factored in. Separating out the two roles of trail maintenance and trail marketing is being used on the Timber Trail.



Appendix B – Modelling assumptions

Wielangta Forest MTB Trail – Estimating Trail Users

Variable	Description	Sources
1. Trail Locations	**LGAs**	
Wielangta Forest MTB Trail: Kellevie to Orford	Sorell LGA Glamorgan Spring Bay LGA	
2. Trail Users - Local/Regional Residents	**Estimate local users for each trail**	
Local Residents	Estimate of local residents using the trails. Use the trail which is located in or adjacent/in proximity to their LGA. • **Primary Catchment (LGAs):** Sorell & Glamorgan Spring Bay • **Secondary Catchment (LGAs):** Break O Day; Northern Midlands; Southern Midlands; Brighton, Clarence; Hobart	MCa modelling based on population data and likely catchment for trail use
Potential users: persons who cycle in each LGA (primary catchment & secondary catchment)	LGA population 10 years from Tasmanian Govt projections. Population projections examined for 10 years 2026 to 2035. Potential users bike users • Mountain bikers in the LGAs: apply participation rate 2.1% (average for 7 years 2016-2022). For Glamorgan Spring Bay LGA participation rate assumed to be only 1% due to older age structure of population. • Modelling assumes that trail users will mainly be cyclists on MTBs. • Appliers to population at Primary & Secondary LGAs User numbers grow in line with population growth	Tasmanian Government*: Draft medium series population projections for Tasmania* - Treasury population projections 2023 *Ausplay Data Tables, April 2023* <Sports & Recreation Participation> MCa modelling
Likely to use the trail (% of MTB bikers)	Percentage probability assigned to each LGA: 60% of Moutiain Bikers in the primary catchment LGAs (Sorell & Glamorgan Spring Bay); and secondary catchment LGAs: Break O Day (30%); Northern Midlands (40%); Southern Midlands (40%); Brighton (30%); Clarence 30%); Hobart (60%).	MCa assumptions
Average uses per year MTB Trail on users <Based on accessibility of trail increase over time as trail experience becomes known.>	Average uses per year **Primary Catchment (LGAs):** Sorell & Glamorgan Spring Bay**:** Year 1-3 - 5; Year 4- 7 7; Year 8-10 8. **Secondary Catchment LGAs (except Hobart LGA)**: Year 1-3 2; Year 4- 7 3; Year 8-10 4. **Hobart LGA:)**: Year 1-3 6; Year 4- 7 10; Year 8-10 12.	MCa assumptions

Variable	Description	Sources
3. MTB Trail Users – Visitors	**Estimate visitor users for** Wielangta Forest MTB Tail	
Visitors (in trail locations) Sorell & Glamorgan Spring Bay LGAs Visitors	Visitor numbers for each LGA: international overnights; domestic overnights (interstate & intrastate); and day visitors. **Assumed annual growth visitors over 10 years:** International overnights (1%). Domestic overnights (interstate 1% & intrastate 0.5%); and day visitors (0.2%).	TRA Local Government Area Profiles, 2019 • Sorell GA • Glamorgan Spring Bay LGA
Potential users: visitors who may be cycle tourists	Cycle tourists – 21% of visitors in each category. *"Approximately 21% of the Australian adult population have participated in a cycle tourism activity in the past year".* Percentage (21%) applied to projected visitor numbers to each LGA (Sorell & Glamorgan Spring Bay) to estimate the number of tourists who are mountain bikers.	• TRC: Cycle Market Insights note. • Cycle Tourism Insights Sept 2021, Angus & Associates **https://www.mbie.govt.nz/dmsdocument/19860-cycle-tourism-insights-new-zealand-and-australian-summary-september-2021-pdf**
Likely to use the trail during their visit. <% of MTB cycle tourists using trail>	**% of MTB bikers - tourists- Sorrell LGA Tourists** International overnights: Y1-3 30%; y 4-7 40%; Y8-10 50% Domestic overnights: Y1-3 8%; y 4-7 10%; Y8-10 12% Day visitors: Y1-3 1%; Y4-7 2%; Y8-10 3% % using trail increases over time as the trail becomes promoted & known. **% of MTB bikers - tourists- Sorrell LGA Tourists** International overnights: Y1-3 6%; y 4-7 8%; Y8-10 10% Domestic overnights: Y1-3 4%; y 4-7 5%; Y8-10 6% Day visitors: Y1-3 1%; Y4-7 2%; Y8-10 3% The percentage of tourists using trail increases over time as the trail becomes promoted & known.	MCa assumptions
3. MTB User Spending in Region ($2025 prices)		
Local & Regional Trail Users	Average spend: Day visitors: $50 per day; Overnight stays: $150 per day/person	TRA data 2019 for LGAs (Sorell & Glamorgan Spring Bay), updated to 2025 prices
Visitor trail users – day visitors	Trail use is the reason for the visit. Average spending/person based on TRA data for 2 LGAs - averaged. Average spend per day $90/person	TRA data 2019 for LGAs (Sorell & Glamorgan Spring Bay), updated to 2025 prices.
Visitor trail users – international overnights	Average stay associated with trail use: 2 nights. Spending levels per day: $150 /person	MCa assumptions TRA data 2019 for LGAs (Sorell & Glamorgan Spring Bay), updated to 2025 prices.
Visitor trail users – domestic overnights	Average stay associated with trail use: 2 nights. Spending levels per day: $150 /person	MCa assumptions TRA data 2019 for LGAs (Sorell & Glamorgan Spring Bay), updated to 2025 prices >

