VICTORIAN MOUNTAIN BIKE STRATEGY

2021

Prepared for AusCycling by Common Ground Trails

AUSCYCLING

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EXECUTIVE SUMMARY

Governments at all levels, peak industry bodies and key stakeholders are recognising the growing popularity of mountain biking and its significant market potential. The Victorian Mountain Bike Strategy was initiated by Mountain Bike Australia (now part of AusCycling) to gain an understanding of current and future demand for mountain bike trails, identify gaps, constraints, and opportunities, and provide strategies to guide future investment in mountain biking in the state.

Funded and supported by Sport and Recreation Victoria, the Strategy sought the views of and consulted with many government agencies including the Department of Environment, Land, Water and Planning, Parks Victoria, Sport and Recreation Victoria and many local government authorities. While these stakeholders contributed to the development of this Strategy, the Strategy is not expressly endorsed by all of these agencies.

PARTICIPATION

Mountain biking as a sport, recreational and adventure tourism activity, continues to grow in popularity throughout Australia and globally. Victoria, like the rest of Australia, has experienced an increase in trail usage and participation in mountain biking. This rapid growth in participation has led to increasing demand for places to ride and quality trail networks to meet the differing needs of all users. Addressing this increased demand presents challenges for land managers, clubs, volunteers and other key stakeholders.

Victoria prides itself on the diverse landscapes and natural beauty, providing a wealth of opportunities for people to engage with nature through a variety of experiences, including mountain biking. Victoria accounts for approximately 21.5% of Australian adults who participate in mountain biking and 19% of AusCycling members who mountain bike. The overwhelming majority of participation in mountain biking by Australian adults in 2020 was informal or non-organised.

Through consultation activities and a range of data sources, an understanding of the demographic profile of mountain bikers, where they ride, what style and type of trails are preferred, was developed. An understanding of participation and riders desire and willingness to travel to mountain bike was also developed.

TRAIL SUPPLY AND DEMAND

In Victoria, there is a high demand for mountain bike facilities within and surrounding major population centres, metropolitan areas and popular tourism destinations.

A number of regional areas already cater for mountain biking and are reaping the associated economic benefits. However, many other regional areas remain largely untapped with ideal topography, terrain, existing infrastructure, services and potential to cater for the demand for recreational and tourism mountain bike experiences. Enhancement of existing trail quality, diversification of trail classification and type, improved accessibility, development of supporting facilities, coupled with effective promotion has the potential to cater for the demand for recreational and tourism mountain bike experiences providing social, environmental and economic benefits to local communities

There is a range of sources available to gather information on mountain biking including, trail location, type, length, classification, maps and supporting infrastructure and services. However, a reliable, publicly available repository of all mountain bike trails and networks in Victoria, does not exist. An understanding of current trail supply was gathered primarily from Trailforks, complemented by research of online resources and consultation with state government agencies, local governments, peak industry organisations and mountain bike clubs.

Victoria has approximately 1,300 kilometres of single track on public and private lands and Alpine Resorts, with the regions of the High Country, Goldfields, and Gippsland containing most of the current trail supply.

GAPS AND TRENDS ANALYSIS

The analysis of existing trails considered tenure, quantity, classifications, styles and diversity, to help identify gaps in supply when compared to demand though Victoria. The gap analysis highlighted the current gaps in participation across the broader community, lack of supply and diversity of adequate trails and infrastructure, and a lack of a consistent framework and coordinated approach to governance and management. Critical gaps identified include:

Gaps in participation in the broader community:

- Lack of diversity in riding cohort and low representation of people from diverse backgrounds, abilities and demographics.
- Lack of centralised participation and trail usage data collection process and reporting portal.
- Underrepresentation of children, youth and females.

Lack of trails, facilities and infrastructure that cater for all abilities and needs:

- Lack of a publicly accessible all-encompassing information portal on mountain bike trail networks.
- Under supply of introductory trail experiences to cater for beginners and build skills and confidence.
- Under supply of black and double black classified trails catering to the needs and abilities of advanced riders.
- Lack of all mountain and gravity trail types.

Lack of tourism product

- Limited single track trail networks suitable for drawing visitation and marketing internationally and nationally.
- Lack of mountain bike visitor and information services.
- Limited locations that could cater for national and international mountain bike events.

Lack of statewide coordination, governance and management:

- A whole of Victoria Government approach to managing mountain biking and mountain bike infrastructure is lacking.
- Lack of a consistent framework and eligibility criteria applied to funding approvals and application processes for mountain bike developments.
- Lack of funding and resourcing for ongoing trail maintenance.

CONSULTATION

A staged consultation process was implemented, utilising a combination of online community surveys and stakeholder liaison to investigate the requirements and aspirations in Victoria. An initial survey was distributed to identify the needs and demand within the wider community. Targeted requests for information were sent to Local Government Authorities and mountain bike clubs. Interviews were conducted with state government agencies, peak industry bodies and where requested, some mountain bike clubs and other key stakeholders. One site investigations were beyond the scope of this Strategy, and for the most part, not possible throughout the course of this Strategy due restrictions related to COVID-19.

STATEWIDE PRIORITISATION FRAMEWORK

One of the aims of this Strategy was to develop a strategic prioritisation framework to guide future mountain bike investment decisions. In order to determine priorities, a Multi-Criteria Analysis (MCA) was developed and applied to every Local Government Area (LGA) in Victoria. LGA's were grouped to align with the Tourism Victoria boundaries current at the time of preparing this Strategy and are referred to as Mountain Bike Regions.

The MCA was an objective assessment utilising industry benchmarks, trail supply information and data gathered through Geographical information System (GIS), the Australian Bureau of Statistics, Tourism Visitation Statistics, and input and findings from consultation activities. The results of the MCA assigned a level of strategic priority for Victorian mountain bike regions.

RECOMMENDATIONS

In order to maximise the benefits, address critical gaps and cater for the growing demand for mountain biking in Victoria, development of significant, diverse and unique opportunities that are supported by existing infrastructure and services should be prioritised. Through the MCA process, the following six regions were assigned with a Very High or High priority and are considered to offer the greatest potential: Yarra Valley and Dandenong Ranges, Victoria's High Country, Gippsland, Melbourne, Goldfields and Geelong and the Bellarine.

Due to the complexity and scale of potential opportunity within each region, it is recommended that strategic regional master planning, including detailed on ground assessments, is undertaken. Regional master plans should identify appropriate parcels of land, land manager support, funding and suitable management models and governance structures for mountain bike development in each priority region.

While some regions have been identified as very high or high priority, it is recommended that a suitable level of planning commence across all regions where possible in the short term. There is an excellent opportunity for the development of key mountain bike destinations in other regions throughout the state which have the potential to provide a range of benefits to regional communities. These regions should be planned and developed in accordance with the recommendations provided in this Strategy. As part of this planning process, existing established trail networks throughout Victoria that already offer excellent recreation and tourism opportunities should be considered for further development and promotion to maximise the social, environmental and economic benefits to the region.

INTRODUCTION

Victoria is renowned for its diversity and beauty, from world class wineries to natural springs, coastal villages, peninsulas, alpine towns, stunning natural areas and thriving, vibrant multi-cultural cities, making it undoubtedly one of Australia's most popular outdoor playgrounds. Offering a diverse range of outdoor experiences, and nature based and eco-tourism adventures, mountain biking is one such activity available in Victoria for both locals and visitors.

Victoria has a range of accessible mountain bike trails and facilities, developed over the years through the efforts and commitment of club volunteers and land managers, providing a variety of off-road riding experiences. However, a growth in participation, and visitation to mountain bike facilities and emerging market trends are placing significant pressure on existing trails and facilities.

More recently, during the COVID-19 pandemic, our connection with the outdoors was never more important as Australia, like the rest of the world adapted to a new 'normal'. During these challenging times visitation to our outdoor spaces and places and participation in activities that immersed us in nature, increased considerably and resulted in a significant spike in usage of trails and trail networks. [1]

Mountain Bike Australia reported a 52.5% increase in membership in the six years to June 2020 and there are no indications of this growth rate slowing.[2] In the nine months to September 2020, recreation membership of Mountain Bike Australia increased across all Australian states and territories, with many first-time members and people new to mountain biking taking out membership.

The continued growth of mountain biking presents both challenges and opportunities for the governing body, land managers, clubs, trail care groups, commercial operators, and other key stakeholders.

Mountain Bike Australia (now part of AusCycling) initiated the Victorian Mountain Bike Strategy in response to the lack of a state-wide strategy to guide the development of mountain biking in the state. A strategic approach to facility development is required to ensure all communities in Victoria can harness the opportunities mountain biking presents and ensure a collaborative and coordinated approach to future investment in mountain biking in the state.

The objectives of this Strategy are to:

- Gain an understanding of existing and projected demand for mountain bike infrastructure.

- Identify gaps in service provision including trails, facilities and infrastructure , participation, events and tourism products.

- Identify constraints, opportunities and potential partnerships in the delivery of mountain bike opportunities, including in regional. Victoria.

- Identify key stakeholder requirements, future plans and opportunities for further planning and development of mountain bike infrastructure.

- Provide strategies and recommendations in key areas such as participation, trails, infrastructure and future planning.

- Develop a prioritisation framework to guide trail investment decisions.

- Provide a high-level document to re-enforce and support future investment decisions and strengthen advocacy for the development of mountain bike trails and supporting infrastructure.

This Strategy will complement any whole of Victorian Government framework or policies for managing the growth and development of mountain biking and application of a consistent approach to mountain bike activities and projects.

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1 Identified by land managers and clubs through consultation conducted to inform this strategy.
2 Mountain Bike Australia, 'Mountain Bike Australia Annual Report 2020', Mountain Bike Australia, Gold Coast, Qld, Mountain Bike Australia, 2020, p.6, https://www.mtba.org.au/about/annual-report/ (accessed 21 June, 2021)

WHAT IS MOUNTAIN BIKING?

Mountain biking is a relatively new activity in Australia compared to other parts of the world. With origins in California in the 1970's, the first mass-produced mountain bike appeared in 1981. The styles of mountain bike riding are as diverse as those who participate in mountain bike riding and is best described as cycling off road on a variety of unsealed surfaces through a range of natural settings.

Historically, mountain bike riders have preferred to ride singletrack trails as this narrow trail offers an intimate connection with nature and enables riders to experience relatively high levels of technical challenge. Maneuvering through purpose built trails with obstacles such as trees, rocks, man-made structures, and other technical features heightens the challenge and difficulty of the trail. To negotiate this terrain and features, mountain bikes are robust, with wide tyres, suspension, and an up-right riding position.

Recently there has been a shift in riding preferences toward flow and gravity style trails providing increased speed and technical difficulty. This shift is partly attributed to advancements in bike technology and capabilities (more suspension, improved bike geometry and design) coupled with an increase in rider skill and capabilities.

WHO ARE MOUNTAIN BIKERS?

Often misrepresented in the wider community as young thrill-seeking males, mountain bike riders are just as diverse as participants in other outdoor recreation activities such as hiking and bush walking. Various studies have been completed into the demographics and profile of mountain bike riders with the outcomes revealing quite a different typical profile.

National research into mountain biking in Australia suggests mountain bike riders are:

- Mostly male, although female participation is increasing
- Between the ages of 30 – 49 years
- Generally, ride a couple of times per week for between 1-2 hours per ride
- Relatively affluent with high household incomes
- Generally, well educated

In recent years, there has been an increase in women participating in mountain biking, particularly for recreation. In addition, the number of mountain bike activities specifically for women, such as skills clinics, social rides, and events, also increased. Often these activities are held at times to suit women with family and work commitments, in a supportive and social environment with an emphasis on participation. Of the total number of responses received to the survey to help inform this Strategy, 58% were from riders aged between 35 and 54 years of age. A summary of the survey results is in the Participation and Demand section of this report.

From an economic and tourism perspective, mountain bike riders are typically high yield, and willing to travel domestically and internationally to experience new trails and participate in events. A recent AusCycling study revealed people who travel interstate for the primary purpose of mountain biking typically do so one or two times per year. Respondents to a survey conducted as part of this study indicated Tasmania was the most popular mountain bike holiday destination followed by Victoria. [3]

3 GHD Advisory, Mountain Biking in Australia: an economic and participation analysis (Brisbane: AusCycling, 2021), p.36.

Credit: AusCycling

TYPES OF MOUNTAIN BIKERS

As outlined in the Australian Mountain Bike Guidelines, below are the different type of mountain bike riders or user groups, the riding experience they seek and their market potential. Further details on each user type including the market motivators can be found in the Planning Hierarchy section of this Strategy.

Credit: Common Ground Trails

LEISURE : THE GENERAL CYCLIST

Leisure mountain bikers are general cyclists of all ages and abilities, with limited skills typically riding infrequently. They prefer highly accessible trails that are close to home with a range of amenities close by. This user group is likely to try mountain biking whilst on holidays.

Credit: Common Ground Trails

ENTHUSIAST : THE RECREATIONAL RIDER

Enthusiast mountain bikers are predominately recreational riders with moderate skills, variable fitness level and ride weekly. This user group is most likely to travel to mountain bike as the primary purpose.

Credit: AusCycling

SPORT : THE COMPETITIVE RACER

Sport riders are competitive mountain bikers who ride regularly, are members of mountain bike clubs and travel to participate in events. They are willing to seek less accessible trails and have a high level of fitness.

Credit: AustralianCycling Holidays

INDEPENDENT : THE ADVENTURER

Independent mountain bike riders are typically skilled outdoor enthusiasts who ride once a week, are technically proficient with a good level of fitness. The adventurous aspect of a ride is more important than the technical challenge.

Credit: Flow Mountain Bike

GRAVITY : THE THRILL SEEKER

Highly skilled technical riders who seek challenging trails, typically ride at least once a week and are often members of a club. This user type seeks specific trails with harder classification.

BENEFITS OF MOUNTAIN BIKING

Mountain biking can deliver environmental, economic, health and social benefits to individuals and communities, providing opportunities for communities and regions in Victoria to leverage these benefits.

ECONOMIC BENEFITS

The economic impacts of mountain biking arise due to spending by riders in proximity to mountain bike trail networks and other spending in the broader region. Visitors from outside a region travelling to mountain bike, including day and overnight visitors, generate significant expenditure on food and beverage, accommodation, value add activities and support services.

A recent study by AusCycling identified that in addition to expenditure at local trails, mountain bike riders also contribute significantly to their local and Australian economy through larger purchases such as new bikes and equipment as well as supporting the Australian tourism industry through intra and interstate mountain bike specific holidays. [4]

Figure 1 below summarises the economic benefits made by mountain bike riders to the local and Australian economy.

The economic contribution of mountain biking to Australia's economy outlined in the above mentioned AusCycling study, is based on AusPlay participation data and annual expenditure estimates. Directly, people who mountain bike at their local trails spend $630.8 million within Australia annually and directly and indirectly support 6,095 full time equivalent employees.

Mountain bike tourism is a growing trend with significant economic benefits for those regions that choose to invest in positioning themselves as a mountain bike destination. There are many examples in Australia where mountain biking has provided economic diversification in towns and regions experiencing decline in traditional industries and populations.

CASE STUDY - TASMANIA

Several states and territories in Australia are investing in dedicated mountain bike and cycle tourism experiences. Tasmania is one of the most notable success stories, with the development of several signature trail developments that have propelled Tasmania onto the world stage of 'must visit' premier mountain bike tourism destinations.

Much of this success can be attributed to an initial investment of just over $3 million to develop the first 85km stage of a mountain bike network in the small rural township of Derby. Formerly home to tin mining and forestry, the area was suffering significant decline. Fast forward seven years, and the town has been transformed and revitalised with a range of new businesses and employment opportunities, and a boom in property prices.

Offering a range of experiences through pristine bushland on the town's doorstep, the 'Blue Derby' mountain bike tourism destination is widely regarded as the mountain bike capital of Australia, with its closest rivals' location across the ditch in New Zealand. In 2017, the Blue Derby trails were voted by professional mountain bikers as the best in the Enduro World Series (EWS) competition. This was the first time a stage of the EWS was held in Australia.

The $3.1 million network is reportedly attracting more than 30,000 visitors every year, who spend four to five nights in Derby then another five nights elsewhere in Tasmania delivering an estimated return on investment of more than $30 million per year from visitation alone.

Blue Derby's success has been a catalyst for several new trail developments across Tasmania including:

- Maydena Bike Park, a privately run gravity focused mountain bike park in Tasmania's Derwent Valley which opened in January 2018

- A 66km network south of St Helens connecting to Blue Tier including the iconic Bay of Fires Descent Trail, opened in November 2019

- Stage 1 and 2 of the $4.1 million, 100 km+, Wild Mersey Mountain Bike Development in the North West of Tasmania, catering for more beginner and family experiences. Wild Mersey is predicted to attract over 138,000 new visitors, and create 51 full time jobs, contributing $6.88 million to the economy.

- Other new trail networks in various stages of construction include the $4.4 million, 105 km George Town Mountain Bike Park in the North East, and the 130 km West Coast Mountain Bike Trail Network in Queenstown and surrounding townships in West Coast of Tasmania. [5]

$27
expenditure per ride

$2,283
annual expenditure per rider

$4,922
annual expenditure on equipment etc

$1,708
Average expenditure on intrastate holidays (per trip)

$2,486
Average expenditure on interstate holidays (per trip)

Figure 1.   Rider Expenditure

4 Ibid., p.46.

5 Ibid., p.26.

ENVIRONMENTAL BENEFITS

Mountain bike riders are renown for the volunteer contribution they make towards trail care and maintenance, with many trail networks in Victoria and throughout Australia the recipient of hundreds of volunteer hours. In addition to this significant contribution mountain bikers make to preserving and caring for the environment, the planned development of mountain bike trails also provides environmental benefits.

On a broad perspective, mountain biking can provide the following environmental benefits:

- Trails increase community ownership and connection with natural areas, creating stewards for long term conservation outcomes.

- Well planned and managed trails that are appropriate to the landscape can preserve and protect the environment, create a sense of place and add value to the area.

- Strategic planning for the development of mountain bike trails catering to user demand can prevent the development of unsanctioned trails in unsuitable environments.

- Passive surveillance provided by trail users can reduce antisocial behaviour and illegal dumping of waste in natural areas.

CASE STUDY - MĀKARA PEAK MOUNTAIN BIKE PARK

Mākara Peak was cleared of native vegetation in the early 1900s and farmed through to the mid 1990s before it was turned into the park it is today. One small remnant of the pre-European forest exists. The 250 hectare Mākara Peak Mountain Bike Park was established in 1988 by the Wellington City Council and is now the largest trail network in lower North Island.

Mākara Peak is classified as a Key Native Ecosystem and is Wellington's first Ministry for Primary Industries certified 'carbon sink' - a forest set aside for atmospheric carbon dioxide absorption. The park provides a safe corridor between neighbouring reserves as well as an important habitat for native birds and other wildlife.

With an 'education through recreation' ethos, the Mākara Peak Mountain Bike Supporters was established with the main goal to restore the park to a healthy, thriving native forest full of native animals. A volunteer group, the Supporters is made up of park users – mountain bikers, runners, walkers, and residents with a passion for Mākara Peak. By encouraging users to become involved with the park developments and restoration, Mākara Peak Mountain Bike Park is an example of how conservation, community, and recreation partners can work together.

With the support of the Wellington and Greater Wellington Regional Councils, this volunteer driven effort managed by Mākara Peak Mountain Bike Supporters encourages park users to learn about and care for their surrounding environment. Supporters assist in a variety of ways including pest animal and plant control, protecting and reintroducing plant species and planting thousands of seedlings.[6]

Tree Planting

The Supporters plant one tree for every metre of new track to offset the impact of bush clearance for track building. With over 35km of hand-built tracks, tens of thousands of trees have been planted since 1996.

Goat Control

In 2000 the Supporters built two fenced areas to exclude goats, pigs and feral livestock. These areas protect a range of planted tree speicies so they can mature and provide a source of seed for dispersal throughout the park.

Plant Diversity

To restore diversity, the Supporters plant important and missing plant species such as kahikatea, miro, matai, rimu, northern rata, tawa, kohekohe and kamahi. These will live for hundreds of years and become important food sources and habitat for native birds, repitles, insects and bats.

Karori Stream

Before 1999 the section of Karori Stream and surrounding land from the main car park south was a weed infested grassland. With the help of grants and thousands of volunteer hours, weeds were cleared and the area was planted out. Follow-up work continues.

Fire Protection

Fires were once common in the hills around Karori. To protect the area as the forest regenerates, the Supporters have been clearing gorse and barberry along the park boundaries and replanting with fire-resistant native trees since 2000.

Pest Control

The Supporters have set up and continue to maintain a large network of poison bait stations and traps across the park to control possums, rats, stoats and weasels. There are over 20 dedicated volunteers who regularly check traps and bait stations.

6 Makara Peak Supporters Inc, Makara Peak Mountain Bike Park [website], https://makarapeak.bike/, (accessed 6 September 2021).

Spending time outdoors and immersion in nature has long been associated with positive mental and physical health benefits. Mountain biking has various social and health benefits, including:

- Improved mental and physical health outcomes which can result in reduced health care costs, and enhanced productivity

- Increased community connection and reduced isolation

- Opportunities for friends and families to be active and socialise together

- Provides an outdoor classroom for children to learn about nature, culture and history while being active

- Is a form of 'green exercise' with research suggesting that undertaking exercise in natural environments results in greater benefits than activity alone.[7]

According to the Victorian Department of Health and Human Services, approximately 3.1 million Victorians are not sufficiently active for health benefits. The *Physical Activity and Exercise Guidelines for Australians* recommends children and young people do at least 30 minutes each day of moderate to vigorous physical activity that makes the heart beat faster. For adults, the recommendation is to be active most days, preferably each day with either 2.5 to 5 hours of moderate intensity physical activity or 1.25 to 2.5 hours of vigorous intensity physical activity such as fast cycling.[8]

Recent AusPlay data indicated that 83% of the Victorian adult population participated in sport or physical exercise at least three times per week in 2020 which is 2% higher than the national benchmark.[9] However, only 35.6% of Victorian adults met Australia's Physical Activity and Sedentary Behaviour Guidelines. 48% of Victorian children participate at least once per week in sport or physical activity organised outside of school hours with 61% participating in only sport related activities and no non-sport related physical activity.[10] Cycling was the fifth most participated in activity by Victorians in the 2020 calendar year.[11]

Physical activity and recreation can contribute to positive mental health outcomes. In economics, this is known as human capital uplift, which is increased cognition, and development skills that improve education and employability outcomes, because of participation in sport and recreation activities such as mountain biking. The human capital uplift benefit nationally is $3,723 million which converts to approximately $252 of human capital uplift per individual who participates in a sport or recreational activity per year.[12]

The individual rider survey conducted as part of developing this Strategy, identified the most common reasons for participating in mountain biking were:

1. Physical health benefits
2. Mental health benefits
3. Challenge, accomplishment, and skill progression

These results are similar to surveys conducted for other studies such as the *Queensland Mountain Bike Strategy*, where respondents identified mental health benefits, social connections and an activity that can family and friends can participate in together as the top three reasons for participating in mountain biking.[13]

Credit: AusCycling

VICTORIA'S POPULATION AND DEMOGRAPHICS

As of 31 March 2021, Victoria's population was 6.648 million, making the state the second most populous state or territory in Australia behind New South Wales. During the period 2018 to 2036, the state's population will increase by an average annual growth rate of 1.5% per annum, reaching an estimated 7.49 million by 2036, and an estimated 11.2 million in 2056.[14]

Within Victoria's regions, the strongest growth is expected in three major Regional Centre LGAs, the cities of Geelong, Ballarat, and Bendigo. These cities will account for around half of all regional growth with Greater Geelong expected to grow by over 100,000 people by 2036. Melbourne is expected to continue to grow strongly across its seven designated Growth Area LGAs. The largest amounts of growth from 2018 to 2036 are expected in the Cities of Wyndham (adding 204,000 people) and Casey (182,000). The fastest rates of growth are expected in the City of Melton (4.3%) and in Mitchell Shire at 4.5%.[15]

These population and demographic projections highlight the potential to increase participation in mountain biking by Victorians and the need to provide mountain bike infrastructure in suitable locations to meet a growing demand.

7 S Dillard, Mountain biking as a means to encourage public health and wellbeing, (Nov, 2017), p.12.
8 Australian Department of Health, Physical Activity and Exercise Guidelines for Australians, [website] https://www.health.gov.au/health-topics/physical-activity-and-exercise/physical-activity-and-exercise-guidelines-for-all-australians, (accessed 7 September 2021).
9 Adult participation data refers to 15+ years old.
10 Children participation data refers to 0-14 years old.
11 Sport Australia, 'Focus on State and Territory Participation', The Clearinghouse for Sport, Canberra, ACT, Author, 2020,p.7, https://www.clearinghouseforsport.gov.au/research/ausplay/results, (accessed 4 September 2021).
12 GHD Advisory, Mountain Biking in Australia, p.24.

13 Common Ground Trails, Queensland Mountain Bike Strategy 2018, (Gold Coast, Mountain Bike Australia 2018), p.21.

14 Australian Bureau of Statistics, National, state and territory population, [website], https://www.abs.gov.au/statistics/people/population/national-state-and-territory-population/latest-release (accessed 5 October 2021).
15 DELWP, Victoria in Future 2019 – population projections 2016 to 2056, (2019), p. 4,5,13.14.

KEY STAKEHOLDER OVERVIEW

In addition to AusCycling, there are many stakeholders in Victoria with a role to play in providing opportunities for mountain biking either as a land manager, funding body, advocacy, tourism, marketing and promotion agency or peak industry organisation.

DEPARTMENT OF ENVIRONMENT, LAND, WATER & PLANNING (DELWP)

The Department of Environment, Land, Water & Planning (DELWP) is the Victorian Government agency responsible for climate change, energy, environment, water, forests, planning and emergency management functions, working to maximise connections between the environment, community, industry, and economy. The Department lists key responsibilities in this area as:

- Ensuring the protection and maintenance of key ecosystems, biodiversity, key habitats
- Securing long-term economic benefits for regional communities
- Providing opportunities for the recreational enjoyment of public lands by all Victorians.

DELWP acknowledges the significant economic, environmental, cultural, and recreational value of the State's public land estate and identifies the following as key organisational priorities.

- Major reforms in the energy, planning and waste sectors
- Implementing Victoria's Climate Change Strategy
- Enabling Aboriginal self-determination
- Improving the health of Victoria's waterways and catchments
- Bushfire management and supporting recovery from natural disasters.[16]

OUTDOORS VICTORIA

Outdoors Victoria is the peak industry body for all outdoor activities in Victoria, supporting the outdoors community to advocate the benefits of outdoor activity to the broader community. Key areas of responsibility include:

- Advocating to all levels of government on behalf of the outdoors sector
- Coordination and delivery of professional learning opportunities
- Guiding efforts to improve and enhance safety and regulations associated with outdoor learning
- Provision of resources for the outdoor learning sector
- Facilitating and supporting research into the outdoors sector
- Providing advice and ongoing work as National Secretariat of the Australian Adventure Activity Standards
- Develop, deliver, and support initiatives and programs that improve the health and wellbeing, and outdoor recreation and education of Victorians.

Outdoors Victoria has a role to play in partnership with key stakeholders to advocate for sustainable and strategically located mountain bike facilities, catering to current and future demand whilst managing environmental and cultural heritage sensitivities.[17]

PARKS VICTORIA

Parks Victoria, a statutory authority of the Victorian Government, is responsible for managing a diverse estate of more than 4 million hectares including 3,000 land and marine parks and reserves making up 18% of Victoria's landmass, 75% of Victoria's wetlands and 70% of Victoria's coastline. Estates managed by Parks Victoria attract more than 100 million visits every year, providing accessible, enjoyable, diverse programs and destinations while protecting and enhancing environmental and cultural values. A primary responsibility of Parks Victoria is to ensure parks are healthy and resilient for current and future generations.[18]

Several of the state's existing mountain bike trail networks are situated on estate managed by Parks Victoria including Lysterfield Park, You Yangs Regional Park and Arthurs Seat State Park.

SPORT AND RECREATION VICTORIA

A branch of the Department of Jobs, Precincts and Regions, Sport and Recreation Victoria's (SRV) primary responsibility includes developing and delivering funding, education, and training programs to support the sport and active recreation sector and community needs.

SRV works collaboratively with not-for-profit, private and government sectors to:

- Improve the health and wellbeing of Victorians
- Build stronger and more connected communities
- Deliver economic growth and jobs
- Enhance liveability.

SRV strives to maximise the economic and social benefits provided to all Victorians by:

- Ensuring greater access and opportunities for participation in sport and recreation for all Victorians
- Maintaining Victoria's reputation as Australia's leading state for sporting and major events (Victoria State Government, 2020)
- Ensuring Victoria continues to be the home of the sport and recreation industries and administration
- Developing and improving the quality of community sport and recreation facilities
- Investing in major sports facilities to support high performance pathways
- Strengthening the capacity of sport and recreation organisations
- Continuing a robust evidence base for activities in the sport and active recreation system
- Reinforcing the enriching role that sport and recreation plays in people's lives.[19]

SRV, provides funding and supports State Sporting Organisations and clubs to develop infrastructure and participation initiatives. In 2020, funding to develop this Strategy was provided to Mountain Bike Australia by Sport and Recreation Victoria's through the Together More Active Program.

16. DELWP, Secretary's message, [website], https://www.delwp.vic.gov.au/corporate-plan/home/secretarys-foreword (accessed 7 September 2021).
17. Outdoors Victoria, About us, [website], https://www.outdoorsvictoria.org.au/about/ (accessed 7 September 2021)

18 Parks Victoria, About us, [website], https://www.parks.vic.gov.au/about-us (accessed 7 September 2021)
19 Victoria (Victoria State Government Department of Jobs Precincts and Regions, 2021) (Department of Environment, Land, Water and Planning, 2021) (Victorian National Parks Association, 2021) State Government, About us [website], https://sport.vic.gov.au/ (accessed 7 September 2021).

TOURISM, EVENTS AND VISITOR ECONOMY

Victoria's Tourism, Events and Visitor Economy (TEVE) is a branch of the Department of Jobs, Precincts and Regions and is responsible for strengthening the profile of tourism and events across government and influencing strategic reforms and economic outcomes for the sector.

TEVE undertakes research and provides policy, strategy and industry development advice to government and industry on the visitor economy. The branch also provides governance support and advice on several entities that market the state, secure events, and manage large scale tourist attractions, precincts, facilities, and entertainment venue in Victoria.[20]

Visit Victoria is the state's tourism marketing and events company responsible for marketing Victoria and securing new business, cultural and sporting events.

Victoria is defined by twelve tourism regions each with a distinct tourism experience and unique brand. The tourism regions current at the time of drafting this Strategy have been used as a basis for defining and assessing existing and potential mountain bike opportunities and are shown in Figure 2 below.[21]

Many of these regions already have a strong focus on mountain biking and mountain bike infrastructure. An example is the Victorian High Country which promotes all cycling opportunities with dedicated branding and a marketing campaign, Ride High Country. Mountain bike trail networks of varying significance levels are located at Mt Beauty, Mt Buller, Dinner Plain, Falls Creek and Bright.
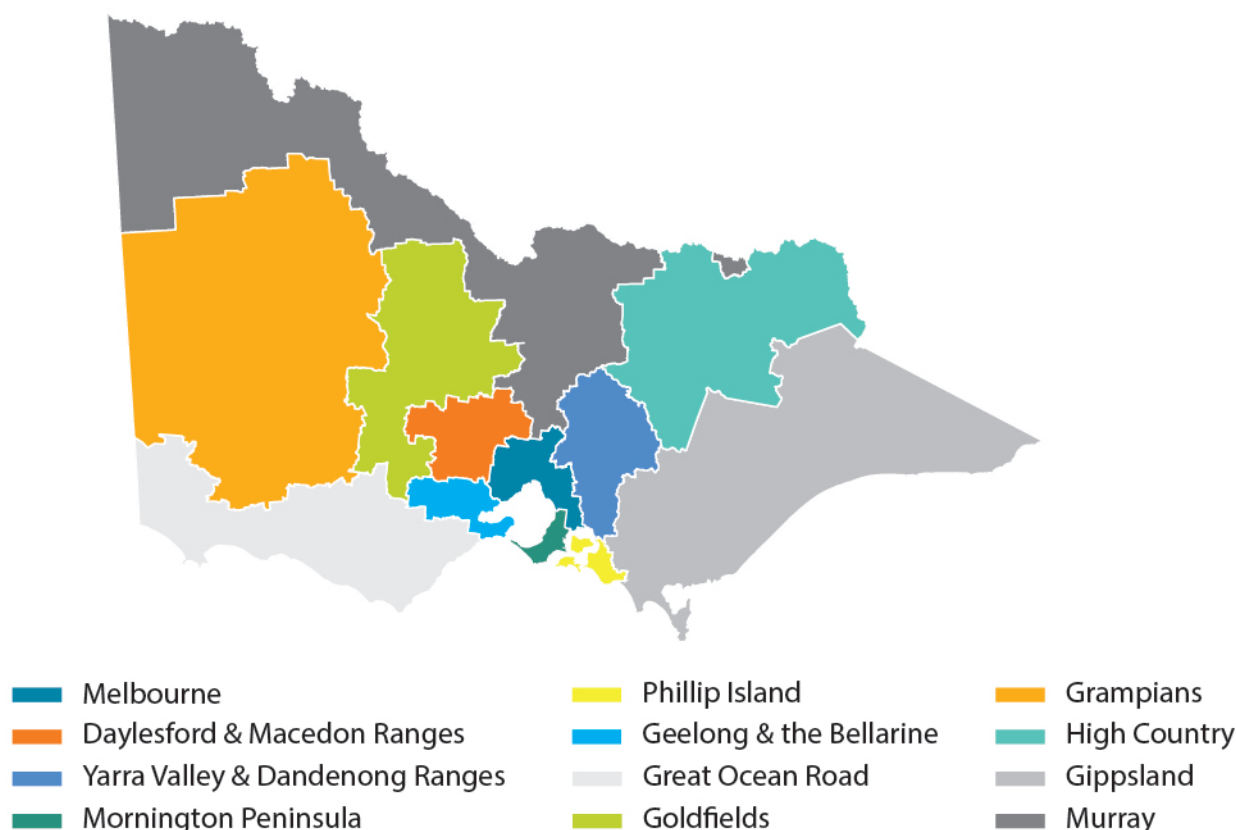
VICTORIAN NATIONAL PARKS ASSOCIATION

The Victorian National Parks Association (VNPA) is an independent member based not for profit association which exists to protect Victoria's unique natural environment and biodiversity through the establishment and effective management of national parks and conservation reserves. VNPA facilitate strategic campaigns and education programs, develop policies, undertake hands-on conservation work, and deliver bushwalking and outdoor activity programs promoting the care and enjoyment of Victoria's natural heritage.[22]

The Association advocates to protect Victoria's national parks and other conservation reserves for future generations while striking a balance between conservation and recreation.

TRADITIONAL OWNERS

It is important to highlight and recognise that Traditional Owners, their connection to Country, and the critical role they play in setting the strategic direction for much of the Crown Land in Victoria where this land is under joint management. As such, any mountain bike directions that are relevant to that land is determined by those communities.

Traditional Owners have a cultural responsibility and lore to protect Country. Tangible and intangible heritage values are legally protected under the Aboriginal Heritage Act and any directions need to ensure protection of the cultural landscape.

Legend:
- Melbourne
- Daylesford & Macedon Ranges
- Yarra Valley & Dandenong Ranges
- Mornington Peninsula
- Phillip Island
- Geelong & the Bellarine
- Great Ocean Road
- Goldfields
- Grampians
- High Country
- Gippsland
- Murray

Figure 2.   Victoria's Tourism Regions

20. Victoria State Government Department of Jobs, Precincts & Regions, Tourism, sports and major events [website], https://djpr.vic.gov.au/what-we-do/events-and-tourism, (accessed 7 September 2021).

21 Business Victoria, The latest tourism data for Victoria's 12 tourism regions [website], https://business.vic.gov.au/business-information/tourism-industry-resources/tourism-industry-research/regional-visitation (accessed 21 June 2021).

22 Victorian National Parks Association, About us, [website], https://vnpa.org.au/about/ (accessed 7 September 2021).

MOUNTAIN BIKING IN VICTORIA

This section draws on available information about mountain biking in Victoria, outcomes of consultation activities, a review of trail supply and demand for places to ride, and membership and participation rates. It also highlights emerging trends, gaps and demand and opportunities to address these to grow mountain bike participation in the state.

STAKEHOLDER AND COMMUNITY CONSULTATION

Consultation with stakeholders was integral to identifying gaps, trends, opportunities and developing recommendations. Several key stakeholders were consulted including those organisations represented on the Project Reference Group, Local Government Authorities, mountain bike clubs, peak industry bodies and the riding community.

The Project Reference Group consisted of representatives from the follow organisations.

- AusCycling
- Department of Environment, Land, Water and Planning
- Outdoors Victoria
- Parks Victoria
- Sport and Recreation Victoria
- Yarra Ranges Council (representing Local Government)

Consultation with the many Traditional Owners throughout the state was not conducted as part of this project. However, consultation with Traditional Owners is necessary and critical to further mountain bike planning, particularly at the regional and local level, and is strongly recommended.

A whole of Victorian Government mountain bike planning and approval framework should make provision for consultation and engagement with Traditional Owners.

A summary of key findings gathered through consultation with key stakeholders and the riding community is presented here. A full list of stakeholders contacted, and responses received are summarised in Appendix 3.

Credit: AusCycling

KEY STAKEHOLDER CONSULTATION FINDINGS

Consultation with key stakeholders was undertaken using a variety of methods including, targeted interviews, online surveys, questionnaires, phone calls and follow up meetings.

Stakeholders were requested to provide information relating to:

- Observed trends in participation
- Construction and use of unsanctioned trails
- Current trail usage
- Current and future planned projects
- Potential opportunities for new mountain bike facilities
- Challenges impacting current and future mountain bike projects
- Aspirational locations for new mountain bike developments

Below is a summary of findings from consultation with key organisations, including those represented on the Project Reference Group, Local Government Authorities, government agencies, peak industry bodies and regional tourism organisations.

Significant Opportunities	There are significant opportunities in Victoria to attract mountain bike tourists by developing iconic and unique mountain bike destinations, supported by appropriate services and infrastructure. The desire to attract domestic mountain bike tourists and revitalise communities in response to the impacts of the COVID-19 pandemic and 2019/2020 bushfires, has been a key driver of trail projects, especially in regional Victoria.
Opportunity to Assess Land Use	There is an opportunity to assess land use in Victoria, particularly as the native timber industry is phased out. Mountain bike trails provide an alternative use and present opportunities to generate economic benefits through tourism.
Increased Participation	In recent years there has been considerable growth in participation in mountain biking and demand for facilities. LGAs in Greater Melbourne, noted a major spike in participation during the COVID-19 restrictions.
Support for Mountain Biking	There is knowledge of mountain biking and the associated benefits throughout most stakeholder organisations with many organisations supportive of mountain biking.
Support for Sustainable Development	There is increasing support for continued sustainable development of mountain bike trails, evidenced by existing policy and planning and a general willingness from organisations and Local Governments to develop mountain bike facilities.
Collaborative Partnerships	In some areas, mountain bike clubs have formed positive and collaborative relationships with land managers to develop and maintain trails.
Resourcing Trail Maintenance	The high maintenance costs and resourcing requirements need to be considered and addressed during the trail development process. Land managers maintenance budgets are often consumed by managing the impacts of unsanctioned trails, leaving very little funds to maintain formalised trails.

Urban Bike Facilities	In highly populated areas, there is limited potential to expand existing or develop new trail networks due to lack of available or suitable land. There is growing interest in urban bike facilities (pump tracks, jump parks and skills parks) to fill this void, offering localised places to ride accessible by bike.
Targeted Advocacy	Local Governments are increasingly advocating for mountain biking and its benefits, developing plans and strategies to harness the environmental, economic, social and health benefits. However, there is a need to continue these efforts and targeted advocacy activities to support new project proposals and plans, ensuring projects have land manager approval and are captured in broader state wide strategies.
Unsanctioned Trails	Land managers are struggling to manage a proliferation of unsanctioned trails. These trails are being constructed without land manager or planning approval(s) or in accordance with the trail development process, and are placing cultural, heritage and environmental values at risk.
Lack of Trail Diversity	There is a lack of diversity in trail type and classification, and a lack of commercial mountain bike developments in Victoria due to legislative constraints on some tenures.
Managing Land Use & Users	Many existing trails are situated on public land including, National Parks. This presents challenges in managing competing recreational uses and demands, and user expectations.
Impact of e-MTB's	In general, there is limited understanding of the impacts of e-mountain bikes (eMTB's), and their impact on participation, trail planning, design and maintenance.

USER GROUP CONSULTATION KEY FINDINGS

Two rider surveys were distributed – one targeting individuals and another for families. Both surveys were tailored to suit the target audience to gather information on demographics, riding habits and preferences, and included an interactive map interface to identify existing and aspirational riding locations. The surveys were distributed through AusCycling and club social media channels, direct enewsletters to members and shared by other organisations. Survey results identified where respondents ride, how often, why they ride, and where they would like to ride if formalised trails were available.

AusCycling affiliated clubs were sent a questionnaire requesting information on regional and local mountain bike strategies, plans, designs, and maps, and where available, participation data. Consultation with clubs identified gaps in trails, suitable locations for facility development and events and details of key partnerships.

World Class Potential	With outdoor recreation and nature-based activities underpinning the regional tourism sector, Victoria has potential to offer multiple iconic, world-class mountain bike experiences.
New Destination Close to Melbourne	Strong community desire for a new iconic mountain bike destination close to the city offering large elevation, catering for recreational riders from Melbourne and attracting the intrastate, interstate and international market.
Growing Demand	There is currently a high and growing demand for mountain bike facilities in the state.
Diversification of Mountain Biking	Growing perception of mountain biking as an activity suitable for families, rather than exclusively for hard-core enthusiasts. There is recognition that the mountain bike user group is diversifying.
Increasing Use of Trails	Trailforks and trail count data indicate trail usage is increasing across multiple trail user groups, in particularly, mountain bike riders.
Lack of Trail Diversity	A current lack of diversity in trail types and classifications.
Consistent Approach to Consultation	There is an overall desire to develop a consistent process and methods of consultation and engagement between clubs and land managers.
Land Manager Champions	The industry needs more 'champions' within the land manager cohort to drive strategic development of mountain bike opportunities and facilities.
Sustainable Trail Maintenance	A sustainable trail maintenance model is lacking with many land managers heavily reliant on volunteer resources.
Opportunity for Localised Facilities	Opportunities exist to provide 'close to home' riding options including entry level (white/green) trails, pump tracks and community participation programs.
Impacts of Electric Mountain Bikes	More information and a greater understanding of the impacts of eMTB's is required to ensure maintenance requirements are catered for.

Diversify Mountain Bike Imagery	Images marketing mountain biking need to be more inclusive and representative of the diversity of riders that make up the community
Lack of Participation Data	Accurate, accessible and consistent participation data for land managers (and wider industry) to use to plan for growing demand is lacking.
Trail Etiquette Education	Better communication of the national trail etiquette for shared use trails is required.
Unsanctioned Trails vs New Trail Projects	Community frustration exists at the closure of unsanctioned trail(s) coupled with the delay in delivering new trail projects to fill the void.

Credit: AusCycling

PARTICIPATION AND DEMAND

Participation in mountain biking is difficult to quantify due to its informal nature and ability to participate outside the confines of traditional structured sport, which inhibits the collection of accurate data. As with other outdoor recreation activities it is challenging for the profile and significance of mountain biking to compete against more traditional regulated sports that require clubs, membership, and structured playing schedules to participate.

Receiving recognition as a national sporting organisation in 2016, Mountain Bike Australia and mountain biking remained unfunded by the Federal Government until unification with other cycling disciplines to form AusCycling, late in 2020. Organised sports have numerous opportunities to collect participation data and membership fees, which can be utilised to secure government and non-government funding for facilities, participation programs, coaching and officiating pathways. There is a need to collect accurate participation data to help raise the profile of mountain biking and cycling more broadly and secure funding for facility development, maintenance, and other initiatives.

Due to the informal nature of mountain biking and the difficulty this poses in terms of data collection, there is a lack of accurate participation data. To quantify participation in mountain biking throughout Australia, in 2020 Mountain Bike Australia commissioned the study *Mountain Biking in Australia- an economic and participation analysis*. This study used a combination of AusPlay data and site surveys at multiple trail networks throughout Australia to gain an understanding of how many people participate in mountain biking. Participation in mountain biking nationally is estimated to be between 73,823 and 837,352. The large range in the participation estimate is due to bias in the results of the survey conducted as part of the study.[23]

Anecdotal evidence including trends towards participation in outdoor recreation in lieu of formal structured sport, suggests that participation in mountain biking in Australia and Victoria is high, however, without an accurate data collection method, participation rates are difficult to estimate.

Visitation to our outdoor spaces and places and participation in activities that immersed us in nature, including mountain biking, increased considerably during COVID-19 restrictions. This increase in participation is mirrored by total bike imports into Australia with imports for FY21 just shy of 1.7M, an increase of 44.3%, up from 1.17M in FY20. Ebike sales are projected to reach 75,000 in FY21 an increase of just over 25,000 on FY20 figures.[24]

An AusPlay report released in June 2021 reports participation in mountain biking in Australia increased by 99,000 participants from 2019 to 2020 with more males than females contributing to this increase.[25]

The AusPlay Mountain Biking Report for 2020 indicates that Victoria accounts for 21.5% of the number of adults participating in mountain biking across Australia which is equal to Queensland and less than New South Wales at 32.4%. Proportionally by population the Australian Capital Territory and Tasmania have the highest adult (over 15 years) participation rate at 2.4%, followed by Northern Territory at 1.7%. Victoria has the second lowest adult participation rate at 1.1%.[26]

It is interesting to note that only 6.6% of Australian adults that participated in mountain biking at least once a year in 2020 did so through an organised activity such as through a club or association, event, or another organisation. The overwhelming majority of participation in mountain biking by Australian adults in 2020 was informal or non-organised.[27]

Given this strong tendency towards informal participation outside of the organised club/ event structure, there is:

- an opportunity to increase AusCycling and club membership
- a need to capture more accurate, reliable, and consistent participation data, including informal participants
- the potential to generate revenue from informal use of trail networks.

Participation data collected through the surveys indicates just over 57% of respondents to the individual rider survey ride 2-3 times per week, while family survey respondents ride together more than once a fortnight. The most popular type of bike owned by individual survey respondents was an All Mountain /Enduro mountain bike followed by Trail and Cross-country. Figure 3 provides a snapshot of participation trends in Victoria.

23 GHD Advisory, Mountain Biking in Australia, p.1.
24 Latz, P, 2021, 'It's Official – 2020/21 was a Record Year for Bicycle Imports', The Micromobility Report, Victoria, Author, 2021, https://micromobilityreport.com.au/micromobility-products/bikes/its-official-2020-21-was-a-record-year-for-bicycle-imports/ (accessed 13 August 2021)

25 Sport Australia, 2021, 'Ongoing impact of COVID-19 on sport and physical activity participation: June 2021 update', The Clearinghouse for Sport, Canberra, ACT, Author, June 2021, p.7, https://www.clearinghouseforsport.gov.au/research/ausplay/results (accessed 21 June 2021)
26 Sport Australia, 'Mountain Biking Report', The Clearinghouse for Sport, Canberra, ACT, Author, 2021, p.5, https://www.clearinghouseforsport.gov.au/research/ausplay/results (accessed 21 June 2021)
27 Ibid., p.6.

32% **30%**

18%

5% 4%

0% 8% 2% 0%

0-12 | 12-17 | 18-24 | 25-34 | 35-44 | 45-54 | 55-64 | 65-74 | 75+

17% **81**%
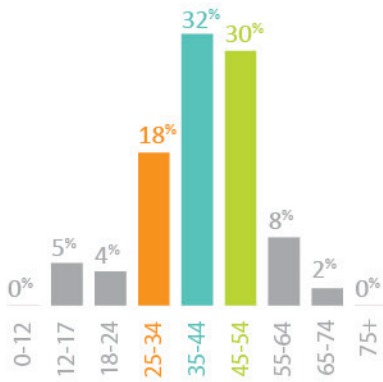
1 % Non binary

1 % Prefer not to say

the trail user survey indicated most Victorian riders are males aged between 25 and 54

a majority of riders considered their technical abilty to be intermediate or advanced

● **4% beginner**

■ **39% intermediate**

◆ **48% advanced**

◆◆ **9% very advanced**

60% With a friend or partner

34% Solo

5% In a large group (>5)
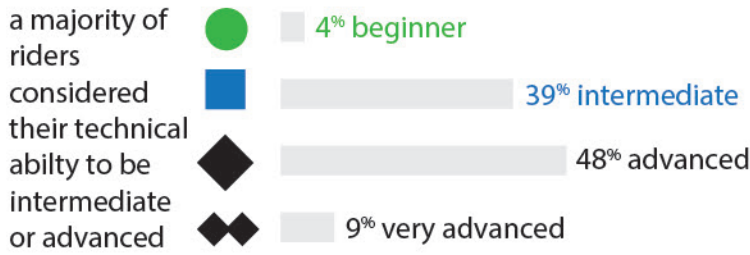
most riders prefer to ride with friend/s or partner in a small group

top 3 reasons why Victorians ride

1 **PHYSICAL HEALTH**
2 **MENTAL HEALTH**
3 **CHALLENGE, ACCOMPLISHMENT & SKILL PROGRESSION**

top 3 barriers preventing Victorians from riding more

1 **TRAILS TOO FAR FROM HOME**
2 **WORK COMMITMENTS**
3 **FAMILY COMMITMENTS**
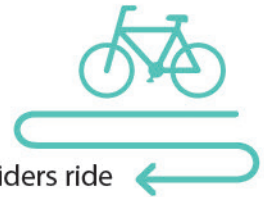
most riders ride

1-3 times a week

in 2019 **6,160** entries were recieved

for **66** competitive events

in 2020 **3,303** riders were a member of a club and

approximately **90,000** riders followed MTB clubs on facebook

82.5%

of Victorian riders (adults) in 2020 participated in MTB informally rather than through organised events, clubs etc.

350k

250k

150k

50k

2016 | 2017 | 2018 | 2019 | 2020
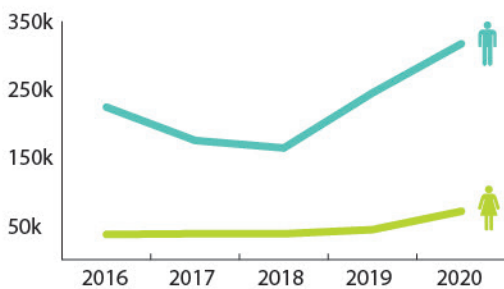
participation in MTB Australia wide has increased significantly since 2016

Victorians account for

21.5%

of adults participating in MTB across Australia

Data sources: trail user survey, AusCycling database, Facebook, AusPlay

Figure 3.   Mountain bike participation trends in Victoria

CLUBS AND MEMBERSHIPS

At the time of preparing this Strategy there were thirty-eight mountain bike clubs affiliated with AusCycling, the national sporting organisation for all disciplines of cycling, including mountain biking. Due to its informal nature, and the ability to participate in mountain biking outside the confines of formal or structured sport, there are many informal groups, bike shops and some unaffiliated clubs that connect people with mountain biking.

Many of these informal groups and their activities are coordinated via social media. Without in-depth investigation, it is difficult to determine the number of informal mountain bike groups and 'shop rides' that exist in Victoria or the number of people participating in these activities.

According to membership data provided by AusCycling, in October 2020, 3,303 Victorians were members of AusCycling, representing 19% of total members and the third highest membership behind New South Wales and Queensland.

It is important to highlight the impact the COVID-19 restrictions had on membership in 2020. Race memberships declined in all states and territories while recreation membership increased. This can be attributed to limited racing and competitive events held during the year. However, as reported earlier in this Strategy, informal participation in mountain biking increased during the COVID-19 pandemic, highlighting opportunities to increase AusCycling and club membership and the growing demand for places to ride. The trend towards participation in outdoor recreation and opportunities to connect with nature to revitalise, reconnect and manage our health and well-being presents an opportunity to leverage participation in mountain biking.

Research undertaken as part of this Strategy and other studies highlight the prevalence for many who ride a mountain bike choosing to not be member of a club or the national body. Several reasons can be attributed to this including the perception that membership is only needed if participating in mountain biking competitively, otherwise there is no benefit.

According to the individual rider survey conducted as part of this Strategy, 37% of respondents were members of a mountain bike club. Due to the survey being predominately distributed via AusCycling and club networks rather than more broadly to the much larger leisure market, the portion of riders who are members is estimated to be lower. Although a smaller market, the enthusiast riders participate more regularly (at least once a week) than the leisure market who may only participate once a year. A greater variety and quantity of trails is required to meet the needs of the regular recreational riders that make up the enthusiast market.