Variable	Description	Sources
4. Benefits (for benefit cost analysis)		
Regional Income	Increase in regional income generated by users and their spending in the region	Estimates generated from MCa's regional impact model.
Health Benefits	Reduced health costs (public & private) associated with exercise activity and fitness. Based on average trail ride per person of 12kms & health cost saving of **$2.20 per km.** Benefits calculated for local users & domestic visitors. Heath benefits for cycling comprise private health benefits of $1.48 per km cycled; and health system benefits of $0.72 per km (ATAP Guidelines -M4 Active Travel 2023. <ATAP estimate used for local & regional users and domestic visitors riding on the trail. International visitors users not included>	Australian Transport Assessment and Planning Guidelines – M4 Active Travel, Infrastructure and Transport Ministers, July 2023 Page 17 *Mountain Biking in Australia: An Economic and Participation Analysis (AusCycling)*, GHD Advisory, March 2021 MCa assumptions.
Consumer valuation of Trail Experience	Based on a **shadow price of $20 per trail user** ($2025 prices) Indicative valuation for local users & domestic visitors, as no fees charged for trail use.	MCa assumption. Users would be willing to pay $20 if fees were applied.
Productivity Benefit	Exercise improve a person productivity and reduces absenteeism. Assumed that 60% of all trail users are in employment and the benefit is valued at **$7.60 per ride.** Valuation for *local users & domestic visitors*. <Mountain bike estimate used for riding on trail>	*Mountain Biking in Australia: An Economic and Participation Analysis (AusCycling)*, GHD Advisory, March 2021 *Social Value of Community Sport & Recreation - Value Assessment Report,* KPMG 21 October 2021 (for City of Melbourne

Appendix C – Economic Impact Model

The MCa economic impact model is a regional model, which assesses the impacts of a project or new infrastructure on the region in which it is located. The model works in the following way.

It takes estimated visitor spending in the region (net of 10% GST, which is treated as a leakage out of region) and allocates it across a number of industry sectors based on the average spending patterns of visitors.[53] The model takes account that a significant part of this total spending leaks outside of the region (as it comprises inputs into the goods and services sold by local businesses - and these inputs come from outside the region).

- **Direct Jobs**: the model estimates the proportion of this spending by each industry sector and that which represents local value added and income to local employees and income to local business owners. Job numbers are then derived by industry sector using average wages (plus labour on costs) for each sector. The sector jobs generated are then aggregated to get the total direct jobs figure. These jobs are full time equivalent (FTE) jobs and may represent part of job spread across a large number of businesses in the region (rather than additional jobs in a few enterprises in each sector).
- **Indirect Jobs**: these are the jobs generated by the spending of the employees, who are in the direct jobs. The spending of these direct employees is calculated net of both income tax (based on average tax rates) and savings (an average savings rate). The model allocates this spending (net of 10% GST) across industry sectors based on the spending patterns of a local resident (not a visitor).[54] The model then estimates the proportion of this spending by sector that represents incomes to local employees and income to local business owners and job numbers are then derived by industry sector using average wages (plus labour on costs) for each sector. The sector jobs are then aggregated to get the total indirect jobs figure. These jobs are full time equivalent (FTE) jobs and may represent part of a job spread across a large number of businesses in the region (rather than jobs concentrated in a few enterprises in each sector).
- **Regional income**: is the total net income generated from the activity and covers wages and salaries of employees and profits of businesses within the region. It includes income generated directly within the business supplying the services to visitors and indirect income, which is generated in other regional businesses (wages and profits) from the multiplier impacts of employee spending in the region. In the modelling of income generated, income tax and GST on spending, are both treated as leakages from the region.

53 For an overnight visitor this comprises spending on accommodation, food, recreational services, and other retail. For a day visitor this comprises spending on food, recreational services and other retail.

54 The spending pattern of employees is based the ABS CPI 2022 product mix.

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