A search on Facebook provided the number of followers for Victorian based cycling clubs that offer mountain biking and/or membership that covers both on and off road disciplines. Noting that people may follow multiple clubs, there are a total of 90,000+ followers of Victorian mountain bike clubs, which when compared to membership data highlights potential opportunities to increase club and national level membership and a greater reflection of participation in mountain biking in the state.

The number of Tasmanians who became members of the national sporting organisation for mountain biking and a club, increased by 21% from 2018 to 2020. This dramatic and significant increase in membership coincides with significant investment by the Tasmanian Government in new mountain bike trail networks and destinations attracting both Tasmanians and interstate and international riders. This highlights the positive impact investment in mountain biking infrastructure has on driving membership.

Rank	Club/Group Name	Facebook Followers
1	You Yangs Mountain Bike Inc	11,316
2	Lysterfield District Trail Riders (LDTR)	10,052
3	Red Hill Riders MTBC	6,724
4	Bendigo Mountain Bike Club	4,832
5	Plenty Gorge MTB	4,290
6	Club Mub Ballarat	4,140
7	St Kilda Cycling Club	3,950
8	Geelong Mountain Bike Club (GMBC)	3,800
9	Surf Coast Mountain Biking Club	3,550
10	Forrest MTB and Cycling Club Inc	3,545
11	Yarra Ranges Mountain Bikers Inc (YRMTB)	3,530
12	Brunswick Cycling Club	3,377
13	Gippsland MTB Inc	3,309
14	Albury Wodonga Mountain Bikers Inc	3,073
15	Alpine Cycling Club (ACC)	2,975
16	Wombat Macedon Mountain Bike Community	2,800
17	Fat Tyre Flyers	2,130
18	Ballarat/Sebastopol Cycling Club	1,964
19	Castlemaine Rocky Riders	1,600
20	Warrnambool Mountain Bike Club Inc	1,496
21	Beechworth Chain Gang	1,446
22	MTB Chicks VIC*	1,400
23	Yack Tracks Inc	1,300
24	Warrandyte Mountain Bike Club	1,300
25	Team Mount Beauty	1,200
26	Coomealla-Mildura Mountainless Bike Club	1,190
27	VOGA Cycle Club	1,039
28	Sunbury Cycling Club*	1,000
29	Wangaratta Cycling Club	1,000
30	Echuca Moama Mountain Bike Club Inc*	942
31	Mansfield Mount Buller Cycling Club	933
32	Gisborne and Surrounds MTB Club (GAS)	681
33	The Fitzroy Revolution MTB Club*	669
34	Ararat Dirt Riders Mountain Bike Club inc	587
35	Dinner Plain Riders (DP Riders)	530
36	Prom Coast Mountain Bike Club	479
37	Lysty Chicks*	409
38	Wombat MTB Club	336
39	Westside Cycling Club*	287
40	Mountain Biking East Gippsland	222
41	Murrindndi Cycle Club Incorporated	50

*Not an AusCycling affiliated club at time of preparing this Strategy

EVENTS

Both competitive and participation events and activities play a vital role in introducing people to mountain biking, increasing membership and creating a sense of community. Mountain Bike Australia's even registration portal indicated that in 2019, 6,160 entries were received for 66 competitive events held in Victoria, 212 people participated in 26 skills clinics and ten level 0 or level 1 skills instructor courses, and one officiating course was held. In addition, clubs hosted numerous group social rides. During the same year, the Oceania Championships, Cyclo-Cross, Downhill, Cross Country and Trials National Championships and several Victorian State rounds across multiple disciplines were held in Victoria.

Restrictions due to the COVID-19 pandemic and the ongoing uncertainty each time restrictions eased, impacted event delivery in 2020/2021, resulting in a low number of events and other participation activities.

It should be noted that not all clubs and coaches used the Mountain Bike Australia or AusCycling event registration portal, therefore other activities not captured above may have been held during 2019 and 2021.

TRAIL USAGE

Although limited trail count data was collected to provide an accurate reflection of trail usage trends, Local Governments Authorities and clubs provided details on trail usage in addition to information gathered from Trailforks. It is important to highlight that Trailforks is a crowd sourced platform therefore it is likely that both sanctioned and unsanctioned trails are listed, and it captures only a portion of riders as not all riders use Trailforks to log their rides.

An analysis of Trailforks data relevant to Victoria revealed the following trends and observations.

1. Trail networks close to major population centres are used most frequently and have high repeat visitation.
2. Four of the top five most visited trail networks were located in the Melbourne tourism region – Yarra Bend Park, Lysterfield Mountain Bike Park, Plenty Gorge and Westerfolds/ Candlebark Park.
3. Mystic Mountain Bike Park in Bright currently has the highest visitation of a trail network located in regional Victoria.
4. The length (km) of a network is not the determining factor in the popularity of a trail network. Sprawling unsanctioned networks were often less popular than well designed and accessible networks, especially if riders must drive to them.

Many LGAs and clubs reported increased usage of trail networks within their jurisdiction over recent years, particularly during the COVID-19 pandemic. Trail count data collected from multiple trails within a trail network located in Greater Melbourne, indicated a 45% average increase in trail passes from 2018 to 2020.[28]

An increased demand for urban bike parks including pump tracks was also noted amongst LGAs. This is consistent with industry trends with many pump tracks recently constructed in Victoria either as standalone facilities or to complement existing bike and skate facilities.

Respondents to the family survey were asked what mountain bike and general bike facilities they would use if they were available in their local area. The top 5 responses were:

- Mountain bike trail networks (31%)
- Share use trails (19%)
- Pump tracks (19%)
- Skills parks (19%)
- Jump parks (10%)

28 GHD Advisory, Mountain Biking in Australia, p.65

MOTIVATORS

Participation programs, strategies, and messaging to engage with a specific demographic group, needs to be built around the core motivators of that audience and address barriers to participation.

Respondents to the family rider survey listed the following as primary reasons for mountain biking with their family:

1 TIME SPENT OUTDOORS CONNECTING WITH NATURE
2 PHYSICAL HEALTH
3 AN ACTIVITY THAT CAN BE DONE TOGETHER

Respondents to the individual rider survey listed the following as the primary motivators for riding a mountain bike:

1 PHYSICAL HEALTH
2 CONNECTION WITH NATURE
3 MENTAL HEALTH

1 PHYSICAL HEALTH
2 MENTAL HEALTH
3 CHALLENGE, ACCOMPLISHMENT & SKILL PROGRESSION

There are some similarities in the reasons why females participate in mountain biking and bush walking. The motivating factor driving female participation in bush walking is, to be outdoors/enjoy nature, which is similar to one of the top motivating factors for participating in mountain biking provided by female respondents to the rider survey.

In recent years, bush walking has seen impressive growth, driven predominantly by females taking up the activity. AusPlay research indicates female participation in bush walking has increased by 68% in the last two years with the peak participation age being 25 – 34 years old. In 2020, there were 214,000 more female participants than male participants in bush walking across Australia. Approximately 5.9% of the Victorian population 15 years and over participate in bush walking.[29]

Analysing the similarities between the motivating factors for female participation in bush walking and mountain biking, there is an opportunity to increase female participation in mountain biking with strategies and messaging focusing on mountain biking's ability to connect participants with nature and immerse oneself in the outdoors, providing mental and physical health benefits.

BARRIERS

To increase participation in mountain biking, it is important to understand the barriers preventing people from participating, including people from diverse backgrounds and across all abilities. Information collected during the consultation process and other relevant research and data, identified several barriers and potential solutions.

Respondents to the family rider survey listed the following as primary barriers:

1 OTHER SPORTS AND INTERESTS
2 MTB FACILITIES TOO FAR AWAY
3 LACK OF PLACES TO LEARN/PRACTICE SKILLS

Respondents to the individual rider survey listed the following as the primary barriers:

1 TRAILS TOO FAR FROM HOME
2 WORK COMMITMENTS
3 FAMILY COMMITMENTS

1 TRAILS TOO FAR FROM HOME
2 WORK COMMITMENTS
3 LACK OF TIME

Other barriers raised by female respondents include, nearby trails were not the type of trail they prefer to ride and not being confident riding alone. The lack of confidence to ride alone could be attributed to multiple reasons which were not explored within the scope of this Strategy.

The rider survey, membership and event participation data and other information sources clearly indicated females are underrepresented in mountain biking.

Addressing any one barrier in isolation will not necessarily result in an increase in participation in mountain biking by women. It is likely that multiple barriers need to be overcome to encourage women who already participate in mountain biking to participate more often and encourage those not participating to do so. This may be a combination of more accessible and appropriate trail types, skill development and bike maintenance programs, and social riding programs scheduled at times to suit work and family commitments.

It is recommended that further research be conducted to understand the barriers preventing those not already riding a mountain bike from doing so, with a particular focus on members of the community across all forms of diversity.

29 Sport Australia, 'Bush Walking Report', The Clearinghouse for Sport, Canberra, ACT, Author, 2021, p.2, 5. https://www.clearinghouseforsport.gov.au/research/ausplay/results (accessed 21 June 2021) (Sport Australia, 2021) (Sport Australia, 2020)

Pre COVID data suggests there is a low participation rate in mountain biking amongst children. AusPlay data indicates the most popular participation activities for Victorian males aged 14 years and under are swimming, AFL and basketball and for females, swimming, recreational dancing and netball.[30]   While membership statistics from MTBA's 2020 Annual Report shows 33% of Victorian members were aged 18 years and under, with 16% female. [31]

Results from the family survey indicated:

- 75% of children had not participated in coaching programs
- 75% of children were not members of a club
- 61% of children had never participated in an event.

There are likely many reasons why formal participation in mountain biking by younger Victorians is not greater. One reason is the need to travel by car to access most mountain bike networks which is a significant barrier to children unless their parent or carer also rides.

Many LGAs reported challenges the construction of unsanctioned trails, many close to residential areas. Small local trail networks, pump tracks and urban bike parks within proximity to home and easily accessible by bike can provide opportunities for all members of the community to ride without the need to drive and can potentially decrease the building of unsanctioned trails. These types of facilities also allow those that are 'time poor', the opportunity to ride before or after work helping to ensure Victorian's meet the recommended daily physical activity requirements.

Schools offer great potential as a way of introducing children to mountain biking and riding a bike in general. Ride Nation Schools program is AusCycling's national bike education program. AusCycling describe the program as a fun and interactive learning experience that teaches young people to develop their riding skills and confidence – supporting kids in their independence and giving parents peace of mind.[32]

A three tiered program, Ride Nation Schools begins with teaching the foundation skills of riding a bike in a traffic free environment, progressing to developing competencies and building confidence relevant to low traffic situations such as shared paths, bike paths and quite streets. The third tier Explore Places combines and extends the learning from the skills and confidence programs focusing on riding within the community and exploring cycling opportunities in the local community.

Although not a mountain bike specific program, Ride Nation Schools provides the opportunity to establish lifelong healthy and active habits in young people and introduce them to mountain bike riding. Ride Nation Schools presents an opportunity to work alongside participant schools and local government to develop infrastructure such as local trail networks, pump tracks and urban bike parks, accessible for young people and incorporated into the delivery of Ride Nation Schools program.

Several clubs in Victoria deliver successful junior mountain bike skill programs and events aimed at developing skills and introducing young riders to competition while remaining fun and social.

CASE STUDY - BEECHWORTH CHAIN GANG JUNIOR PROGRAM

Commencing in 2015, the Beechworth Chain Gang (BCG) Junior Ride Program is an example of a successful club led skill development program. An initiative of a group of local mountain biking parents keen to get their children riding together for fun and teach them some basic bike handling skills, soon generated much interested from the community which led to the activity becoming formalised in 2015 under the auspices of the BCG.

Since its inception, an estimated 120 children have progressed through the program with many returning year after year to continue to develop their skills, make new friends and nurture existing friendships. Designed for children aged 5 – 11 years, the Junior Ride Program assists children with very little mountain bike experience and equips them with the skills and confidence required to enjoy mountain biking. The program is delivered by accredited volunteer level 0 and level 1 mountain bike skill instructors all of whom are club members.

In 2021, the Junior Ride Program was expanded to include a Youth and an Adult Ride Program, providing similar opportunities for riders of all ages.[33]

Credit: AusCycling

30 Sport Australia, 'Focus on State and Territory Participation', The Clearinghouse for Sport, Canberra, ACT, Author, (Beechworth Chain Gang, 2021) (AusCycling, 2020) (Department Environment, Land, Water and Planning, 2017) (Regional Development Victoria, 2020) (Colac Otway Shire Council, 2021)2020, p.13 https://www.clearinghouseforsport.gov.au/research/ausplay/results (accessed 21 June 2021)
31 Mountain Bike Australia, Mountain Bike Australia Annual Report 2020', p.7.
32 AusCycling, Ride Nation Schools is our national bike education program [website], https://www.ridenation.com.au/ (accessed 10 September 2021).
33 Beechworth Chain Gang, Rider development programs [website], https://beechworthchaingang.com.au/ (accessed 10 September 2021).

ACCESS

In addition to specific barriers to participation, accessibility of trail networks is also a barrier impacting on people's ability to ride, the frequency they ride, and the development of mountain biking opportunities. This can be attributed to the incompatibility of mountain biking with land and some conservation values, competing land uses, lack of supporting policy and plans or lack of advocacy.

There is a demand for mountain bike facilities in major population centres which presents challenges for all levels of government. The challenge for land managers is to cater for all mountain bike user groups and other recreational users in an equitable and sustainable manner in consideration of conservation, environmental and cultural values.

All land managers reported challenges with unsanctioned trails and an increase in the frequency and amount of unsanctioned trail building occurring within their boundaries and estates. The construction of unsanctioned trails can cause significant damage to the environment and areas of cultural significance. This increase in unsanctioned trail development could be viewed as an indicator of demand for localised trail networks. Facilities such as small local trail networks, pump tracks and urban bike parks are well suited to urban areas and are easily accessible to a large population. Local trails providing for local communities and younger generations will introduce more people to mountain biking and assist to develop a lifelong association with mountain biking, healthy lifestyles and fuel a desire to want to travel beyond their local area to mountain bike tourism destinations.

A recent shift in rider preference towards flow and gravity style trails that provide for increased levels of speed and technical features can be attributed to an increase in the capabilities of the mountain bikes along with an increase in rider skill and capabilities. Flow trails can cater to all skill levels with many technical features rollable or avoidable. Addressing the demand for more variety in trail types and more advanced technical trails is restricted by

limited availability and accessibility of suitable trail networks and/or land.

In response to the question 'what trails you do have/ would you like close to your home', the majority of respondents indicated cross country trails were close to home. However, the preference was for All Mountain/Enduro trails followed by Flow trails. This re-enforces the shift in rider preference and demand for more gravity and flow style trails.

Seventy five percent of individual rider survey respondents travel 30 minutes or less to their local trail network (sanctioned or unsanctioned) and travel up to 2 hours for a day trip to mountain bike.

The shift away from traditional structured sport to outdoor recreation and informal participation in Australia has been occurring for many decades. Today, many Australians are time poor with 1 in 10 employees working 50 hours or more per week, which is considered 'very long hours' by the Organisation for Economic Co-operation and Development (OECD). Australians work more hours than most people in other developed OECD countries.[34]

Working long hours can impact on time available to look after our health and wellbeing, reduces time available for leisure and physical activities and increase levels of stress. Access to localised trail networks and urban bike park facilities such as pump tracks, jump and skills parks provide the opportunity for people to participate in mountain biking and bike related physical activity close to home before or after work and other commitments, without the need to travel for long periods.

Access to mountain bike trails and natural areas should be inclusive for people of all abilities, providing opportunities to experience the outdoors and participate in mountain biking. *The Australian Adaptive Mountain Biking Guidelines* provide guidance, knowledge and the tools for land managers, clubs and other stakeholders to incorporate accessible infrastructure and adaptive mountain bike trails into trail developments. The new trail network under development at Creswick has been planned to be accessible for people with a disability with 30% of the trail network to be suitable for adaptive mountain bikes and complemented by accessible parking, toilets, and high contrast signage.
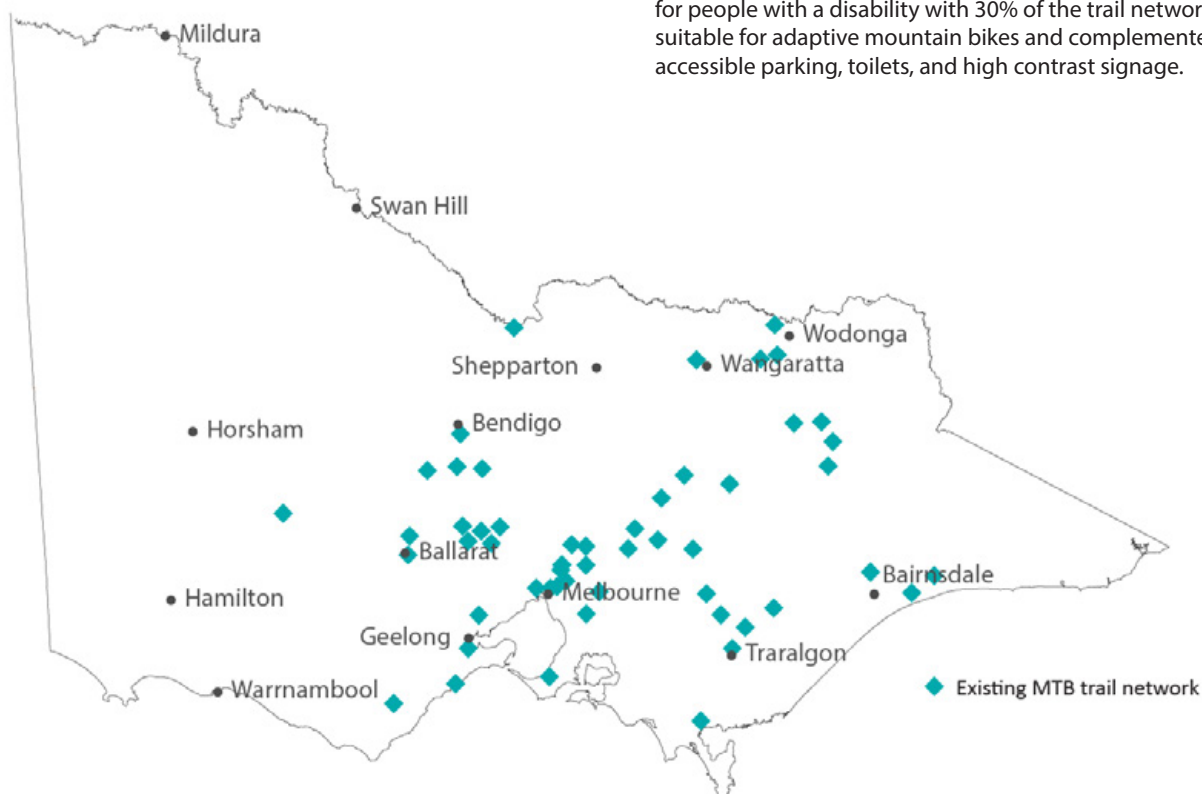

Figure 4.   Existing mountain bike trail networks

34 Health Direct Australia, Health Direct [website], https://www.healthdirect.gov.au/work-life-balance (accessed 27 August 2021).

GAPS IN PARTICIPATION AND DEMAND AND DESIRED IMPROVEMENTS

The following is a summary of the gaps in participation and demand discussed throughout this Strategy, as well as desired improvements which form part of the broader recommendations.

PARTICIPATION & DEMAND

Issue	Gap	Desired Improvements
Participation Data	There is limited consistent and accurate data on participation and trends in mountain biking. Not all who ride a mountain bike are a member of a formal club or AusCycling, and not all trail networks collect trail usage data.	Establish a method of quantifying and collating participation rates in mountain biking, storage of this data and its availability to assist industry to make informed investment decisions.
Participation Rates	Available research and data indicate participation in mountain biking is continuing to grow. Increased participation will drive the demand for trails and places to ride.	Review industry developments and survey the riding community regularly to stay abreast of trends influencing participation.
Participation by People from Diverse Backgrounds, Abilities & Demographics	One of the key issues identified through consultation and research was the low representation of people from diverse backgrounds, abilities, and demographics – including women, people with a disability and people from cultural and linguistically diverse backgrounds.	Identify barriers to participation by people from diverse backgrounds and communities with the view to developing and delivering market specific programs providing opportunities for sustained participation in mountain biking. Support AusCycling's Ride Nation program including the national learn to ride program Ride Nation Schools Program, as the national participation pathway framework.
Youth Participation	One of the key issues identified through data and consultation was the low representation of children in mountain biking.	Build on opportunities provided by AusCycling's Ride Nation Schools program to introduce young people to cycling and more specifically, mountain biking. Leverage the opportunity Ride Nation Schools to work alongside participant schools and local government to develop infrastructure such as local trail networks, pump tracks and urban bike parks, accessible for young people and incorporated into the delivery of Ride Nation Schools program.
Demand	The most popular trail networks have experienced a rapid increase in usage, in recent years, particularly during the COVID19 pandemic. This increased usage is presenting several management and maintenance challenges for land managers. Survey respondents indicated trails are generally a 30 minute or less drive from home. However, the trail networks do not provide the preferred type of trail or riding experience the majority of riders are seeking.	Provide purpose-built trails in strategic locations to service areas with high recreational demand and visitation, with a focus on addressing significant gaps in the market, alleviating pressure on existing facilities and meeting future growth and market trends.
Access	With less time available for structured sport, and a shift towards informal participation and outdoor recreation activities, there is a need for more local riding opportunities to cater for demand. There is a growing trend and need to provide trail networks for people of all abilities and adaptive mountain biking.	Encourage and support the development of local trail networks and urban bike park facilities providing opportunities for children, youth and the 'time poor' to participate in mountain biking.

TOURISM

According to the report, *Protecting Victoria's Environment – Biodiversity 2037*, Victoria's natural environment is the state's biggest asset. In terms of tourism benefits, $1.4 billion in spending per year is associated with visits by tourists to Victoria's parks, generating $1 billion gross value added to the state economy and 14,000 jobs.[35]

Victoria is considered a leader nationally in the visitor economy. The industry contributes significantly to Victoria's economy, with $32.5 billion in visitor expenditure in 2019. The economic impact of the COVID-19 pandemic on tourism and visitor economy in Victoria is severe and the recovery trajectory remains uncertain.[36]

Several challenges facing the recovery of Victoria's tourism industry have been identified by the Department of Jobs, Precincts and Regions.

1. Growing competition - There is increased competition from other Australian destinations for visitor spend in the immediate term, and this will be followed by international competitors in the future. Australian destinations have invested significantly over several years to develop new tourism offerings and have developed distinctive brands that resonate with visitors. Victoria's response requires immediate efforts to build a strong pipeline of demand-driving infrastructure to increase the supply of high-quality tourism products. Marketing activity will need to be uplifted and re-imagined to cut through a crowded marketing landscape. Victoria will also face a highly competitive market for major events, regional events, and business events. This is because other jurisdictions will also seek to propel their events industries out of the hibernation, they also experienced during 2020.

2. Leveraging and supporting Melbourne - Melbourne plays an important role in the visitor economy. It is a key interstate and international brand for Victoria, and a stepping-stone for visitors to regional Victoria. There is an opportunity to refresh the city experience, and particularly to adapt to a COVIDSafe world. Melbourne's branding incorporates diverse and authentic experiences throughout the city, which will need to adhere to COVIDSafe principles. Supporting major and business events is also a priority to drive recovery. These events are a major part of the Victorian brand and attract many interstate and international travellers.

Victoria's *Visitor Economy Recovery and Reform Plan* to be delivered by government and industry working together, will ensure the tourism and events sector recovers strongly in the wake of the 2020 bushfires and the global pandemic. The plan focuses on supply (products and infrastructure, and industry strengthening) and demand (destination marketing and events) pillars and core enablers (strategic collaboration and planning, and data and insights) of the visitor economy.[37]

Investing in mountain bike trails, supporting infrastructure, branding, and marketing and business growth aligns with the key themes and objectives of the Reform Plan. The Victorian Government has recently invested in several mountain bike specific projects in 2020, via round one of the Regional Tourism

Investment Fund, designed to help the tourism sector recover, drive visitation, and create jobs. Projects that received funding include:

- Hammon Park Trail Head and Bike Park, Creswick
- Haunted Hills Mountain Bike Stage 2, Latrobe Valley
- Goldfields Track Transformation Stage 1, Ballarat to Bendigo
- Mt Buller Mountain Bike Trails, Mt Buller

Other off-road cycling/ shared use trail projects were also funded as listed below.

- Murray River Adventure Trail
- Prosecco Road Trail, Wangaratta
- Blue Gums to Eildon Rail Trail, Alexandra
- Great Victorian Rail Trail Art Installation and Signage
- Bonegilla Migrant Experience and Rail Trail, Lake Hume/ Wodonga
- Yarra Trail Northern Loop[38]

In addition to a mountain bike riders' primary motivator(s) for riding and travelling to mountain bike, there are several core experiences that are recognised as being key drivers to encourage visitation to Victoria and regions within the state. Alignment of planning for future and upgraded mountain bike facilities with the Victorian Tourism Regions and the relevant experiences will ensure a coordinated approach to marketing and promotion and one that leverages off other attractions in the region.

Events have the potential to provide significant economic benefits to townships and regions and raise the profile of mountain bike destinations. Victoria has hosted numerous National mountain bike events over recent years including National Cross Country, Downhill and Trials Championships in 2014, 2015, 2016, 2019 and 2020, National Cyclo-cross Rounds and Championships and the Oceania Cross Country and Downhill Championships in 2020.

MOUNTAIN BIKE TOURISM

Mountain biking has traditionally been a competitive or recreational activity. However, in recent years there has been a rapidly growing trend towards mountain bike tourism. Mountain bike trails have the potential to harness the domestic and international visitor markets. In Victoria, there is significant opportunity to leverage the existing supply of mountain bike trails which have been built through many years of volunteer and community efforts. Refreshing some of these networks and promoting their tourism potential could drive regional visitation and deliver economic benefits to communities.

Tasmania offers many significant mountain bike destinations including Derby, Maydena, Wild Mersey and St Helens with yet to be completed mountain bike networks in George Town and the West Coast set to add to the list of significant mountain bike destinations in the state. Interestingly, all these trail networks were built or are being built by professional trail builders and are backed by strong governance, management and maintenance frameworks. These regionally based destinations are complemented by supporting infrastructure and services such as cafes and other food outlets, breweries, a range of accommodation options, bike shops and shuttles services. In addition, Hobart and Launceston provide multiple additional ride locations easily accessible from the CBD. It is no surprise that a market survey of Australian mountain bike riders conducted in 2020, as part

35 DEWLP, Protecting Victoria's Environment- Biodiversity 2037, (Melbourne, Vic, Victoria State Government, 2017), p.5.
36 DJPR, 2021, 'Visitor Economy Recovery and Reform Plan', Melbourne, Vic, Victoria State Government, 2021, https://djpr.vic.gov.au/significant-projects/visitor-economy-recovery-and-reform-plan (accessed 23 August 2021).
37 Ibid.

38 Regional Development Victoria, Funded projects [website], https://www.rdv.vic.gov.au/grants-and-programs/funded-projects (accessed 23 August 2021).

of AusCycling's, *Mountain Biking in Australia: an economic and participation analysis* study, identified Tasmania as the most popular state for mountain bike related travel followed by Victoria.

Victoria has the potential to increase its share of the mountain bike riders who travel specifically to mountain bike through refreshing existing and developing new trail experiences combined with targeted marketing and tourism campaigns. With the phasing out of the native forestry industry, there is potential for mountain biking infrastructure to offset job losses in regional Victoria and generate economic benefits. To do this, it is essential to understand the factors that make a mountain bike destination a success.

CASE STUDY - FORREST MOUNTAIN BIKE REVITALISATION PROGRAM

Situated in the breathtaking scenery of the Great Otway National Park, the Forrest Mountain Bike Trails offer over 65km's of single track weaving through diverse landscape of tall eucalypts, native bush and magical fern gullies. Forrest has a long standing reputation as one of Australia's first mountain bike destinations with mountain bike trails established in 2005 at the end of logging in the Otways. Mountain biking and mountain bike tourism were recognised as having the potential to provide economic benefits to a region reliant on logging for many years. The Trails are home to one of Australia's iconic mountain bike events, the Otway Odyssey Mountain Bike Marathon and more recently, the Great Otway Gravel Grind.

With more and more iconic mountain bike destinations on offer in Australia and overseas, all seeking to attract mountain bike tourists, a need to revitalise the Forrest Mountain Bike Trails and supporting infrastructure to maintain a share of the market was identified. Stage one of the Forrest Mountain Bike Revitalisation Project is jointly funded by the Colac Otway Shire Council and the Victorian Government via DEWLP and Regional Development Victoria. Stage one will deliver new trail products, upgrades to existing trails and significant upgrades to the southern trailhead incorporating a skills/ jump park and pump track.[39]

Mountain biking can be the primary motivator for travel or an activity that is undertaken whilst visiting an area for another primary purpose. Factors that determine a successful mountain bike destination are influenced by the needs and motivators of the user group the trail network is targeting. Recreational mountain bike riders seek out high quality trails in scenic locations. Victoria's diverse landscapes, scenic beauty and existing nature based, and eco-tourism attractions provide the state with the solid foundations to leverage opportunities mountain bike tourism offers.

Successful mountain bike tourism destinations must be developed to an appropriate scale and level of significance. Establishing the scale and level of a mountain bike facility is part of the Trail Development process as detailed in the *Australian Mountain Bike Trail Guidelines*.

Nationally significant mountain bike facilities capture the mountain bike market for at least a week of unique riding opportunities. They service large population centres and should be developed to cater for international, inter and intrastate tourism as a priority.

A regionally significant facility caters for short breaks or weekend trips and services a small population centre or large community and/or tourism resource. A regionally significant facility should be developed primarily to capture inter and intrastate tourism use and community based trail use.

Regions aspiring to develop mountain bike tourism should ensure the following are considered and adequately planned for:

- Mountain bike specific product – trails and infrastructure, supporting services and infrastructure
- High quality, diverse, scenic, and iconic trail experiences
- Marketing and promotion – unique brand, experience packaging
- Events – participation and competitive (national, state and club level)
- Visitation and accessibility, accommodation, attractions, and activities
- Revenue generation
- Management and maintenance models (including funding)
- A positive destination image
- Partnerships and political support

Further detail on the levels of significance is provided in the Planning Hierarchy section of this Strategy.

In terms of Victoria and responses received from the individual and family surveys, the top 3 mountain bike destinations for family mountain bike holidays were:

- Bright, Victoria
- Derby, Tasmania
- Forrest, Victoria

The key factors when choosing a family mountain bike holiday destination were:

- Great and quality trails
- Something for everyone, including non-riders
- Camping facilities

In terms of Victoria, and responses to the individual rider survey:

- 71% of respondents are willing to travel up to 2 hours from home for a day trip of mountain biking
- 72% of respondents are willing to travel between 3 and 5 hours for a weekend of mountain biking
- When travelling to a mountain bike destination for a holiday, 65% typically spend 2-3 nights and 16% spend 4 – 7 nights at this destination
- When asked the question How often do you travel to a location within regional Victoria specifically to mountain bike, 8% travel weekly, 41% travel monthly and 31% travel at least three times per year.

The top four trail network attributes considered essential by survey respondents included:

- Signage, trail network map
- Car parking
- Toilets
- Drinking water

39 Colac Otway Shire, Forrest Mountain Bike Revitalisation Project Update (Stage One), (Colac, Vic: 2021), p.1.

In terms of attributes that would enhance a trail network and the riding experience, the top four responses were:

- Signage, trail network map
- Café or brewery
- Toilets
- Drinking water

Trail information and maps are provided by a range of sources including land managers, Trailforks and mountain bike clubs. However, information can be difficult to source, especially for those 'outside' the mountain bike community.

According to research conducted in 2015 by Tourism Research Australia, the top ideas to encourage cycle tourism provided by survey respondents were: [40]

- Downloadable maps – 38%
- Accessible online information – 37%
- Extensive network of cycle paths and trails – 37%
- Website that provide comprehensive information for planning a trip – 36%

The Victorian High Country's cycling brand Ride High Country is a significant success story and has received over $12M in funding for branding and marketing to build the Ride High Country brand and develop the region as a premier riding destination encompassing road and gravel riding, and mountain biking. The region currently receives 103,000 cycle tourists per year, spending $50 million in the region – more than any other regional destination in Australia. Cycle tourism visitor growth is forecast to continue, with the conservative scenario projecting 255,000 visitors participating in cycling in Victoria's High Country by 2025.[41]

Tasmania's trail networks and trail towns excel at creating a unique brand and experience. Blue Derby, Maydena, Wild Mersey and St Helens all have a brand, logo and market appeal which is distinctive and easily identifiable, encouraging business opportunities, partnerships, and revenue streams. Information is easy to find and accessible via websites and printed material.

CASE STUDY - ST HELENS MOUNTAIN BIKE TRAILS – TRAIL AMBASSADOR PROGRAM

An initiative of the Break O'Day Council and completed in 2019, the St Helens Mountain Bike Trails consist of 106 kilometres of trails across three locations with the main trail network connected to town via a 3.8 kilometre trail. The challenge of identifying a sustainable source of funding for ongoing trail maintenance was presented to the Local Government Team Management Challenge Group. The outcome was the Trail Ambassador Program, a tiered sponsorship program specially designed for the business community with the following aims:

- Generating an income for trail maintenance with the view to the trails being financially sustainable
- Allow local business buy-in, ownership and marketing partnerships.

The Trail Ambassador Program is tailored specifically to ensure financial viability for local businesses and includes five levels, Platinum, Gold, Silver and Trail Best Friends Forever (Trail BFF). An additional level, Black Diamond, is aimed at the corporate level providing flexibility whilst retaining integrity of the program and brand. Sponsorship monies are held independently of Council and are specifically for trail maintenance and development. Other revenue streams include merchandise sales and EFTPOS donation machines.

Trail Ambassador Program has provided the following outcomes.

- A forward plan for trail financial sustainability
- A business community engaged with the brand
- A business community that understands the value of the trails to their business and the community
- Trails that can become community led.[42]

Figure 5. St Helens MTB Trails Ambassador Badge

40 Australian Government Austrade, Cycling Tourism: 2015 Market Dynamics, [picture] (2015), https://tra.gov.au (accessed 4 June 2021).
41 Regional Development Australia, Grants and programs [website], https://www.rdv.vic.gov.au/grants-and-programs/cycle-tourism-investment, (accessed 5 September 2021).

42 J Brown, St Helens MTB Network Trail Ambassador Program (St Helens, TAS: Break O'Day Council, 2021).

GAPS IN MARKETING & PROMOTION OF MOUNTAIN BIKING, MOUNTAIN BIKE TOURISM AND DESIRED IMPROVEMENTS

The following is a summary of the gaps in the marketing and promotion of mountain biking in Victoria and development of iconic mountain bike tourism destinations discussed throughout this Strategy. The desired improvements form part of the broader recommendations.

TOURISM, MARKETING AND PROMOTION

Issue	Gap	Desired Improvements
Mountain Bike Destination Information	Information on existing mountain bike facilities in each region including trail information, supporting services, other attractions, and tourism opportunities, is limited. The information available varies in quality and relevance and is provided by a variety of stakeholders including land managers, clubs, LGAs and regional tourism organisations.	Develop a central portal for Victoria's authorised mountain bike networks and destinations including information on each trail network, supporting infrastructure and services and value add activities to inform the riding community, tourists and industry. *Ride High Country* is an example of a 'one stop shop' for information relating to all cycling opportunities in the High Country including support services available in the townships.
Mountain Bike Tourism	Cycle tourism and more specifically the mountain bike tourism market is growing, indicating potential for expanding mountain bike tourism in Victoria. Currently, the Victorian Alpine region's *Ride High Country* is the only destination product that is capable of being marketed internationally.	Support regions to identify new strategic locations to develop international and national mountain bike destinations and produce suitable material for marketing and promotion to target markets. Develop a statewide marketing campaign to promote Victoria as a mountain bike tourism destination aimed at attracting domestic and international tourists.
Branding	Destination specific branding assists to market and promote trail networks and the townships/ regions that support them.	Develop distinctive and unique branding to represent a mountain bike trail destination for current and future trail networks to assist with promotion of trail networks, townships and the region that supports these trails.
Imagery	Mountain biking in Victoria is dominated by males aged between 25-54 years, as is most of the imagery used in the industry to market and promote mountain biking.	Future Victorian mountain bike marketing campaigns to align with target market and include imagery representatives of the diversity of Australia's population.
International and National Events	Events have the potential to provide significant economic benefits to townships and regions and raise the profile of mountain bike destinations.	Identify existing and potential trail networks and locations capable of hosting national and international mountain bike events. This includes identifying existing locations that could be upgraded or expanded to cater for these events and supporting proposed new trail developments striving to host national and international events in the future.

Credit: AusCycling

TRAILS, FACILITIES AND INFRASTRUCTURE

Although there is a relatively high volume of trails supply in Victoria it mainly consists of multi-use or fire/ vehicle management trails rather than the purpose-built single track that mountain bike riders seek. Sanctioned, purpose-built trails are fundamental to meeting current and future demand and the experience sought by riders.

Throughout Victoria there is approximately 1,300 kilometres of single track on public and private lands, and Alpine Resorts, with the regions of the High Country, Goldfields, and Gippsland containing most of the current trail supply. The High Country's Alpine Resorts play a major role in providing purpose built single track to not only meet the needs of mountain bike riders but also to diversify revenue streams and provide an economic boost to alpine regions during the summer season.

Existing mountain bike facilities in Victoria are generally experiencing high demand and overuse, particularly those close to major population centres. Comments provided via the rider surveys indicated many riders felt their local trails were not challenging enough, do not have enough technical features and are boring after riding them for a while. Considering one of the top motivators/reasons for riding a mountain bike provided in the individual rider survey was for the challenge and a sense of accomplishment, it appears for some riders the local trails may no longer fulfill this motivation to ride.

Both land managers and the riding community recognise the need to provide additional trails, facilities, and infrastructure to meet the existing, and growing demand and needs of the different mountain bike user types. To achieve socially, environmentally, and economically sustainable trails it is imperative that land managers develop the right trail, in the right location, the right way and for the right reasons.

There is over

1,300km
of single track in Victoria

The **High Country,** **Goldfields** and **Gippsland** contain a majority of the current trail supply

cross country 26%
all mountain/enduro 67%
downhill 8%

all mountain/enduro is the most popular style of mountain biking in Victoria

cross country 59%
all mountain/enduro 31%
downhill 11%

however, the majority of singletrack available is cross country

● **19% Green**

■ **64% Blue**

◆ **15% Black**

◆◆ **2% Double Black**

The majority of dedicated singletrack trails are classified Blue suited to intermediate skill

3% Leisure
28 % Enthusiast
40% Independant
14% Sport
14% Gravity

a majority of riders consider themselves to be in the independant cohort

Riders will travel to other regions in Victoria to ride at least once a month

and most are willing to travel up to

2hrs from home for a day trip and

5hrs for a weekend trip

27% word of mouth

26% Other

25% follow social media

TRAILFORKS STRAVA
22% websites/apps

most riders source their trail information from mates, social media and riding apps/websites
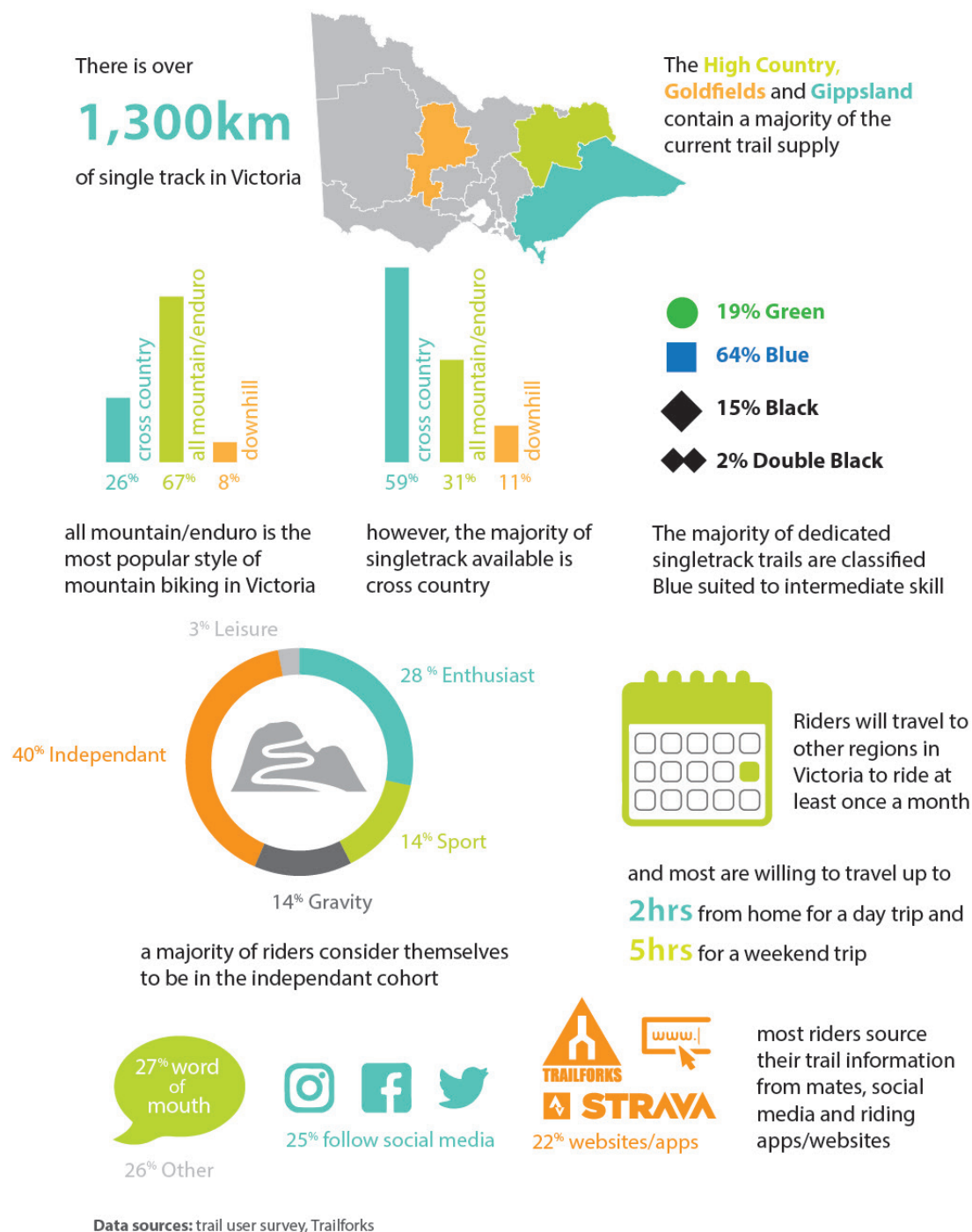
Data sources: trail user survey, Trailforks

Figure 6.   Mountain Biking Trends In Victoria

EXISTING TRAILS

Victoria's supply of mountain bike trails is characterised by user or volunteer created trails. Growth of networks has been organic and approved on an ad-hoc basis, reacting to changing needs, rather than following a strategic trail development plan and process. During consultation with land managers and trail users it became apparent that many of the existing networks are not designed to support the level of usage they receive. Some of the gaps identified in the existing networks included insufficient variety in trail types, insufficient kilometres of trails, insufficient maintenance, and insufficient supporting facilities. A well planned trail network will consider the expected usage, supporting facilities required, full life cycle costs and sustainable management and maintenance plan.

Each tourism region in Victoria has several trail networks of varying scale. Most networks have 40km or less of trail and based on trail quantity alone, 26 are considered a locally and 22 a regionally significant trail network. The Trails and Opportunities section of this Strategy provides further detail on existing trail networks in each region.

Fifty nine percent of existing trails in Victoria are cross country trails, however, consultation indicated 71% of riders prefer to ride All Mountain/Enduro trails. This indicates that the type of trail within existing networks is not meeting market trends and demand.

Sixty four percent of existing trails cater to the intermediate rider which does not quite align with the self-identified ability of the riders who completed the individual survey.

● 4% beginner

■ 39% intermediate

◆ 48% advanced

◆◆ 9% very advanced
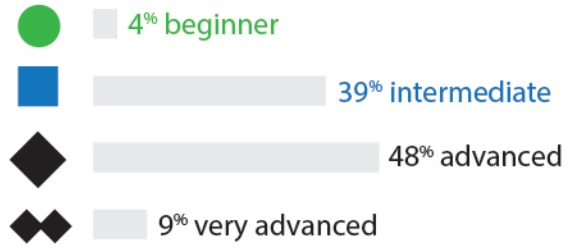
This suggests there is a gap in trail supply to cater for more advanced riders. Noting survey bias towards those already participating in the sport and the participation barriers noted earlier it is also likely there is a gap in supply of beginner trails and entry level experiences. Figure 7 provides a snapshot of existing trails in Victoria.

UNSANCTIONED TRAILS

The majority of land managers consulted as part of this project, reported challenges and frustrations relating to the construction of unsanctioned trails, which not only can cause significant harm to the environment and areas of cultural significance, but often consume maintenance budgets which would otherwise be allocated to the maintenance of formalised trails.

In addition the construction of unsanctioned trails on public land is illegal without land manager and statutory approvals and compliance with the relevant Act's and other legislation.

There is a need to educate the community on the legal implications and impacts of unsanctioned trail building and the detriment it can have on stakeholder relations, the environment and cultural heritage values, flora and fauna.
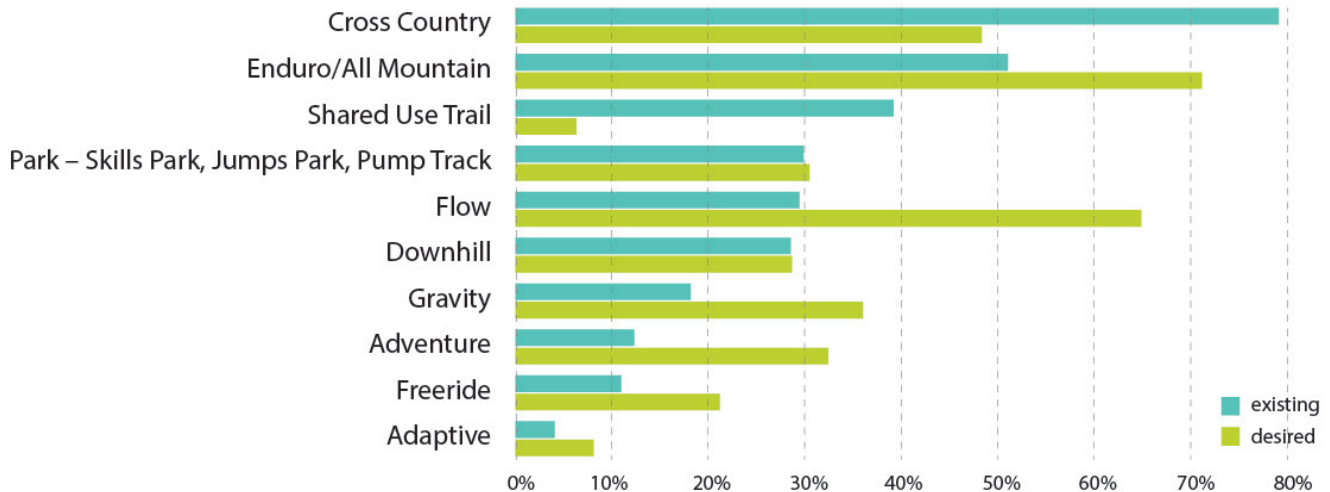

Figure 7. Existing versus desired trail type

RIDING LOCATIONS

It is important to understand which trails are currently servicing demand and how well these trails are catering to the demand. Trailforks was used to identify existing trail networks and riding locations in Victoria. These were then listed in the survey distributed to the riding community.

Using criteria such as quality and standard of signage, quality of maintenance and existing facilities, survey respondents were asked to provide feedback on existing trail networks. The following trail networks rated highly across all criteria.

- Mystic Bike Park, Bright
- Falls Creek Alpine Resort
- Buxton Mountain Bike Park
- Lake Mountain Alpine Resort
- You Yangs Regional Park
- Black Hill Bike Park
- La Larr Ba Gawa Park, Harcourt Mountain Bike Trails

Lack of and/or poor maintenance was the overwhelming reason for existing trail networks receiving a poor rating among survey respondents. Other facilities at trail networks identifying as either needing improvement or to be added was signage, (trailhead, trail marker and directional signage), toilets, drinking water and car parking, all of which are fundamental components in the provision of sport and recreation infrastructure.

The following existing riding locations close to Melbourne received the greatest number of responses from survey respondents.

- Lysterfield Park
- You Yangs Regional Park
- Silvan Mountain Bike Park

Forty-three additional riding locations throughout the state were identified by survey respondents. Many of these were discounted from the final Multi Criteria Analysis completed as part of this Strategy due to uncertainty around sanctioned versus unsanctioned and public versus private network. It is recommended that future regional and local planning seek to understand these additional trail networks and their use.

In addition to providing feedback on existing riding locations survey respondents were encouraged to identify aspirational or potential riding locations. Strong community support exists for the proposed Warburton Mountain Bike Destination with this location receiving the most engagement from survey respondents in terms of potential locations for new mountain bike facilities.

Other locations that had high engagement and were highly desirable to riders was the proposed Bright to Mount Beauty trail,

and the proposed Beechworth to Yackandandah Epic Trail.

Some of the reasons cited for the suggested aspirational ride locations included:

- To stimulate and drive tourism potential
- Cater for existing demand
- Provide opportunities for community to receive the health benefits delivered through participation in mountain biking
- Location is close to major population centres
- Site is no longer used such as a former quarry site, or mountain biking can co-exist with current site usage such as forestry/pine plantation
- Great location for a pump track, urban bike park providing opportunities for young people to ride close to home and for skill progression.

An interesting trend was the suggestion of areas not typically considered for trail development such as decommissioned golf courses, former quarries and pockets of underutilised urban space. As mountain biking and the demand for places to ride continues to grow, it is recommended future regional and local planning consider all options for land to cater to this demand. Some successful precedents to investigate include:

- Dunsborough/Meelup, WA – mountain bike trail development which utilises the pockets of landscape between the holes on an operational golf course and the neighbouring Regional Park.
- Bare Creek, Belrose NSW - downhill bike trails, flow trails, skills and dirt jump areas, a pump track, walking trails developed on a former tip site
- Quarry Park, Footscray, VIC – trails, jump lines, pump track , skills track developed on a former quarry/landfill site

Several land managers (LGAs, DELWP, Parks Victoria) reported an increase in construction of unsanctioned trails/ jumps on land they manage, particularly during the COVID-19 pandemic. Many of the LGAs that reported unsanctioned trail construction do not have any sanctioned or formal mountain bike trail networks within their region. Parks Victoria estimated there are approximately 8,500 km of unsanctioned mountain bike trails in use on public land in Victoria. It is unclear if this number refers to purpose-built mountain bike trails or includes the other types of trail used by mountain bike riders without authorisation.

In summary, the research conducted as part of this strategy suggests that the current market trends and demands/needs are not adequately catered for across Victoria. There is an incompatibility between market demand and

- current trail supply
- current location of trail networks
- market expectations of quality of trails and ongoing maintenance
- desired trail type and classification.

Funding for new infrastructure to stimulate Victoria's visitor economy offers an opportunity to address this incompatibility and gap in supply, location and type of mountain bike trails.

The map below indicates existing ride locations referenced in the rider survey (blue), additional ride locations added by respondents (yellow) and aspirational or potential ride locations (green).
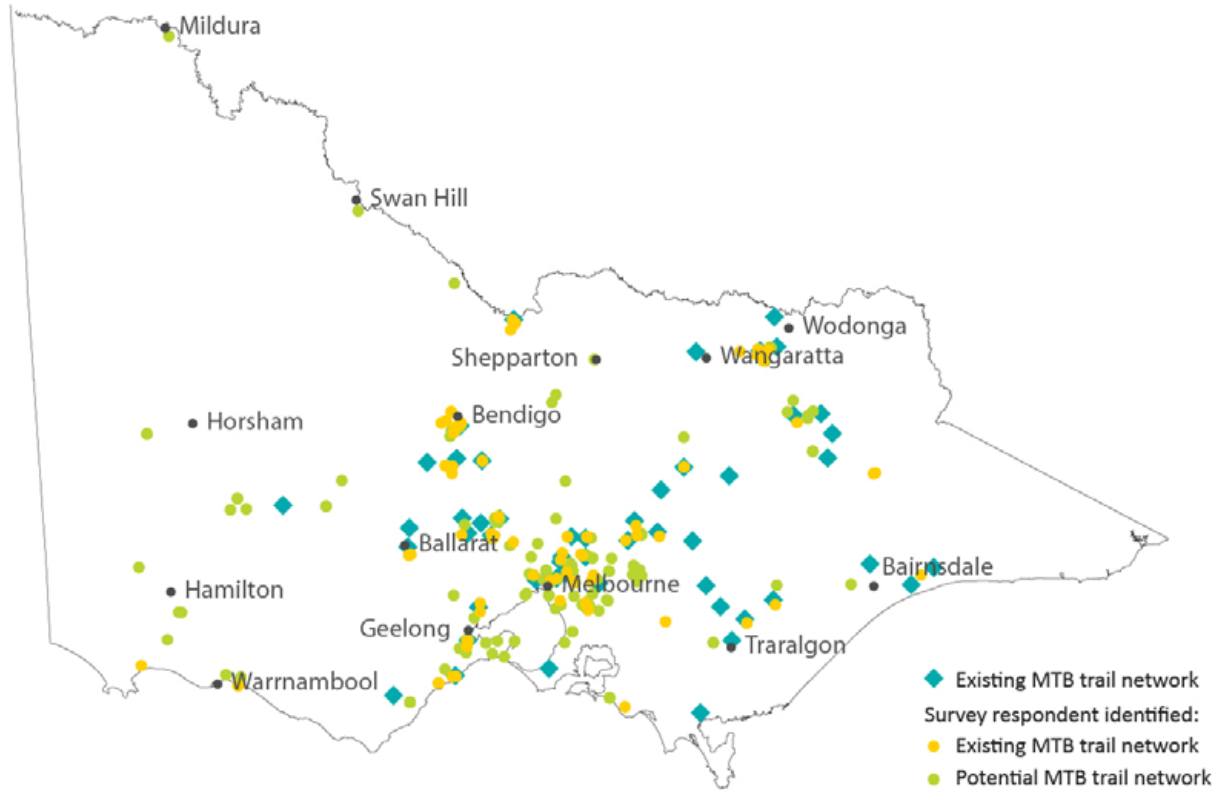

Figure 8.   Ride locations identified in Social Pinpoint rider survey

Credit: Common Ground Trails

GAPS IN TRAILS, FACILITIES AND INFRASTRUCTURE AND DESIRED IMPROVEMENTS

The following is a summary of the gaps in trail supply, facilities and infrastructure discussed throughout this Strategy, as well as desired improvements which form part of the broader recommendations.

TRAILS, FACILITIES AND INFRASTRUCTURE

Issue	Gap	Desired Improvements
Trail Usage	Not all land managers and trail networks collect trail usage data nor is there a centralised system to capture trail usage data.	Record and analyse trail usage data and market visitation for all existing and new mountain bike facilities. Establish a central reporting system to capture this information and make available to stakeholders and the industry.
Trail Information	Accurate data on trail supply and facilities at networks within Victoria is lacking and with no centralised publicly available trail data base.	Consolidate existing information on trail networks including trail quantity, type and classification and available facilities. Establish a central information portal to collate trail information including trail supply across all existing and new trail networks and make available to stakeholders and the industry.
Trail Signage	Signage and way finding on existing networks is inconsistent, lacking or absent, making it difficult for users to assess their ability against the skill level required.	Adopt the Australian Mountain Bike Trail Guidelines recommendations for signage types, including trailhead signage (incorporating trail etiquette), directional signage and trail markers.
Trail Types	The majority (59%) of existing trail is cross country trail. The rider survey indicated All Mountain/Enduro trail as the preferred trail type followed by cross country. All Mountain dual suspension is the most popular bike owned by survey respondents.	Increase the variety of purpose-built mountain bike trails to better align with community needs and demands, ensuring a suitable mix of trail types to cater for relevant markets.
Trail Classification	83% of existing trails are green and blue classification. User group consultation indicated 57% of riders identify as advanced (black) or very advanced riders (double black), yet only 17% of the existing trail are black or double black. Stakeholder feedback indicated a lack of beginner/entry level trails spread more widely throughout the state in locations accessible to this riding cohort. This is consistent with research undertaken in some other states/ territories.	Improve the diversity of trail types and experiences, including white, green, black and double black diamond, trails suitable for adaptive mountain bikes, adventure trails, bikepacking and off road adventure routes to ensure all user types are provided for.
Trail Classification	Research indicated very few trail networks have adopted the new Australian Trail Difficulty Rating System classifications.	New trail networks to adopt the Australian Trail Difficulty Rating System and classify/grade new trails accordingly.
Trail Quantity	Both land managers and the riding community recognise the need to provide additional trails, facilities, and infrastructure to meet the existing, and growing demand and needs of the different mountain bike user types.	Identify and investigate strategic locations across all regions to develop new or upgrade/refresh existing purpose built mountain bike facilities, ensuring appropriate supporting infrastructure and facilities exist or can be developed.
Trail Facilities	Generally, basic facilities such as signage, car parking, toilets and drinking water at existing trail networks is lacking based on results of the rider survey.	New trail developments to include the basic facilities and existing trail networks to work towards installing those facilities identified as lacking.
Urban Bike Parks	Both land managers and the riding community recognise the need to provide additional trails, facilities, and infrastructure to meet the existing, and growing demand and needs of the different mountain bike user types.	Diversify places to ride through the provision of localised opportunities near urban areas, including pump tracks, jump and skills parks, pocket parks, urban cycling precincts and trail networks of local significance.
Emerging Trends	There is a lack of understanding and information on the impacts, if any, of eMTB's on trails and other trail users.	Identify emerging trends such as eMTB's and investigate how to best to cater to these trends in future trail developments and upgrades to existing networks and in trail maintenance regimes.

TRAILS, FACILITIES AND INFRASTRUCTURE

Issue	Gap	Desired Improvements
Development of Trail Destinations	Most existing trail networks are considered locally or regionally significant from a trail quantity perspective but lack the supporting infrastructure to meet all the criteria. Several aspirational riding locations were identified by survey respondents and could provide a range of new mountain bike experiences throughout the state.	Identify strategic locations across all regions to develop (or upgrade existing) purpose-built mountain bike trails/facilities and tourism destinations, ensuring appropriate supporting services and infrastructure exists or can be developed.
Unsanctioned Trails	The construction of all types of unsanctioned trails can have a detrimental impact on the environment, areas of cultural significance and stakeholder relations.	Seek to educate the mountain bike community on the legal implications of constructing unsanctioned trails and the impact on stakeholder relations, the environment and cultural values.

Credit: Visit Victoria

PLANNING CONTEXT

Existing literature including relevant polices, strategies, plans, guidelines, tourism recreation and trail planning documents were reviewed to provide strategic and planning context for this Strategy.

The following planning documents were consulted and considered in the preparation of this Strategy and provide the strategic context to guide further development of mountain biking in Victoria.

State Planning and Policies

- Victorian State Public Land Mountain Bike Guidelines
- Victoria's Trails Strategy 2014-2024
- Victorian Cycling Strategy 2018 -2028
- Growing Cycle Tourism in Victoria
- Active Victoria – a strategic framework for sport and recreation in Victoria 2017-2021

Regional Mountain Bike and Trail Plans

- Outer Eastern Region Mountain Bike Strategy
- Central Gippsland 'G7' Mountain Bike hub Feasibility Study and Business Case
- Draft Mornington Peninsula Recreational Facilities for Mountain Bike and BMX Strategy
- Gippsland Tracks and Trails Feasibility Study
- North East Victoria Cycling Optimisation Master Plan
- Grampians RDV Region Cycling and Trails Infrastructure Business and Master Plan
- Western Metropolitan Region Trails Strategic Plan
- Northern Regional Trails Strategy
- West Wimmera Tracks and Trails Strategy
- Victoria's High Country Walking and Cycling Strategy

Local Mountain Bike and Trail Plans

- Draft Surf Coast Mountain Bike Strategic Plan
- Baw Baw Cycling Feasibility Study and Business Case
- Whittlesea Cycle Sports and Skate Strategy
- Walk, Cycle Greater Bendigo Strategy
- Mount Alexander Walking and Cycling Strategy
- Spring Gully Trail Network Master Plan
- Glenelg Tracks and Trails Strategy
- Corangamite Shire Trails Management Policy
- Forrest Mountain Bike Trails Design Project

Other Publications

- Australian Mountain Bike Trail Guidelines
- Australian Trail Difficulty Rating System
- Mountain Biking in Australia – an economic and participation analysis
- VicRoads Power Assisted Bicycle Guidelines
- Guidelines for Trail Planning, Design and Management

Many other more general documents and publications were reviewed as part of the literature review process. Further details of literature reviewed is provided in Appendix 1.

EXISTING GOVERNANCE

Throughout Victoria there are several governance structures in place to identify, pursue and develop local mountain bike opportunities. The role of governing and coordinating mountain biking in Victoria rests with AusCycling as the national sporting organisation for all cycling disciplines, including mountain biking.

Many key stakeholders play a vital role in the governance of mountain biking and are progressing mountain bike projects with varying degrees of success. Stakeholders manage several competing priorities and often work within a governance framework not suited or directly relevant to mountain biking.

There is an opportunity to establish a state-wide governance hierarchy which identifies and recommends an appropriate structure for each region and location. Ensuring there is a coordinated and strategic approach to development of mountain biking at a local, regional, and state-wide level, will enable communication between land managers and club and community organisations, and streamline decision making.

Through consultation with government stakeholders and agencies, land managers, clubs and the riding community, the following governance models were identified.

Club Led
Many clubs have a strong working partnership with land managers and tenure agreements in place, and have led the planning, funding, and development of mountain bike opportunities relatively independently. An example of this local club Team Mount Beauty who have led a successful campaign to progressively upgrade and expand the local trail network and mountain bike opportunities.

Local Working Group
Working groups have been established in some locations and regions to identify and pursue mountain biking opportunities that will provide benefits to local communities and regions. An example of this is Forrest Mountain Bike Revitalisation project spearheaded by Colac Otway Shire Council and Forest Fire Management Victoria. The governance structure for this project includes a Project Control Group (with the key agency partners and funding bodies) a Project Working Group (with agency partners, and a community and MTB Club representative) and an External Reference Group (with agency partners and community representatives).

Government Led
State or local government and/or government agencies have identified a demand and/or mountain bike tourism opportunity and may pursue and coordinate to develop a new or enhance an existing mountain bike opportunity. An example of this is Warburton Mountain Bike Destination project, led by Yarra Ranges Council and Sugar Bag Road Mountain Bike Trails in Caloundra, Queensland.

Private Developer
Private developers can provide different experiences than those offered by government managed mountain bike developments. With the growth in popularity of mountain biking and recognition of the significant economic benefits from investment in mountain bike facilities, private developers are investing in facilities throughout Australia. Warrenbayne Mountain Bike Park, located near Shepparton, was a private park offering shuttles, food and beverages and camping. However, the property was sold in 2018 approximately 12 months after opening and is no longer operational as a private mountain bike park.

CASE STUDY – SUGAR BAG ROAD MOUNTAIN BIKE PARK

Sugar Bag Road Mountain Bike Park started life as a collection of 'North Shore' style rickety timber structures and approximately 8km of trail constructed by locals keen to make use of the small sloping parcel of land owned by Council.

Sunshine Coast Regional Council employed a dedicated Trails Activation Officer whose primary focus was to work with locals and other land managers to develop a suite of trails across the Sunshine Coast. In 2015, an audit of the existing trails and technical features at Sugar Bag Road was conducted, with all timber technical features failing the audit assessment and deemed a substantial liability and risk. With no Australian Standards to guide the design and construction of timber mountain bike features, Council engaged a local structural engineer to apply the Australian Structural Building Code to develop a suite of designs and drawing for the replacement of the timber features.

Working with the newly formed Caloundra Off Road Cycling Association (CORCA), Council developed a Master Plan to guide future development of the site. Fast forward to 2021 and the Park consists of:

- 15km of trails
- Over 60 timber technical features
- An asphalt pump track
- Dual slalom course
- Skills park
- Dual flow trail
- A jump line
- Attracts between 20,000 and 40,000 visitors per annum
- An average of 850 volunteer hours per annum is invested in maintenance of the trails and timber structures

Future additions to the Park include commercial lease opportunities for the recently constructed on site café and bike shop and agreements with local businesses delivering mountain bike programs. [43]

Once complete, annual maintenance costs for the Park are estimated at $120,000 per annum. Below is a summary of Councils plans to fund the $120,000 per annum annual maintenance costs for the Park.

- Council invests $55,000 via its annual facility budget towards general site maintenance and funding to CORCA to undertake trail maintenance and for club development.
- Volunteers contribute approximately $25,000 of volunteer labour per annum.
- Sponsorship of approximately $15,000 is received per annum via CORCA.
- Revenue to be received via the commercial space is estimated at $20,000 per annum.
- The soon to open café is required to provide a space for a tap card donation facility which is estimated to generate approximately $10,000 towards trail maintenance. [44]

LAND MANAGEMENT CONSIDERATIONS

Policies regarding the approach and management of mountain biking vary between regions and localities. Major land managers in Victoria were consulted to discuss statewide policies, approach, opportunities and challenges associated with mountain biking across various land tenures.

Parks Victoria
As the largest land management agency in Victoria, Parks Victoria is responsible for the supply of most of Victoria's mountain bike trails. Parks Victoria's functions are to manage parks, reserves, other land under control of the state and waterways for the purpose of conservation, recreation leisure, tourism or water transport. The network of parks it manages includes state and metropolitan parks, national parks, marine parks and sanctuaries, wilderness areas, Aboriginal cultural places, post European heritage sites and significant portion of Victoria's coastline.

Support from Parks Victoria is critical for the future development of mountain biking across Victoria as are partnerships with other government agencies, land managers, key stakeholders, and the riding community. Following is an overview of the policy and planning and challenges relating to management and maintenance of mountain bike facilities on Parks Victoria estate.

Parks Victoria acknowledge the challenges faced:

- providing for not only the needs and demands of mountain biking but all recreational users
- balancing conservation, cultural values and recreational demand
- funding and resourcing maintenance of existing trail networks. [45]

Parks Victoria support a whole of government approach to the development of mountain biking in Victoria.

Department of Environment, Land, Water and Planning
DELWP manage, Victoria's parks and reserves, state forests, waterways, coasts and marine environments with Parks Victoria, VicForests, water authorities and committees of management. This includes Victoria's 3.14 million hectares of State forest and providing policy guidance for a further 3.98 million hectares of parks and recreation reserves. [46]

Mountain biking is one of the many recreational and commercial activities undertaken on public land within the Departments brief. Balancing the needs of different and competing users and uses and responding to demands in response to the projected population growth presents a major challenge for all aspects of DELWP's portfolio. Some mountain bike networks on DELWP managed estates include La Larr Ba Gauwa, Mt Taylor, Buxton, and Forrest Mountain Bike Parks.

Policy and Planning
In 2020, Park Victoria and DELWP via its entity Forest Fire Management Victoria (FFMVIC) prepared guidelines to assist public land managers to evaluate new or existing opportunities for mountain biking. The Guidelines acknowledge that in Victoria:

- Mountain biking has become an increasingly popular and well-recognised recreational activity on public land, offering many social, health and economic benefits.

43 S Ossedryver, Trail Stewardship (Caloundra: Author, 2021)
44 K Martin, Funding a MTB Park Sugar Bag – Case Study (Sunshine Coast, Qld: Sunshine Coast Council, 2021)

45 Parks Victoria, About us [website], https://www.parks.vic.gov.au/ (accessed 7 September 2021)
46 DELWP, Forest and Reserves [website], https://www.forestsandreserves.vic.gov.au/ (accessed 1 October 2021)

- Public land provides some of the best settings for mountain biking in Victoria.
- There is an increasing demand by mountain bike riders of differing needs and abilities to access existing and new tracks.
- Many of these existing and new tracks have not been formally authorised by the public land manager, and their development and use can lead to a range of issues including visitor conflicts and damage to critical environmental and cultural heritage values.

The guidelines provide further information on relevant legislation, strategic assessments and detailed planning required in decision-making. They provide a template to be used in evaluating all mountain biking opportunities. The guidelines direct Parks Victoria and FFMVIC staff to their respective procedures and processes that need to be considered, including Parks Victoria's Visitor Experience Framework and Placed Based Planning procedure and FFMVIC's District Action Plan (DAP) process.

Local Government Authorities (LGAs)
LGAs play a crucial role in providing sport and recreation infrastructure and participation opportunities for the local community, and a significant role in driving economic prosperity in their regions. Many LGAs have management responsibility for significant reserves across the state and help to meet the demand for mountain bike trail development through providing purpose built mountain bike single track trail networks.

The majority of the 51 LGAs that responded to consultation undertaken as part of developing this Strategy, were supportive of the continued development of mountain biking. However, the level of understanding of mountain biking, types of riders, trail types, requirements and the planning process varied considerably between LGAs. Some LGAs indicated mountain bike trails were located within the LGA boundaries, however as they were on land managed by another government entity, their knowledge of network and users was limited.

Many LGAs consulted indicated they had either a:
- general tracks and trails strategy covering multiple trail types and user groups
- cycling strategy covering all forms of cycling
- sport and recreation strategy which may or may not have covered mountain biking, or
- specific mountain bike strategy or local plan.

Negotiating with numerous land managers and government agencies was highlighted as a challenge when planning for a new mountain bike destination. Lysterfield Mountain Bike Park, managed by Parks Victoria, straddles three local government areas.

Hancock Victoria Plantations
Melbourne-based Hancock Victoria Plantations (HVP) is one of Australia's largest private timber plantation companies. The company is owned by a combination of Australian, Canadian and US superannuation and investment funds. The Hancock Timber Resource Group (HTRG), based in Boston, acts as overseeing manager on behalf of investors.

HVP Plantations estate is situated across areas of southern Victoria, extending from Gippsland in the east to the border with South Australia in the west and large plantations in the north east of the state. The total area of land managed by HVP equates to over 240,000 ha. About 165,000ha of this land is pine and eucalypt plantation. HVP is also the custodian of about 50,000 ha of native forest. As a matter of policy and practice HVP does not harvest native forest. All this native forest is managed for conservation.

Mystic Bike Park in Bright, and the Creswick Trails Project both utilise land managed by HVP. Mystic Bike Park is located within the Alpine Community Plantation, and is run by the Alpine Community Plantation Inc.

Established in 2013 Alpine Community Plantation Inc. is an independent community based organisation. It is the result of an innovative public, private & community partnership – the first of its kind for Australia and are responsible for the recreational, educational and community use of almost 20,000 hectares of HVP Plantations land within the Alpine Shire.

The aim of the Alpine Community Plantation is to develop a:
- nature based tourism precinct with a difference
- community run recreational space that creates iconic hand built walking and mountain bike trails and is the home of national and community events
- space that is created by and for the visitors and residents of the Alpine Shire.[47]

Alpine Resort Management Boards
Several of Victoria's existing mountain bike destinations are in the Victorian High Country on Crown land reserves managed by Alpine Resort Management Boards. Mountain biking provides a revenue stream and makes use of existing infrastructure and services in the summer season. Alpine Resort Management Boards through a range of funding sources including government funding, have constructed mountain bike trails to attract riders throughout the summer season. An example of this is Mount Buller Bike Park with a network of over 80km including an IMBA accredited Epic Trail. Mount Buller and Mount Stirling Resort Management Board recently completed a master plan to guide the future direction of mountain biking on the mountain and secured over $2 million of government funding to repair and upgrade the existing trail network.

The Department of Environment, Land, Water & Planning is responsible for providing alpine policy advice to the Minister and providing policy and a strategic framework for the operation of the Alpine Resort Management Boards.

In July 2022, the Alpine Resorts Victoria will be created. The new entity will merge Victoria's four existing Alpine Resort Management Boards, and replace the Alpine Resorts Coordinating Council. Traditional Owners will have a voice on the board of Alpine Resorts Victoria. [48]

Other Alpine land managers include:
- Alpine Shire Council (Dinner Plain) and
- Parks Victoria (Mt Buffalo, Mt Donna Buang and Mt St Gwinear).

Other Land Use Possibilities
There are examples of innovative approaches to planning and the re-purposing of land to provide mountain bike facilities. Quarries, tip sites and revegetated forestry land have successfully been transformed into mountain bike facilities. Quarry Park in Footscray provides a small mountain bike network catering to locals, while Bare Creek Bike Park in New South Wales is built on a former Council tip. Community members in Latrobe Valley in Gippsland have proposed re-purposing an open cut mine site into a Great Latrobe Park which includes a world class mountain bike destination.

47 Hancock Victoria Plantations, Hancock Victoria Plantations, [website], https://www.hvp.com.au/ (accessed 5 September)
48 Department Environment, Land, Water and Planning, Forest and Reserves [website] https://www.forestsandreserves.vic.gov.au/land-management/alpine-resorts (accessed 21 June 2021)

TRAIL MAINTENANCE

Increased use of trails and poor trail design and construction can lead to accelerated deterioration of trails and a higher resourcing requirement for ongoing maintenance. Many trail networks throughout Australia and Victoria rely on volunteer labour to maintain trails. Although, embracing the enthusiasm of the volunteer mountain bike community can strengthen partnerships between land managers and the mountain bike community, this model is not suited to all trail networks and there is concern amongst industry stakeholders this approach is difficult to sustain over the long term. Both land managers and the riding community acknowledged the challenge to maintain existing networks with the available resources.

21% of survey respondents currently volunteer for authorised trail building and maintenance

15% of survey respondents indicated they would volunteer if the option was available

The standard to which trails are maintained is influenced by available resources and the skill and experience of those undertaking the work. It can be a challenge for land managers and volunteers with limited or no mountain bike trail experience to determine an appropriate standard and process for trail maintenance. There is no existing professional certification framework and curriculum to identify minimum qualifications for trail builders. Mountain Bike Australia delivered trail development and maintenance workshops including several in Victoria to club volunteers, land managers and other community members. Although no qualification was attained from participation in these workshops, they were well attended.

Funding for trail maintenance is often difficult to source and is rarely provided through grant funding. Grants are usually limited to capital works. Traditional sports with exclusive tenure arrangements and permanent facilities have access to membership fees and other sources of funding to assist with maintenance of playing surfaces and supporting facilities. Due to its informal nature and tendency to lean more towards outdoor recreation, non-exclusive tenure arrangements and with mountain bike trails open to the wider population and other user groups, revenue streams to fund ongoing maintenance of trails is limited.

Options available to raise funds include:

- Donations
- Grants
- Fees – membership and programs/ clinics
- Sponsorship
- Events
- Fundraising activities
- Sales – merchandise, food and beverage

There is a need for more innovative funding and maintenance models to bridge the funding gap. An example of a tax-deductible fundraising avenue is the Australian Sport Foundation.

Established in 1986 the Australian Sports Foundation (ASF) was set up to address shortfalls in funding for sport, from the grassroots level. With charitable status, the Foundation provides philanthropic and private and corporate donors with a tax deduction for donations to registered sport projects. The Foundation is the only organisation in Australia to have a Deductible Gift recipient

status for sport and has raised over $520 million for grassroots organisations, schools, professional clubs and individual athletes. In FY20, over $44 million was raised through the Foundation to support the growth and development of sport in Australia.[49]

Over the past few years, several mountain bike clubs have utilised the ASF to raise funds for trail maintenance, new trail projects, skills programs and equipment and training. At time of preparing this Strategy, there were 18 mountain bike related projects lists on the ASF portal, seven of which were specifically for trail maintenance.

A lack of resources places increased pressure on land managers and volunteers who maintain trails, and consequently maintenance requirements cannot be met. Several survey respondents and land managers stated a lack of a sustainable maintenance model and funding sources impacts the quality and regularity of maintenance. A lack of and/or poor maintenance overwhelmingly contributed to many existing trail networks in Victoria receiving a poor overall rating among survey respondents. Lack of maintenance directly impacts the economic benefits derived from trail networks, as 'quality trails' are the primary driver for travelling to a trail destination.

The development of appropriate trails through sustainable planning, design and construction practices will minimise long term maintenance and resourcing requirements. As part of the trail development process, a trail management and maintenance plan should be developed to inform the life cycle costing of the new facility prior to construction.

According to IMBA and the Bureau of Land Management , a trail is considered sustainable when it allows users to enjoy an area with minimal impact to the natural and cultural resources and requires only modest maintenance. When a trail fails to provide the desired outcome, the resulting impacts can be crowding, conflict, and the creation of unauthorised trails, so a completely sustainable trail must align with desired user experiences. [50]

Trail Experiences = Social Sustainability

- Reduce user conflict
- Reduce informal and unauthorised trails
- Fulfill management objectives
- Engage stakeholders in balanced and positive trail management

One of the most important partnerships for ongoing trail management and maintenance is clarification of the 'trail owner' and 'trail operator'. The trail owner is the entity that owns the physical structure of the trails and is usually the owner or manager of the land the trail(s) is built on. The owner carries the liability for the health and safety of all trail users. The trail operator is the entity that maintains the trails to the agreed standards of the owner.

49 Australian Sports Foundation, Australia's leading nonprofit sports fundraising body, Canberra, ACT, Australian Sports Foundation, 2021, https://sportsfoundation.org.au/ (accessed 6 September 2021)
50 Bureau of Land Management, International Mountain Bike Association, Guidelines for a Quality Trail Experience, (US: BLM, IMBA, 2017) p.19.

CASE STUDY – JINDABYNE TRAIL STEWARDSHIP

The Jindabyne Trail Stewardship was established in 2014 and is a self-sustaining, not for profit group with the key aim to:

preserve, improve, and maintain access to the existing and future trail network within Jindabyne and surrounding areas, in an environmentally sensitive and economically viable way, in partnership with public, private and traditional landowners.

The trail network is situated on land managed by Snowy Hydro and Snowy Monaro Council – the trail owners.

The Stewardship is:

- affiliated with AusCycling
- governed by a committee
- supported by the local riding and business communities
- is a member based organisation
- the trail operator

Backed by the Snowy Monaro Council and supported by over 30 local businesses, the Stewardship has contributed over 2,500 volunteer hours to maintaining the local trails and are now able to employ a casual maintenance crew to bolster the volunteer efforts.

Key revenue raising activities implemented by the Stewardship include:

- Pay to ride
- Membership and subscription fees
- Sponsorship and donations
- Partnerships
- Grant funding
- Fundraising

A key to the Stewardships success has been effective engagement and management of the volunteers. With a clear vision, which is communicated to and shared by the volunteers, and a clear works program and expectations, work crews are assigned a team leader, tools, and materials. All volunteers undergo an induction and work management process and first aid training where required. The Stewardship has a strong volunteer recognition and reward program which ensures volunteers are recognised for their contribution and rewarded with Stewardship merchandise and other forms of recognition. [51]

CHALLENGES FOR LAND MANAGERS

State and Council managed reserves are under pressure from population growth and the growing popularity of mountain biking. There are a range of challenges for land managers in managing this growth, visitor expectations and competing land uses.

Broad challenges identified through consultation with land managers include:

- Catering for single use mountain bike trails, while balancing the needs of all user groups
- Balancing conservation, public health values and recreation values in parks and reserves
- Growing demand and lack of trail supply for new styles of mountain biking
- Keeping pace with shifts in trail types and preferences and emerging trends such as eMTB's
- Maintenance and management models are heavily reliant on community and volunteer champions and resources
- Limited funding available for maintenance
- Management and prevention of unsanctioned trail development
- Managing and responding to unsanctioned trails draws funds away from maintenance of sanctioned trails
- Lack of standards/ guidelines for trail maintenance and construction

51 Jindabyne Trail Stewardship, About us, Jindabyne, NSW, 2021 https://www.jindabynetrailstewardship.org.au/ (accessed 6 September 2021).

GAPS IN PLANNING, GOVERNANCE AND MANAGEMENT AND DESIRED IMPROVEMENTS

The following is a summary of the gaps in planning, governance and management discussed throughout this Strategy, as well as desired improvements which form part of the broader recommendations.

PLANNING, GOVERNANCE AND MANAGEMENT

Issue	Gap	Desired Improvements
Governance	There is currently no united whole of Victorian Government approach to managing mountain biking and mountain bike infrastructure within the state.	Develop an internal whole of Victorian Government framework to: • provide a consistent and coordinated government response to mountain biking and mountain bike infrastructure projects • streamline the approvals process in consideration of appropriate legislation and policy.
Governance	There is a lack of alignment in the strategic direction of mountain biking between government agencies, land managers and other stakeholders. Alignment heading into the future can guide government investment in the development and ongoing support for the sustainable and planned growth of mountain biking in the state.	Formalise the whole of Victorian Government's Mountain Bike Working Group to ensure key internal agencies are represented and develop terms of reference. Investigate the potential of establishing a state mountain bike advisory group to provide advice to Government and act as a conduit between Government and the mountain bike community. Assign a working group to lead the develop of an implementation and action plan to deliver recommendations outlined in this Strategy.
Funding	There are inconsistencies in what approvals and planning information is required to be eligible to receive Government funding. Some proposed mountain bike developments have received funding without landowner approvals or suitable studies having been completed. This has led to significant delays for project delivery.	Eligibility criteria in relevant federal and state government infrastructure funding programs to align with the trail development process and adequately address the need for: • land manager approval • consideration of planning approval requirements • funding model for ongoing maintenance • trail management model • shovel readiness.
Funding	Mountain biking is an outdoor recreation activity as well as a competitive sport. Traditionally, government funding does not fund maintenance activities. Due to its informal nature and tendency to lean more towards outdoor recreation, non-exclusive tenure arrangements and with mountain bike trails open to the wider population and other user groups, revenue streams to fund ongoing maintenance of trails is limited.	Investigate, identify and develop innovative funding and maintenance models for mountain bike trails to bridge the funding gap.
Planning	Lack of a coordinated approach to planning within regions and across regions.	Undertake regional planning to: • ensure a coordinated approach to the planning & delivery of mountain bike infrastructure at a regional level • maximise ability to leverage regional mountain bike opportunities • identify land suitable for mountain bike infrastructure with reference to trail models, trail hierarchy and trail types aimed at addressing gaps in trail provision and future demand.

PLANNING, GOVERNANCE AND MANAGEMENT

Issue	Gap	Desired Improvements
Planning	Planning and development of mountain bike facilities can be ad-hoc and inconsistent.	Implement the recommended mountain bike infrastructure planning process to ensure: • Appropriate levels of engagement with all relevant government agencies, Traditional Owners, land managers, national peak bodies, the local community and riders • Early identification of potential project delivery partners and stakeholders • A consistent and coordinated approach to mountain bike infrastructure development.
Legislation	Consultation with key stakeholders identified a desire for a statewide land use suitability assessment to provide guidance to land managers on suitability of public land for mountain bike projects, the type of facility/trail the land could support and required planning / approvals.	Work with whole of government to develop a statewide public land suitability assessment in consideration of the National Cycling Facilities Plan currently being developed by AusCycling.
Traditional Owners	The planning and development of mountain bike facilities must include consultation with Traditional Owners and follow an appropriate process suitable for each region/area, this is currently often missed or undertaken inadequately	Strengthen engagement activities and maximise partnership opportunities with Traditional Owners throughout the planning, design, construction, maintenance, management, and delivery of mountain bike facilities.
Partnerships	Current ad hoc planning statewide indicates a lack of communication between key stakeholders.	Develop new and strengthen existing partnerships with key organisations to ensure outcomes of the AusCycling National Cycling Facilities Plan and the Australian Mountain Bike Trail Guidelines including trail significance hierarchy and trail models are implemented.
Trail Management & Maintenance	Maintenance is heavily reliant on volunteer labour, is not standardised or well resourced.	Identify appropriate management and maintenance models and ensure a sustainable funding model is established for planned mountain bike facilities.
Trail Management & Maintenance	A lack of funds for ongoing maintenance of existing trail networks is a challenge faced by all land managers.	Identify alternative funding streams for regular and appropriate maintenance at existing sanctioned trail networks.

Credit: AusCycling

PLANNING HIERARCHY

To achieve a strategic approach to the provision of mountain bike facilities and address social, economic, and environmental sustainability, an understanding of the trail planning hierarchy, models, riding styles, trail types and classifications along with user types is required. This will ensure the right trail is developed in the right location, the right way and for the right reasons.

A planning hierarchy for the provision of mountain bike facilities, has been referenced in other state mountain bike strategies, including Queensland and Western Australia. In 2018 Mountain Bike Australia developed the Australian Mountain Bike Trail Guidelines in response to a growing need to establish and implement an Australian specific trail development process, to guide mountain bike trail planning from proposal to implementation.

At the time of preparing this Strategy, AusCycling was undertaking a National Cycling Facilities Plan which will deliver an Australia wide plan to guide the development of facilities across all cycling disciplines and will include:

Facility Audit

- Creation of a facility classification framework
- Conduct a national facility audit using the classification framework
- Overlay relevant data sets such as population demographics, school locations, membership data

Development of Facility Guidelines

- Audit of existing guidelines (by discipline, including multi-discipline facilities)
- Refresh or create required guidelines

Infrastructure Strategy and Implementation plan

- Undertake a needs / gap analysis from the audit that will establish a national understanding of current provision and future facility needs
- Develop the strategy by establishing a national vision for the development of cycling facilities, with a strategy for the development of facilities by discipline and state which will enable participation growth
- Develop the implementation plan for the provision of cycling facilities.

Credit: Common Ground Trails

RECOMMENDED PLANNING HIERARCHY

It is recommended Victoria adopt the following planning hierarchy to ensure alignment with the national guidelines and appropriate planning has been completed to support investment in mountain biking.

NATIONAL PLANNING

National Cycling Facilities Plan

Pending completion and relevance of material, the National Cycling Facilities Plan will provide an overarching guide to the development of cycling facilities in Victoria and Australia.

Australian Adaptive Mountain Biking Guidelines

The Guidelines produced by Break the Boundary with support from MTBA and the Qld Government, assists land managers, trail operators, event providers, clubs and other stakeholders, to provide infrastructure and opportunities for people to participate in adaptive mountain biking.

Australian Mountain Bike Trail Guidelines

The Guidelines aim to ensure that mountain bike trails are developed to align with landholder expectations, to meet the needs of riders, to minimise environmental impacts and to provide opportunities for the public to connect with the environment.

STATE PLANNING

Victorian Mountain Bike Strategy

This Strategy outlines the gaps and challenges to be addressed and managed, as well as recommendations at a state level, to maximise the benefits mountain biking can deliver.

REGIONAL PLANNING

Regional Mountain Bike Master Plans

Regional Master Plans provide a detailed review of opportunities and constraints of a specific region, which can incorporate multiple Local Government Authorities. A Master Plan establishes the development priorities for a region.

LOCAL PLANNING

Location Area Plans

Location Area Plans are generally implemented for a specific Local Government and may consist of a suite of documents, including broader recreational trail plans.

SITE PLANNING

Site Planning

Once identified in a Location Area Plan, an individual site can be planned. Site planning is implemented in several steps to ensure trails are designed and constructed appropriately.

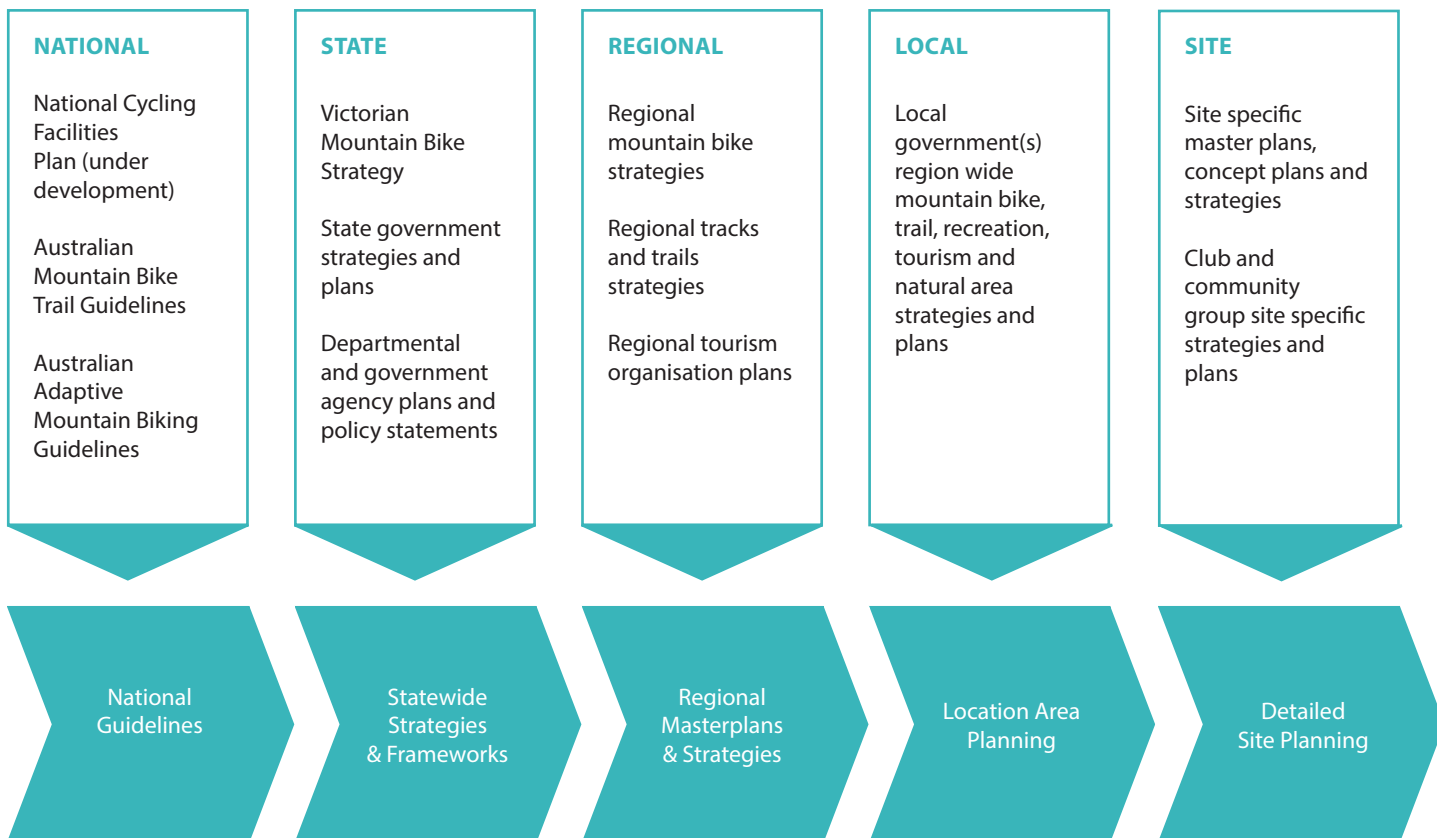| NATIONAL	STATE	REGIONAL	LOCAL	SITE
National Cycling Facilities Plan (under development) Australian Mountain Bike Trail Guidelines Australian Adaptive Mountain Biking Guidelines	Victorian Mountain Bike Strategy State government strategies and plans Departmental and government agency plans and policy statements	Regional mountain bike strategies Regional tracks and trails strategies Regional tourism organisation plans	Local government(s) region wide mountain bike, trail, recreation, tourism and natural area strategies and plans	Site specific master plans, concept plans and strategies Club and community group site specific strategies and plans
National Guidelines	Statewide Strategies & Frameworks	Regional Masterplans & Strategies	Location Area Planning	Detailed Site Planning

Figure 9.   Planning Hierarchy

SIGNIFICANCE HIERARCHY

It is essential for the scope and scale of a trail network to be established for any new development and ongoing management of trail systems. This ensures that trail systems of the right type, size, scale and extent are established in the right locations.

The trail significance hierarchy, which was developed by Daffyd Davis[52] gives a quantitative justification for identifying the size of a trail network. Quantitative criteria used to determine the significance of a location includes:

- Proximity to major transports links, airports and highways
- Accessibility from major highways
- Length of trails and number of loops
- Proportion of singletrack
- Range of trail classifications required
- Minimum site area required
- Minimum supporting infrastructure required to support the trails
- Exclusion zone from other significant trail networks

NATIONAL SIGNIFICANCE

A mountain bike facility designed for a large population centre and/or a tourism resource that caters for at least a week of unique riding opportunities.

REGIONAL SIGNIFICANCE

A mountain bike facility for a small population centre or large community and/or tourism resources that caters for short breaks or weekend trips.

LOCAL SIGNIFICANCE

A mountain bike facility for a small community and/or tourism resources that caters for day trips.

Establishing a diverse range of locally, regionally and nationally significant locations within a single region will result in an internationally significant destination to cater for visitors from a broad spectrum of markets and user types.

The level of trail significance should be established in the initial stages of planning when developing new trail networks. The following questions assist with determining the appropriate level of significance.

- What is the significance of the trail development to the local and wider communities in terms of both economic and social impacts?
- What is the significance of the trail development in terms of wider recreation and access issues?
- Will the development have impacts that are felt nationally, regionally, or locally (community level)?
- How many people and communities are the development likely to affect – positively and negatively?

The *Australian Mountain Bike Trail Guidelines* has further detail on the significance hierarchy and how establishing the level of trail significance fits into the overall trail development process. It is recommended that Victoria adopt the significance hierarchy as outlined in the Guidelines.

52 Mountain Bike Australia, Australian Mountain Bike Trail Guidelines, (Gold Coast, Qld: Mountain Bike Australia: 2018), p.34.

TRAIL MODELS

A trail model defines how a mountain bike facility can be developed and applied to a population centre or an individual site. Trail models heavily influence all parts of the trail planning, design and delivery process. As defined in the Australian Mountain Bike Trail Guidelines below is a summary of the four types of trail models.

A trail model should be established and applied to all mountain bike facilities at an early stage and must be appropriate to the scope, scale and objectives of the development.

Further information on the relationship between trail models and significance of a mountain bike facility, trail systems, trail direction, shared use and preferred use trails can be found in the *Australian Mountain Bike Trail Guidelines.*

| Trail Model	Population centre based user services/ facilities	Site based services/ facilities	Associated Infrastructure	Multiple trails	One trail
TRAIL TOWN OR HUB A population centre that offers a large range of high quality trails, trail user related services and facilities, trail related businesses, strong branding and supportive governance.	✓	✓	✓	✓	✗
TRAIL CENTRE A trail or trail network supported by high quality dedicated on site trail related services and facilities. A trail centre is stand-alone in an individual location and can be found within a trail town/hub.	✗	✓	✓	✓	✗
TRAIL NETWORK A collection of linked trails, often of the same type and typically accessed via a trail head. A trail network may be stand-alone within a population centre or individual location and can form part of a trail town/hub.	✗	✗	✓	✓	✗
INDIVIDUAL TRAILS Individual linear or looped trail. Small individual trails typically form part of an alternate developments model or may be a stand-alone individual trail in a community setting. Long distance trails can link trail models and can also be the precursor to developing a tourism destination.	✗	✗	✓	✗	✓
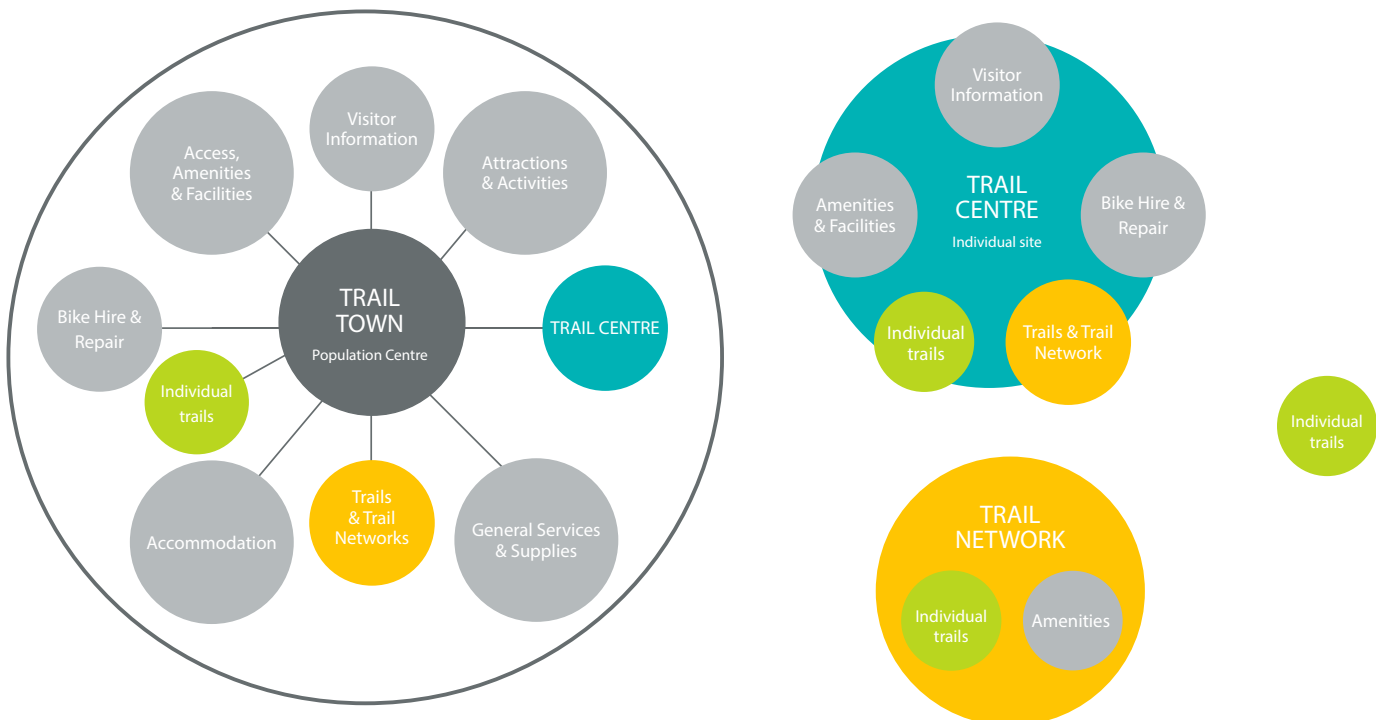
Figure 10. Trail Models

TRAIL TYPES

CROSS COUNTRY (XC)

Primarily single-track orientated with a combination of climbing and descending, and natural trail features of varying technicality. Cross Country trails appeal to the majority market and can cater for timed competitive events. Typically, bikes are lightweight with shorter travel dual suspension or have no rear suspension.

ALL MOUNTAIN (AM)

Similar to Cross Country and primarily singletrack orientated, with greater emphasis on technical descents, with non-technical climbs. All Mountain trails can cater for timed competitive events. All mountain trails may use uplift to the trailhead where appropriate. Bikes are typically light to medium weight with medium-travel dual suspension.

DOWNHILL (DH)

Purely descent only trails with emphasis on steep gradients for speed and technical challenge with a focus on skill development. These trails can cater for timed competitive racing. Downhill trails typically appeal to the more experienced market, however green (easy) downhill trails are emerging to cater for all experience levels. Downhill trails usually require uplift to the trailhead via chairlift or vehicle shuttling. Bikes are designed for descending, built for strength overweight and typically long-travel dual suspension.

FREERIDE (FR)

Typically, descent focused trails with emphasis solely on technical challenge and skill development. Trails feature both built and natural terrain technical features with a focus on drops and jumps. Appeals to the more experienced market and caters for competitions judging manoeuvres and skills only. Bikes are typically medium to long-travel dual suspension and are built for strength.

PARK (PK)

Built feature environment with emphasis on manoeuvres, skill development and progression. Appeals to wide market including youth and can cater for competitions judging aerial manoeuvres. Can include Jump and Pump Tracks and Skills Parks. Typically, dirt surfaced but can include hardened surfaces. Bikes are typically built for strength, with short travel suspension.

TOURING (TO)

Typically, long distance riding on reasonably uniform surface conditions and lower grades. Touring trails are dual direction linear trails or long distance circuits with a focus on reaching a destination. Touring trails can include rail trails, access/fire roads and single track. While there is a limited market for long distance mountain biking, touring trails can be ridden in sections making them accessible to all. Bikes may be carrying panniers or towing trailers, and are usually robust with limited suspension, however, for short sections or day trips most mountain bikes are suitable.

TRAIL CLASSIFICATIONS

Up until 2018, the classification of mountain bike trails in Australia was guided by the International Mountain Bike Association (IMBA) guidelines. In 2018, an Australian specific trail classification system and guidelines were developed. Further revision of trail classifications was undertaken in 2020 as part of a broader revision of the Australian Trail Difficulty Rating System.

Trails are rated from very easy to extremely difficult using criteria to assess trail width, tread surface, trail gradient, trail exposure, natural and technical trail features, and quality of signage.

Very Easy
Wide trail with a gentle gradient, smooth surface and no obstacles.
Suitable for beginner cyclists with basic bike skills and most bikes

Easy
Wide trail with a gentle gradient, smooth surface.
Some obstacles such as roots, logs and rocks.
Suitable for beginner cyclists with basic mountain bike skills and off-road bikes

Easy with Intermediate Sections
Likely to be single track with a moderate gradient, variable surface and some obstacles.
Some obstacles such as roots, logs and rocks.
Suitable for mountain bikers with mountain bikes

Intermediate
Single trail with moderate gradients, variable surface and obstacles.
May include steep sections.
Suitable for skilled mountain bikers with mountain bikes.

Intermediate with Difficult Sections
Suitable for competent mountain bikers, used to physically demanding routes.
Expect large and unavoidable obstacles and features.
Challenging and variable with some steep climbs or descents and loose surfaces

Difficult
Suitable for Experienced mountain bikers, used to physically demanding routes.
Navigation and personal survival skills are highly desirable.
Expect large, dangerous and unavoidable obstacles and features.
Challenging and variable with long steep climbs or descents and loose surfaces.
Some sections will be easier to walk

Extreme
Suitable for highly experienced mountain bikers, used to physically demanding routes.
Navigation and personal survival skills are highly desirable
Severe constructed trails and/or natural features, all sections are challenging.
Includes extreme levels of exposure and/or risk.
Expect large and unavoidable obstacles and features
Some sections will be easier to walk

USER TYPES

Type	Experiences sought	Classificaitons sought	Market potential
Leisure	Includes 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 highly accessible routes close to home or make the journey to trail facilities with amenities and services such as bike hire, cafes and toilets.	This group will generally seek white (easiest) and green (easy) classification trails. As they progress, will start to ride blue (moderate) classification trails.	Large
Enthusiast	Enthusiasts are purely recreational mountain bikers with moderate skills and variable fitness, and ride weekly. They are typically aged 29-49 and form the existing market majority. They typically don't compete in events and they possess limited outdoors experience. They prefer trails with good trail signs and seek technical but not too challenging trails. Enthusiast Mountain Bikers are the most likely to take short breaks to different areas.	Mostly green (easy) and blue (moderate) classification trails. As they progress will start to ride black (difficult) classification trails and have the potential to move into another user type (sport and/or gravity).	Moderate
Sport	Competitive mountain bikers, who ride regular routes multiple times a week and are members of mountain bike clubs, they are a small but influential market. They are willing to seek less accessible trails, have a high fitness level and are technically proficient but may have limited outdoor skills. They ride a very wide variety of trails.	Green – Double Black (extreme).	Small but influential
Independant	Skilled outdoor enthusiasts who ride once a week and are technically proficient with good level of fitness. Generally, they are a small market. Often involved in other outdoor activities, they a capable of planning their own rides and ride a very wide variety of trail classifications. The adventurous aspect is more important than the technical challenge and they seek more remote trails.	White to Black	Small
Gravity	Highly skilled technical riders who seek very challenging trails, typically ride at least once a week and are often members of clubs. They represent a small market that requires purpose built trails often with an uplift facility, which are repeatedly used in a concentrated manner. Gravity riders seek specific trails with the highest classifications.	Blue – Double Black	Small

MARKET MOTIVATORS AND NEEDS

Different rider types are driven by varying motivators, depending on whether they are riding recreational or travelling with the specific purpose to mountain bike.

Primary motivators are controllable factors that influence destination choice and are outlined in the table below.

Market Motivator	Needs
Diversity	A large quantity and variety of trail types and classifications located in varied terrain and topography.
Uniqueness	Facilities that provide an iconic, memorable, and fun experience by riding in a unique setting. Typically, in a natural landscape, with high visual and emotional value, and often connected to an attraction.
Quality	A range of high quality experiences predominantly on singletrack that is purpose designed and built for mountain biking. High quality information, services and infrastructure are also important.
Accessibility	Trails located within close proximity of population centres and short stay accommodation to promote use for recreation, competition and tourism. Cohesive, well signed, mapped and promoted trails. Connectivity to other trails, transport, services and infrastructure increase accessibility from the trails. Visitor services to improve accessibility for less experienced users.
Community	A developed mountain bike community offering market credibility, sense of belonging and camaraderie through events, volunteer support and social engagement.

The different user types, value different motivators depending on whether they are undertaking travel or riding recreationally, as outlined below.

User Type	Reason for Mountain Bike Travel	Recreation Needs and Motivators	Travel Needs and Motivators	Trail Types Sought
Leisure	Secondary	Accessibility & Quality	Accessibility & Uniqueness	Cross Country single track and touring trail
Enthusiast	Primary	Accessibility & Quality	Diversity & Quality	Cross Country, All Mountain single track and bike park
Sport	Primary	Diversity	Community & Diversity	Cross Country, All Mountain single track
Independent	Secondary	Diversity	Uniqueness & Diversity	Cross Country, All Mountain single track, and touring trail
Gravity	Primary	Accessibility	Community & Quality	Freeride, downhill single track and bike park

Credit: Flow Mountain Bike

EVENT REQUIREMENTS

The increased popularity of mountain biking has fuelled significant growth in the number of mountain bike events. Mountain bike events are diverse, cater to all types of riding styles, and people of all ages and abilities. Events can have a focus on competition or participation and recreation, and trail networks need to be designed to suit different racing formats.

The ability and need for a mountain bike facility to host events should be considered during the Trail Development Process. If planned for, event requirements can form part of the facility development process with minimal additional investment.

There are several factors to consider when assessing a mountain bike facility's suitability to host an event of any level and type. Land manager (trail owner) approval is important as its approval from the trail operator. Below are several factors to be considered when accessing a location's suitability to host an event.

- Permit and approval requirements
- Site & trail suitability
- Traffic management and parking
- Group staging areas including start/finish requirements
- Event village
- Spectator viewing
- Supply of essential services – power and water

EVENT GUIDELINES

The Union Cycliste Internationale (UCI) is the world governing body for competitive cycling, setting the rules and regulations and overseeing all international cycling competitions, including mountain bike World Cups series, World Championships, the Enduro World Series (EWS) and Olympic and Commonwealth Games mountain biking program. AusCycling establishes and maintains the regulations and guidelines for club, state and national level mountain bike events.

NATIONAL EVENT CRITERIA

As provided by AusCycling, key criteria considered when determining the location for national level events includes:

- Preferably within 90 minutes' drive of a major airport, sufficient access to hire car services and easy access for freight deliveries.
- A variety of accommodation options located at or near the venue (min, 1,000 beds).
- A wide range of visitor services and facilities at the venue location including supermarket, restaurants, take away food outlets, tourist services, hospital or comprehensive medical services, garages, chemists, and bike shops.
- On site venue facilities must include mains or generator power, adequate parking, bike wash, close access to running water, internet coverage and an area to establish an event village.
- In site venue services and additional benefits must include access to office accommodation or close by and economical supply of site sheds, hire companies, bus and driver rentals, crowd control, security services, parking, first aid and medical services, timing, public toilets, fire and emergency service and State Emergency Service nearby.
- Venue should be family friendly and include village activities.
- Local mountain bike club located in the area, and preferably at the trail location.
- Local hospital within a 30 minute drive from event location.
- Event layout as per AusCycling/ UCI guidelines.
- Shuttle uplift service for downhill races.

Experiences sought by mountain bike user types, their needs and preferences, trail facility models, event requirements, infrastructure and supporting facilities all need consideration in the development of mountain bike facilities.

TRAILS AND OPPORTUNITIES ANALYSIS

Credit: AusCycling

A key objective of the Strategy was to develop a prioritisation framework to guide investment decisions.

To develop priorities for the development of mountain biking in Victoria, it was important to identify appropriate and logical planning boundaries to rationalise the number of potential mountain bike regions.

The Tourism Victoria regional tourism boundaries current at the time of preparing this report, were selected as the most appropriate approach to mountain bike planning, as these eleven regions play a vital role in determining how the end user will experience each region. For this Strategy, these regions are referred to as the Victorian mountain bike regions. Each region contains a range of stakeholders, including LGAs, Regional Parks Victoria and DEWLP offices, Regional Tourism Organisations, Traditional Owners, Alpine Resort Management, mountain bike clubs and other key stakeholders.

Land considered under the Strategy for potential mountain biking opportunities included national parks, state forests, conservation reserves, recreation reserves and private land in urban and rural areas. This analysis provides a summary of broad opportunities and issues associated with each region, highlighting how they can capitalise on the potential for mountain biking and address significant gaps identified. The broad recommendations for each region provide the foundation for a prioritisation framework for the state. A regional approach to strategic implementation of mountain biking opportunities will ensure focused development and distribution of local mountain biking opportunities.

■	Melbourne	■	Phillip Island	■	Grampians
■	Daylesford & Macedon Ranges	■	Geelong & the Bellarine	■	High Country
■	Yarra Valley & Dandenong Ranges	■	Great Ocean Road	■	Gippsland
■	Mornington Peninsula	■	Goldfields	■	Murray

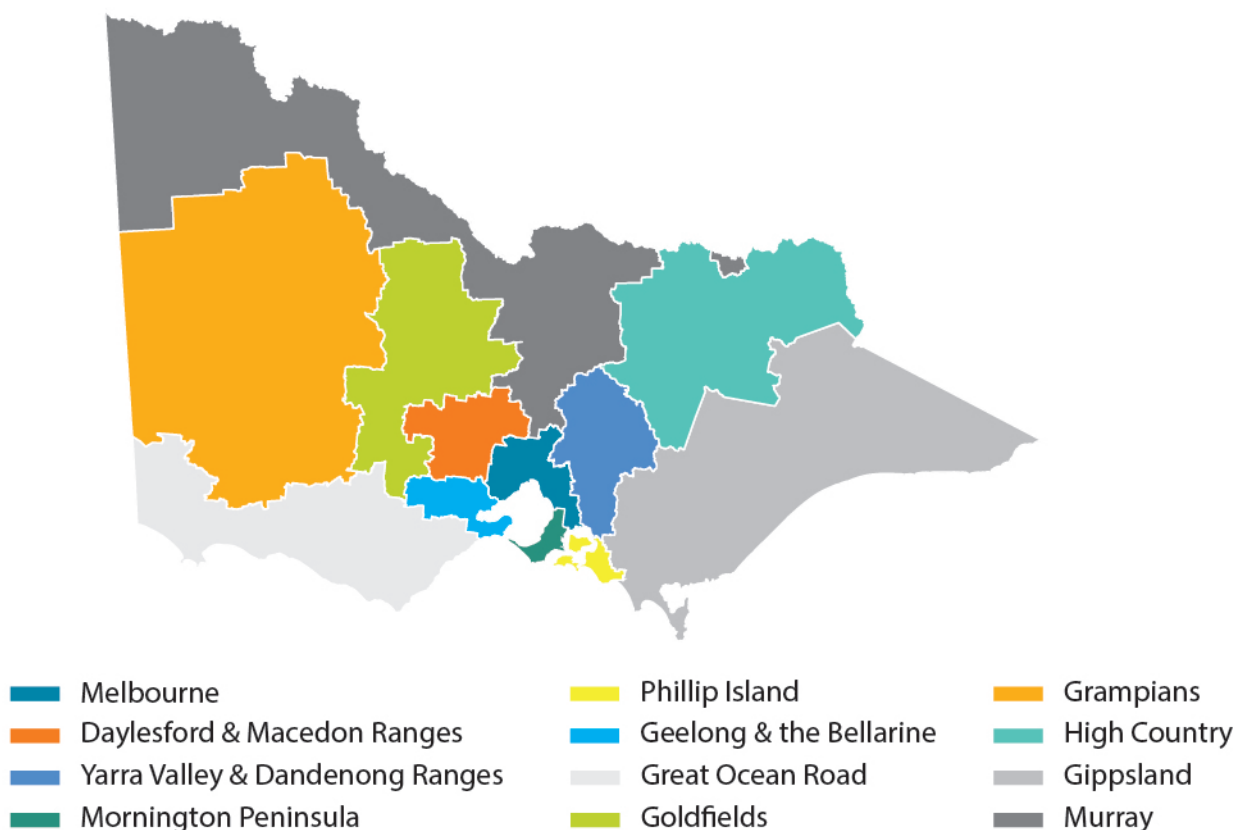Figure 11. Victoria's Tourism Regions

REGIONAL ANALYSIS

Several regions in Victoria contain a variety of significant existing and potential mountain biking opportunities. The establishment or enhancement of successful mountain biking destinations in Victoria will rely on identifying unique landscapes and desirable terrain to provide diverse mountain bike trails and riding experiences. It will also require locations to be developed to an appropriate scale, to be highly accessible and provide an appropriate level of service for the intended target markets.

A Multi Criteria Analysis (MCA) specific to Victoria was developed to assess and compare the mountain bike opportunities at a regional level. This analysis is primarily based on desktop information rather than detailed site assessments. However, additional information gathered through stakeholder consultation has also been considered. The MCA was used to assess each region in relation to potential for mountain biking, under three categories: Scale, Opportunity, and Deliverability. Recommendations were then made for each region based on the outcomes of the MCA. The MCA framework is provided in Appendix 2.

Some of the criteria assessed are presented graphically in the following pages, demonstrating the varying potential opportunities across the state.


International Airport
Domestic Airport
Road
Rail

ACCESS

To cater for the needs of mountain bike tourists (intrastate, interstate, and international) an analysis of accessibility was undertaken. In Victoria, population distribution is strongly related to railway connectivity. Regions where the population was well serviced by trains scored highly on access. Due to terrain, railway services typically avoid mountainous regions therefore some of the most accessible regions may not be as desirable in terms of mountain biking terrain. In addition to this, not all Victorian railway lines and public transport allow bikes to be carried.

Accessibility of major highways and airports were also considered. Proximity to international and regional airports, as well as major highways and roads will lead to a greater capacity for visitation for recreation as well as events. Where there are long distances to travel, people are less likely to visit for mountain biking unless they are especially unique and desirable locations. Figure 12 identifies the locations of airports, railway networks and highways.

Figure 12. Access Assessment

0 - 40k
40 - 100k
100 - 300k
300 - 400k
1M+
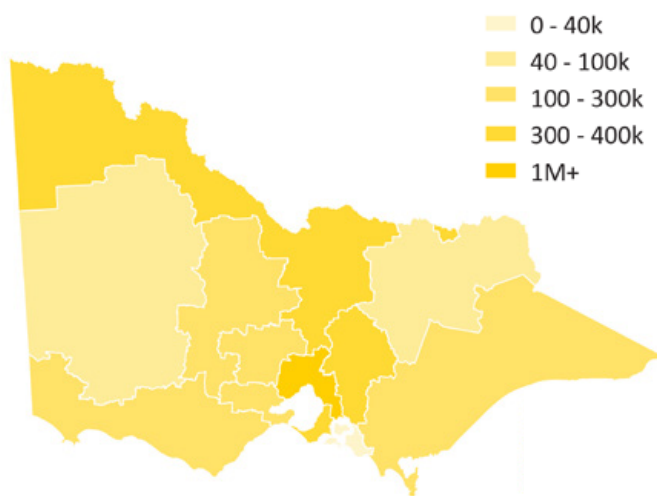
POPULATION GROWTH

Population is a key indicator of current and future demand for mountain biking in a region. Where there is a higher population, it is assumed there is a higher recreation demand. Population was calculated for each tourism region based on the ABS statistical area level 2 (SA2) borders.

Figure 13 displays the forecast percentage population growth between 2016 and 2036 in Victoria. Darker shading indicates a higher percentage population growth. In addition to considering the percentage population growth, the total population in each region was also included in the analysis. Melbourne is the most populated region in Victoria, followed by Yarra Valley, the Dandenong Ranges and Murray regions.

It is most interesting to note the projected population growth for Geelong and the Bellarine Peninsula. This region is projected to grow by 51% between 2016 and 2036, overtaking Mornington Peninsula and the Goldfields to become the 4th most populated region in Victoria.

The Grampians is the only region that is predicted to decline in population over this period with a predicted decline of 7.2 %. Recent trends resulting from lifestyle changes brought on by the COVID-19 pandemic could alter these projections.
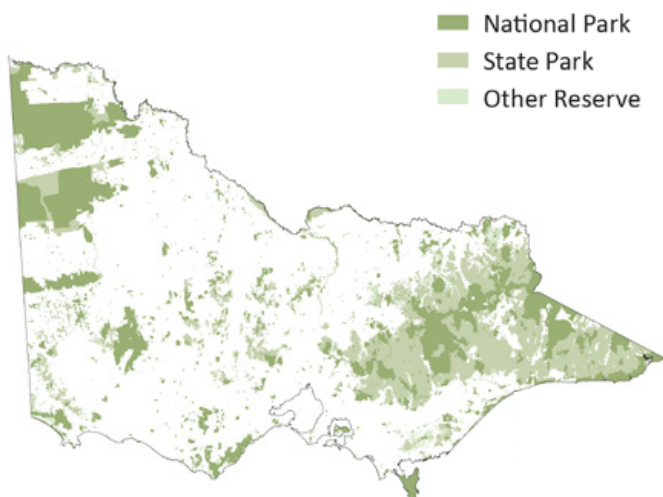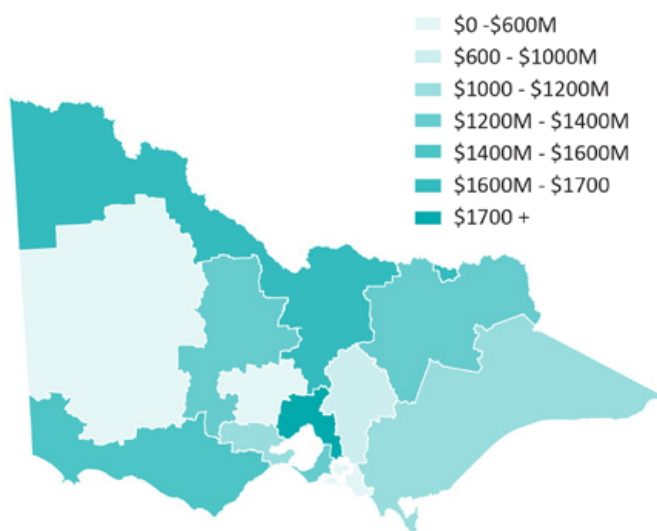
Figure 13. Population

Figure 14. Elevation

ELEVATION

The desirability of a mountain bike location and riding experience is heavily influenced by the available elevation. Broadly, a higher elevation range indicates higher desirability in the landscape that mountain bikers seek. Extremely steep terrain in concentrated areas is generally not suitable for mountain bike trails, and a detailed assessment of terrain should be undertaken in a later stage of planning. This assessment has focused on the elevation range of an area, as well as the distribution of elevation change across the area.

In Victoria, the Great Dividing Range provides much of the elevation and is predominantly towards the east of the state.

Figure14 illustrates the range of elevation across the state, and areas of greater elevation, which are indicated by darker shading.

Figure 15. Public Land

PUBLIC LAND

Typically, mountain bike projects are developed on public, government owned land. Gaining an understanding of the proportion of suitable public land available in a region is one indicator of the potential opportunity for mountain bike developments.

However, not all public land is suitable for mountain biking, due to land use, environmental and cultural heritage values of the land and a myriad of other factors. Further regional planning can identify which land may be suitable, while detailed local planning can identify suitability and suitable corridors on a specific site.

Figure 16. Total Tourism Expenditure

TOURISM VISITATION

Existing tourism visitation was incorporated into the Multi Criteria Analysis, as a way of identifying which regions are currently well equipped to service tourists.

Regions with high tourism visitation were assumed to have pre-existing facilities such as a variety of accommodation providers and other attractions to encourage visitation and engage people while visiting the area.

Domestic tourism was considered more highly than international tourism for several reasons. Firstly, domestic tourism makes up a significantly greater proportion of total tourism expenditure than international tourism expenditure. Secondly, due to travel restrictions related to the COVID-19 pandemic, international tourism is predicted to be subdued for the foreseeable future, and past performance data is not a reliable predictor of future performance in this case.

MULTI CRITERIA ANALYSIS
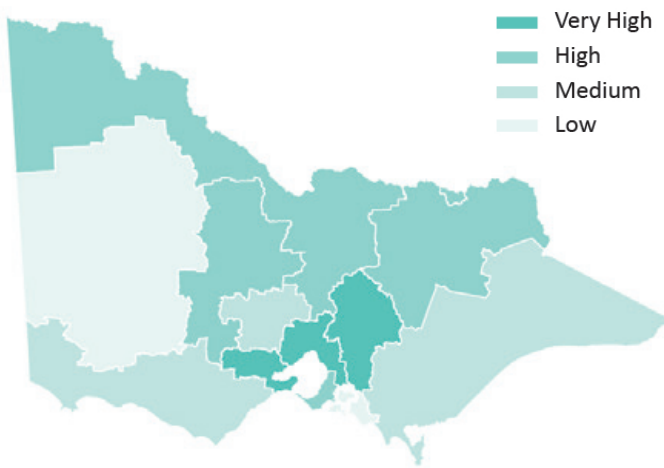
Figure 17. Scale Assessment

SCALE ASSESSMENT

For each region a Scale score was calculated determined by assessing the connectivity with existing and future populations, proximity to airports and highways, existing tourism market, and additional activities and desirability.

A very high scale score indicated that there would likely be significant numbers of riders in the region due to high populations in these areas.
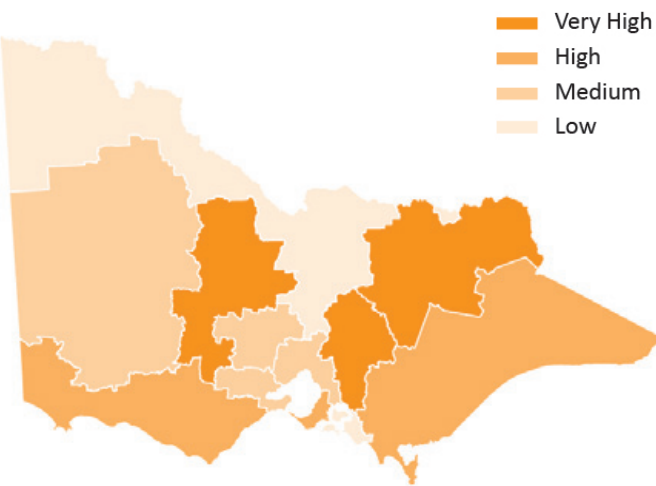
Figure 18. Deliverability Assessment

DELIVERABILITY ASSESSMENT

A Deliverability score was based on 'readiness' for trail projects. Regions that scored highly in this category had established planning in place and had either developed trail networks or were well on the path towards formalising or creating a trail project.

Locations that scored lower were showing emerging interest in mountain bike trails and infrastructure, however the ideas were in the early stages and were not yet supported by formal local or regional planning.
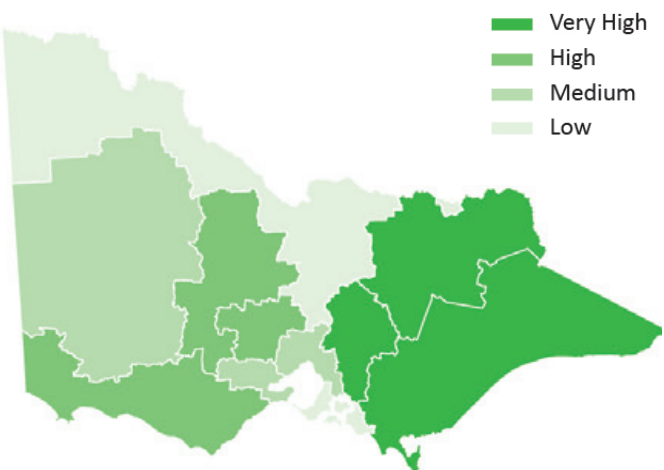
Figure 19. Opportunity Assessment

OPPORTUNITY ASSESSMENT

An Opportunity score identified each region as having either very high, high, medium, or low opportunity. This was determined through assessing the elevation range and spread, landform character and public land.

PRIORITISATION OF REGIONS

Three regions have been assigned Very High priority and High priority, respectively, through the MCA process. These six regions are referred to as 'State Priorities' and development of these regions should be prioritised to cater for high demand. Regions that rated 'Very High' have terrain that is highly desirable for mountain biking and are likely to have the capacity to host State and Nationally significant trail networks.

High Priority regions have high demand from recreational users, and existing networks in these regions were found to have high visitation, even if the terrain was less suitable for mountain biking. These regions are generally more highly populated.

It is recommended that the Very High and High priority regions undertake regional master planning or continue to implement actions and recommendations from existing regional planning. Regional Master Planning involves detailed location and site assessments, to guide and support future investment decisions.

The MCA Priority Scores calculated here are to guide state priorities and identify regions with high potential to create a strong a mountain bike destination and brand. However, regions noted as Medium and Low priority may still have high priority projects in each region. Ideally, all regions should consider mountain bike networks of an appropriate scale to cater for local demand and consider how mountain bike networks or facilities could complement regional tourism offerings. The table below summaries the outcomes of the MCA analysis for each region.
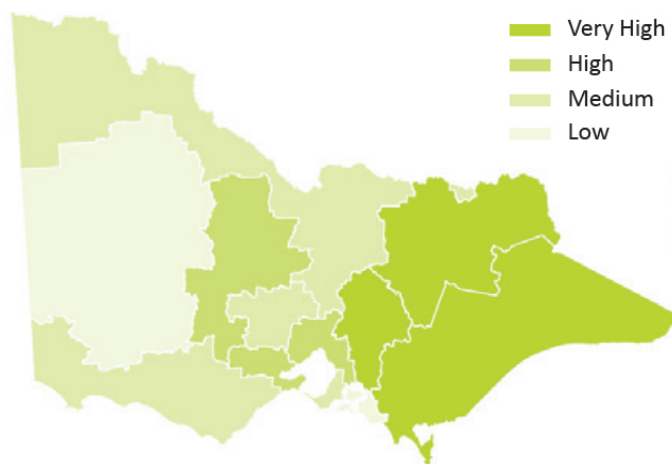
Figure 20. Priority Assessment by Region

REGION	MCA SCORE	SCALE	DELIVERABILITY	OPPORTUNITY
Very High Priority				
Yarra Valley and Dandenong Ranges	Very High	Very High	Very High	Very High
Victoria's High Country	Very High	High	Very High	Very High
Gippsland	Very High	Medium	High	Very High
High Priority				
Melbourne	High	Very High	Medium	Medium
Goldfields	High	High	Very High	High
Geelong and the Bellarine	High	Very High	Medium	Medium
Medium Priority				
Great Ocean Road	Medium	Medium	High	High
Daylesford and the Macedon Ranges	Medium	Medium	Medium	High
Murray	Medium	High	Low	Medium
Mornington Peninsula	Medium	High	High	Low
Low Priority				
Grampians	Low	Low	Medium	Medium
Phillip Island	Low	Low	Low	Low

Credit: AusCycling

YARRA VALLEY AND THE DANDENONG RANGES
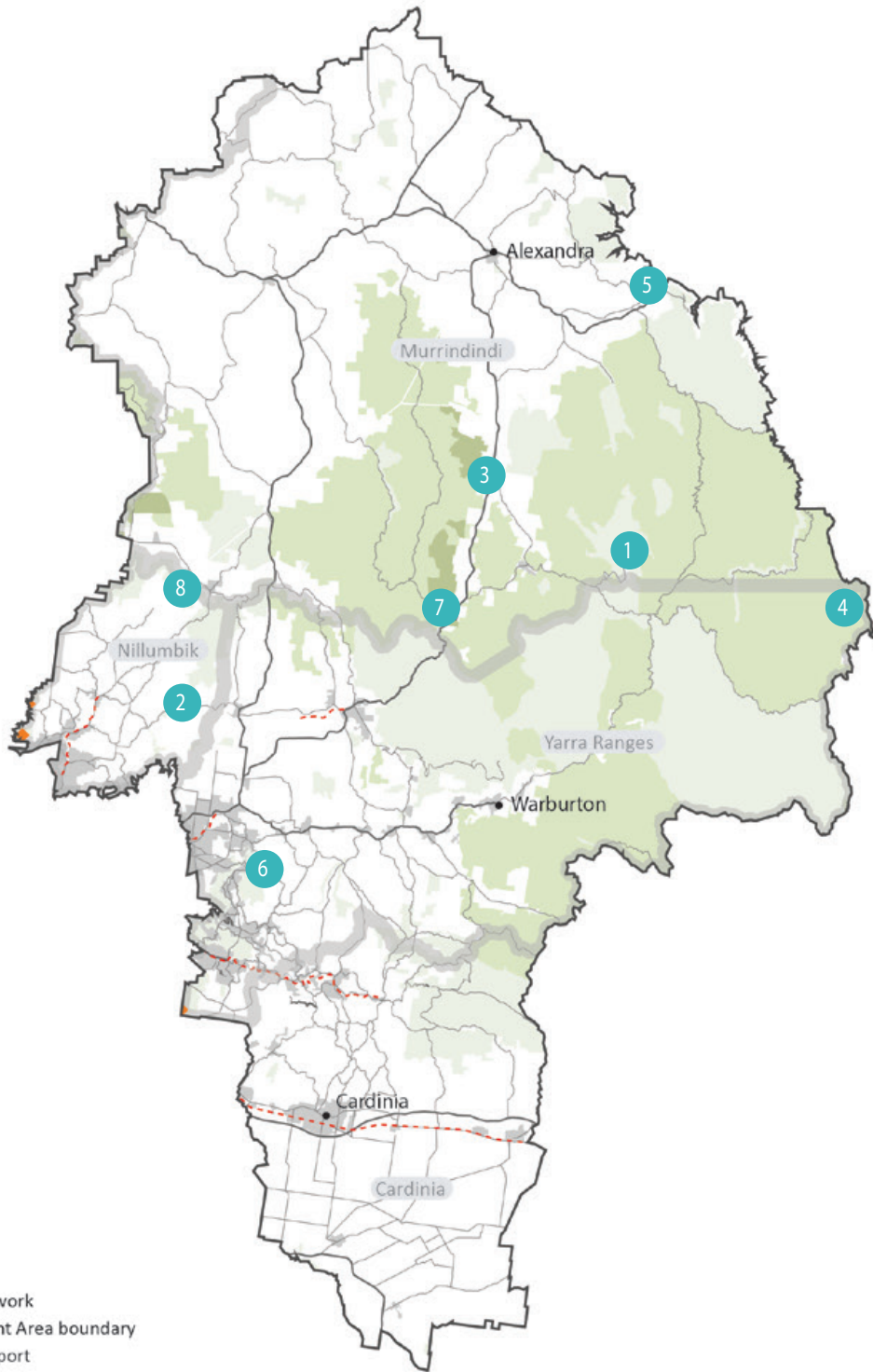
Legend:
- Existing trail network
- Local Government Area boundary
- International Airport
- Domestic Airport
- Built Up Area
- National/State Park
- Other Reserve
- Plantation

0   10   20   30km
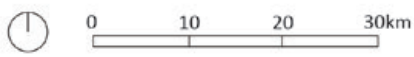
YARRA VALLEY AND
THE DANDENONG RANGES

Yarra Valley and the Dandenong Ranges is located on the eastern outskirts of Metropolitan Melbourne. Rich in natural beauty, the region showcases nature and wildlife. Tourists can learn about Australia's native wildlife at travel on the puffing billy - Australia's oldest steam railway or watch the sunrise on a balloon flight. In winter, there are cross country ski fields at Lake Mountain.

Credit: Ride Yarra Ranges

| Recommended Scale of Development	Very High
Priority	Very High
Tourism Region	Yarra Valley and the Dandenong Ranges
Local Government Areas	Nillumbik Yarra Ranges Cardinia Murrindindi
DELWP Regions	Port Phillip Hume
Relevant Land Managers	Parks Victoria DELWP Local Government
Mountain Bike Clubs	Yarra Ranges Mountain Bike Club Fat Tyre Flyers Lysterfield District Trail Riders Murrindindi Cycle Club Incorporated
Registered Aboriginal Parties	Taungurung People – Represented by Taungurung Land and Waters Council Aboriginal Corporation Wurundjeri People – Wurundjeri Woi Wurrung Cultural Heritage Aboriginal Corporation Bunurong People – Represented by the Bunurong Land Council Aboriginal Corporation
Key Features Parks and Reserves	Haining Farm Alfred Nicholas Memorial Gardens – Gardens of the Dandenongs Bunyip State Park Cathedral Range State Park Dandenong Ranges Botanic Garden Dandenong Ranges National Park Jells Park Kinglake National Park Lysterfield Park Pirianda Garden William Ricketts Sanctuary Yarra Ranges National Park

EXISTING TRAILS

ID	Location	Facility Name	Length	Trail Types
1	Lake Mountain	Lake Mountain	41	Cross Country, All Mountain, Downhill
2	Smiths Gully	Smiths Gully MTB Trails	29	Cross Country
3	Buxton	Buxton	23	Cross Country, All Mountain, Downhill
4	Woods Point	Woods Point	23	Cross Country, All Mountain, Downhill
5	Eildon	Eildon	13	Cross Country, All Mountain, Downhill
6	Silvan	Silvan Mountain Bike Trails	12	Cross Country
7	Narbethong/ Granton	Narbethong	2	Downhill
8	Kinglake	Bowden Spur Downhill	2	Downhill

SCALE

- In 2021 Yarra Valley and the Dandenong Ranges was home to 364,000 people. Population is projected to grow by 35% to 450,000 people in 2036.

- Yarra Valley is currently the second most populated region in Victoria, behind Metropolitan Melbourne's Tourism Region.

- In 2019, Total Domestic Tourism Expenditure was $851 million and Total International Overnight expenditure was $60 million.

- Yarra Valley and the Dandenong ranges is one of the most accessible regions in Victoria. Due to the proximity to Melbourne, parts of the region are accessible on the Melbourne Metro train network with trains run frequently to Lilydale and Belgrave. The region is an easy 1.5 hour drive from Melbourne's CBD and Melbourne's Tullamarine International and Domestic Airport.

- Analysis of existing trails in this region demonstrated high visitation with Lysterfield Park, which borders the Melbourne tourism region, having the highest visitation in the state.

OPPORTUNITY

- As part of the Social Pinpoint Rider Survey, riders were asked to give an overall rating of the existing trails. Buxton and Lake Mountain were ranked 3rd and 4th in the state respectively. Both networks were identified as having good maintenance, signposting and facilities. Riders enjoyed the fun flowy intermediate trails at Buxton and the adventurous gravity focused Cascades trail at Lake Mountain.

- Yarra Valley and the Dandenong Ranges rated very highly in the MCA performing well across all categories. It is accessible, has desirable elevation, existing mountain bike clubs and significant planning in place for a proposed mountain bike destination.

- This region is highly desirable to riders with 30 pins placed on the map identifying potential riding locations in the region. 15 of these pins were placed on Warburton, where a National Scale network is proposed, indicating strong support from the mountain bike community for this project.

- A key project objective of Warburton Mountain Bike destination is to deliver a world-class mountain bike destination that qualifies the project for classification as a Gold Level Ride Centre under the International Mountain Bike Association Ride Centre accreditation process. Warburton has a key point of difference to other event centres in Victoria due to its proximity to Melbourne and excellent accessibility from Melbourne Tullamarine airport, making it easy for interstate and international riders to access the trails when they arrive in Victoria.

- In the analysis of tourism data for this Strategy, there was a strong correlation between number of nights spent in a region and the total tourism expenditure within the region. Yarra Valley and the Dandenong Ranges being located close to Melbourne, are well placed to attract day trip tourists to the trails. This trend is evident by the this high visitation numbers for Lysterfield Park. Converting these day trips into overnight or weekend trips will drive a higher tourism expenditure. Creating experiences within the region that encourage tourists to 'linger longer' including developing engaging trail experiences and high-quality accommodation options will encourage more people to stay multiple nights, thus increasing the overall tourism expenditure in the region. Ensuring that international and interstate tourists visiting the trails choose to stay in the region, in lieu of Melbourne, will drive increased tourism expenditure.

Credit: Flow Mountain Bike

- There are currently four mountain bike clubs in this region affiliated with AusCycling - Yarra Ranges Mountain Bike Club (YRMTB), Fat Tyre Flyers, Lysterfield District Trail Riders (LDTR), Murrindindi Cycle Club Incorporated.

- There are several commercial operators located in this region including include Joyride MTB Coaching, Lake Mountain Alpine Resort Shuttles, Yarra Valley Cycles and Ride Time Yarra Valley.

- The Draft Outer Easter Regional Mountain Bike Strategy covers three LGAs in this region, Yarra Ranges Shire, Nillumbik Shire and Murrindindi Shire. This strategy outlines a vision for the region to 'become Victoria's mountain bike destination of choice'. The Strategy also identifies four guiding principles for the development of mountain biking in the Outer Eastern Region:

  - Community and Economic Development Opportunities

  - Sustainable and Accessible Trail Network

  - Integrated Planning and Management

  - High Quality Visitor Experiences

- The Outer Eastern Regional Trails strategy also provides a detailed assessment of trails in the region, and highlights issues and opportunities identified by the strategy for each network.

- Overall, the LGAs in this region are familiar with and supportive of mountain bike projects. The Warburton Mountain Bike Destination Project being developed by Yarra Ranges Shire Council in partnership with Parks Victoria and DELWP and with input from the Wurundjeri Woi Wurrung People, Melbourne Water and the Upper Yarra Community Enterprise.
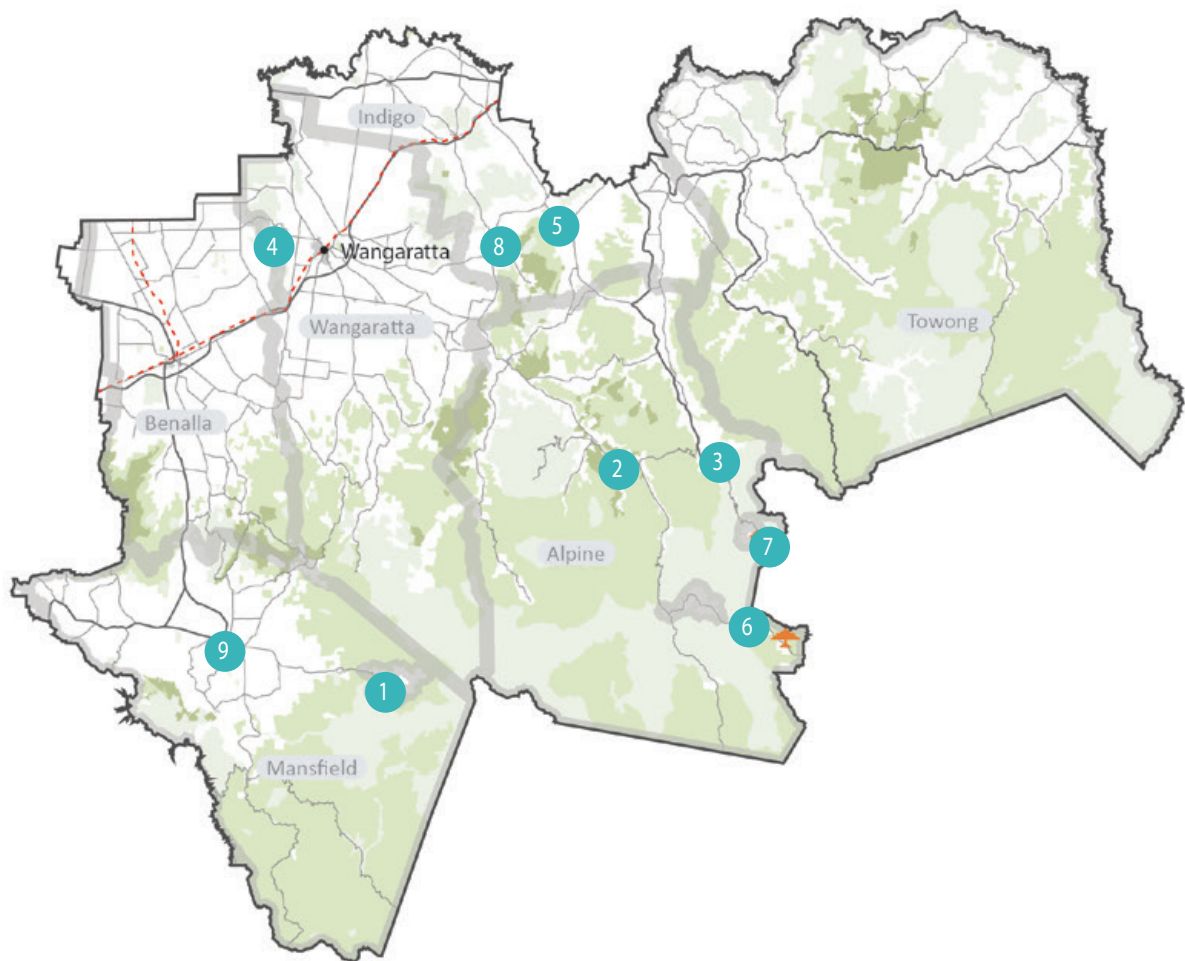
Legend:
- Existing trail network
- Local Government Area boundary
- International Airport
- Domestic Airport
- Built Up Area
- National/State Park
- Other Reserve
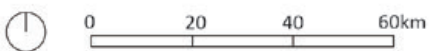- Plantation

0   20   40   60km

Figure 21. Yarra Valley and the Dandenong Ranges

VICTORIA'S HIGH COUNTRY

Victoria's High Country has picturesque mountains, the Alpine National Park, and charming villages. In winter, the region is abuzz with skiers and snowboarders as people flock to the ski fields. The High Country has led the way in Victoria catering for cycle tourism. The Victorian High County has maximised its appeal to bike riders over the past few years and as has broadened the appeal of the region from skiing into a year-round destination. The region is a premier cycling destination for mountain bikers, road cyclists, gravel riders and rail trail riders and is backed by a strong and recognisable marketing and branding campaign.

Credit: Tourism Victoria

Recommended Scale of Development	High
Priority	Very High
Tourism Region	Victoria's High Country
Local Government Areas	Mansfield Alpine Wangaratta Indigo Towong Benalla
DELWP Regions	Hume
Relevant Land Managers	Parks Victoria DELWP Local Government
Mountain Bike Clubs	Beechworth Chain Gang Alpine Cycling Club Dinner Plain Riders Team Mount Beauty Yack Tracks Inc Mansfield Mount Buller Cycling Club Wangaratta Cycling Club
Registered Aboriginal Parties	Yorta Yorta People – Represented by Yorta Yorta Nation Aboriginal Corporation Taungurung People – Represented by the Taungurung Land and Waters Council Aboriginal Corporation Gunaikurnai People – Represented by the Gunaikurnai Land and Waters Aboriginal Corporation
Key Features Parks and Reserves	Alpine National Park Howqua Hills Historic Area Lake Eildon National Park Mount Buffalo National Park Warby-Ovens National Park

EXISTING TRAILS

ID	Location	Facility Name	Length	Trail Types
1	Mt Buller	Mt Buller Bike Park	88	Cross Country, All Mountain, Downhill,
2	Bright	Mystic Park Mountain Bike Park	56	Cross Country, All Mountain, Downhill
3	Mount Beauty	Big Hill Mount Beauty	41	Cross Country, All Mountain, Downhill
4	Wangaratta	Warby Range	36	Cross Country, All Mountain, Downhill
5	Yackandandah	Yack Tracks	36	Cross Country
6	Dinner Plain	Dinner Plain Mountain Bike Park	31	Cross Country, All Mountain
7	Falls Creek Alpine Resort	Falls Creek Mountain Bike Park	27	Cross Country, All Mountain, Downhill
8	Beechworth	Beechworth Mountain Bike Park	17	Cross Country, All Mountain, Downhill
9	Mansfield	Rifle Butts Mountain Bike Park	7	Cross Country

SCALE

- In 2021, Victoria's High Country is home to almost 90,000 people. Population is projected to grow by 11% to 97,000 people in 2036.

- In 2019 Total Domestic Tourism Expenditure was $1247 million and Total International Overnight Expenditure was $22 million.

- Victoria's High Country is doing well to maximise the expenditure from visitors, and in 2019 had the highest domestic overnight spend per visitor in the state. The region increased total domestic expenditure from $695 million in 2015 to $1247 million in 2019.

- In the MCA for this Strategy Victoria's High Country scored low for accessibility due to its proximity to domestic airport and train transport. Hotham has a small airport; however, it only supports small charter flights. The closest major domestic and international airport is Melbourne Tullamarine, which is 3 - 4 hours' drive away. Alternatively, Albury airport in New South Wales is located approximately 1.5 hours from Bright. The most visited mountain bike parks in the region, Mystic, Falls Creek and Mount Buller, are all not accessible by train and bikes are not supported on the V-Line buses which service the area.

- Despite the overall region scoring low in accessibility, there is a unique point of difference to mountain bike parks in the High Country. In the High Country region, the towns are in close proximity to desirable elevation. Mystic Bike Park in Bright was mentioned by multiple respondents to the Social Pinpoint Rider Survey as being a great mountain bike destination because once in the town, it is easy to ride to the trails from accommodation and eateries. Similarly, the mountain bike trails at the alpine resorts are also located in riding distance of accommodation and cafes. Respondents to the survey highlighted this as a highly desirable characteristic of the trails in this region. Particularly in Bright, this proximity of the town to the trails has been integral in creating a 'trail town vibe' as well as encouraging tourism spend.

OPPORTUNITY

- Victoria's High Country has had significant investment, planning and development to establish itself as a mountain bike and cycling tourism destination and is leading the way in Victoria as a mountain bike destination region.

- The North East Victoria Cycling Optimisation (NEVCO) Master Plan vision states that "By 2028 Victoria's High Country will be recognised as the lead cycle tourism region in Australia, attracting more cycle visitation and yield than any other destination. It will do this by delivering a world-class and seamless ride experience across all cycle disciplines, offering premium tracks, trails and routes supported by outstanding cycle tourism services and products."

- The NEVCO Master Plan identifies several strategic considerations for this region as it plans for the future and include the following relevant to mountain biking.

  - Increasing competition in mountain biking destinations across Australia and the need to stay relevant as other regions progress plans for mountain biking.

  - Creating cycle friendly towns including a quality network of 'in town trails.'

  - Marketing focusing on intrastate and interstate tourism, with a long-term focus on attracting international tourists.

  - Developing a strong Cycling Culture across the region with consistent and branded cycling signage and information to provide a seamless experience across the region. Supporting cycling friendly businesses, bike hubs, safe roads and cycle training programs.

  - Growing the cycling brand of the region by attracting Cycling Events and exposing new markets to the region.

- The Master Plan also identifies several key mountain bike projects including:

  - Beechworth to Yackandandah Mountain Bike Trail

  - Falls Creek Mountain Bike Network Expansion

  - Mount Buller Mountain Bike Park Improvements

  - Mystic Mountain Bike Park Improvements

- The Master Plan also aims to create a cycling friendly region, improving accessibility in the region, and continuing to market and promote the region under the 'Ride High Country Brand.'

- Recent projects in the region include the new trailhead facilities at Big Hill in Mount Beauty, a project lead by the club Team Mount Beauty and funded via the Department of Premier and Cabinet's, 'Pick my Project.'

- A new mountain bike park is also proposed at Mitta Valley with $1.5 million provided for Stage 2 through the Local Economic Recovery Program.

- An additional five aspirational riding locations were identified through the Social Pinpoint survey.

DELIVERABILITY

- There are seven clubs in Victoria's High Country offering mountain biking, the highest number of any tourism region in Victoria. These clubs include Beechworth Chain Gang, Alpine Cycling Club, Dinner Plain Riders, Team Mount Beauty, Yack Tracks Inc, Mansfield Mount Buller Cycling Club, and Wangaratta Cycling Club.

- Victoria's High Country has extensive planning in place and the North East Victoria Cycling Optimisation Master Plan is a cornerstone planning document for the region. There has been significant investment in the region, and this investment is continuing. The area has supportive LGAs and land managers, Alpine Resort managers and Hancock Victorian Plantations. There has been extensive location area planning at all the alpine resorts

- At least five Mountain Bike Australia National Championships have been held in Bright since 2014 and in 2019, the national championships coincided with the Oceania Mountain Bike Championships. The region is well established event hosting capacity and capability.

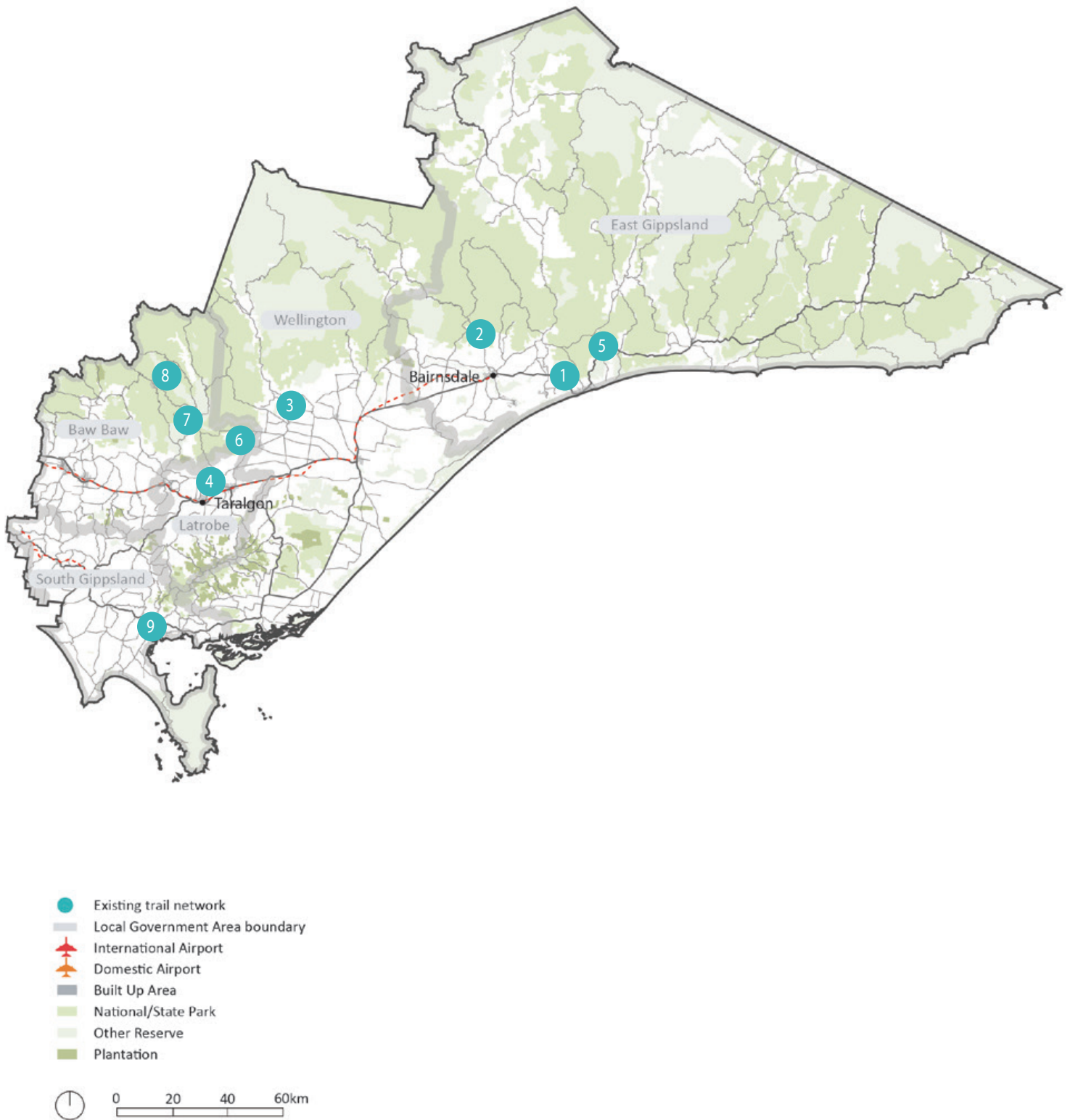Credit: Common Ground Trails

GIPPSLAND

Figure 22. GIppsland

| Victorian Mountain Bike Strategy

GIPPSLAND

Gippsland is located in the southeast of Victoria. This region is rich in natural assets, wild coastlines, rolling green hills, character filled country towns, and national parks including Mount Baw Baw, Wilson's Promontory and Tarra Bulga National Park. Gippsland is one of the most mountainous regions in the state as the northern border passes through the Great Alpine National Park.

Credit: Australian Cycling Holidays

Recommended Scale of Development	Medium
Priority	Very High
Tourism Region	Gippsland
Local Government Areas	Baw Baw Wellington Latrobe South Gippsland East Gippsland
DELWP Regions	Gippsland
Relevant Land Managers	Parks Victoria DELWP Local Government
Mountain Bike Clubs	Gippsland MTB Inc Mountain Biking East Gippsland Prom Coast Mountain Bike Club
Registered Aboriginal Parties	Gunaikurnai People – Represented by Gunaikurnai Land and Waters Aboriginal Corporation Bunurong People – Represented by Bunurong Land Council Aboriginal Corporation
Key Features Parks and Reserves	Agnes Falls Scenic Reserve Alpine National Park Baw Baw National Park Buchan Caves Reserve Cape Conran Coastal Park Croajinolong National Park Gabo Island Lighthouse Reserve Gippsland Lakes Coastal Park Marlo Coastal Reserve Raymond Island Gippsland Lakes Reserve Tarra-Bulga National Park The Lakes National Park Wilsons Promontory Marine National Park Wilsons Promontory National Park Yallock Bulluk Marine and Coastal Park

EXISTING TRAILS

ID	Location	Facility Name	Length	Trail Types
1	Lakes Entrance	Colquhoun Mountain Bike Park	31	Cross Country, All Mountain,
2	Mount Taylor	Mount Taylor Mountain Bike Park	29	Cross Country, All Mountain, Downhill
3	Heyfield	Blores Hill Mountain Bike Park	28	Cross Country, All Mountain,
4	Morwell	Maryvale Pines Mountain Bike Trails	25	Cross Country, All Mountain, Downhill
5	Nowa Nowa	Nowa Nowa Mountain Bike Park	20	Cross Country, All Mountain, Downhill
6	Toongabie	Somewhere Good Mountain Bike Trails	16	Cross Country
7	Erica	Erica Mountain Bike Park	14	Cross Country, All Mountain,
8	Mount Baw Baw	Mount Baw Baw Mountain Bike Trails	11	Cross Country, All Mountain, Downhill
9	Foster	Foster Mountain Bike Park	6	Cross Country, All Mountain,

SCALE

- Gippsland is home to 256,000 people and is expected to grow by 23% to 298,000 people in 2036.

- In 2019, Total Domestic Tourism Expenditure was $1080 million. Total International Overnight Expenditure was $38 million.

- There is a V-Line train service to Bairnsdale, which runs regular services to Traralgon. A significant proportion of the population in Gippsland is distributed along this train line.

- All of Gippsland is accessible by car, however it is a large region therefore the areas of Gippsland closer to Melbourne will be more accessible and accessible to a larger population. In the Social Pinpoint Rider Survey, riders indicated they would be willing to travel 2.5 hours for a day trip, and up to 4-5 hours for a weekend trip. Consideration of this willingness to travel should be considered in regional planning undertaken for this region.

- Coastal towns including Inverloch and Lakes Entrance are popular in summer. Wilson's Promontory is one of Victoria's premier nature tourism destinations and is popular with hikers and campers for short to multi-day bushwalks.

OPPORTUNITY

- The terrain in Gippsland presents an excellent opportunity for mountain bike trails. Gippsland includes the southern side of the Great Dividing Range and has attractive elevation for gravity mountain bike trails. In the MCA for this Strategy, the elevation opportunity in Gippsland ranked second in the state behind the High Country.

- There is significant opportunity in Gippsland for the development of mountain bike trail networks, to drive an increase in tourism spend in the region.

- There is opportunity for Gippsland to increase the amount spent per visitor in the region. In 2019, Gippsland had the lowest spend per night for overnight visitor expenditure in Victoria. In 2019 domestic overnight visitors spent on average $80 less per night in Gippsland, than when visiting the High Country which had the highest spend per night. Gippsland had a higher number of domestic visitor nights spent in the region.

- The Total Domestic Overnight Expenditure in Gippsland was approximately $375 million less than Victoria's High Country, even though there were more nights spent in the region. This indicates that Gippsland would do well to focus on increasing the amount that visitors spend in the region. If every overnight visitor increased their spend per night from $100 to $180, this would translate to an increase of $400 million in the region annually based on 2019 data.

- Future mountain bike destinations in Gippsland that intend to increase tourism expenditure, will do well to ensure there is a strong integration between the trails and towns to capture this spend. Towns will need to foster trail friendly businesses with quality accommodation, cafes and restaurants to ensure that the higher tourism spend is encouraged. Comments in the rider survey indicated that people also like to be able to ride from town to the trails. Support services such as shuttle services and guiding and tour businesses can also attract a higher tourism spend.

- High quality trails are also a primary reason for travel to a mountain bike destination. The Social Pinpoint rider survey indicated that the primary reason people travel for a trail holiday is the quality of the trails. Design, planning and construction of high quality trails, as well as regular, high quality maintenance is essential to attract and retain mountain bike tourists.

- There are numerous current initiatives and projects aimed at increasing the mountain bike offering in Gippsland. These are captured in the Gippsland Tracks and Trails Feasibility Study and include Omeo Mountain Bike Destination, Baw Baw Epic Trail and the G7 Mountain Bike Hub.

- There is an opportunity with the development of the G7 mountain biking hub to incorporate the promotion of these multiple smaller, varied trail networks into the current 'Land of little wonders' Gippsland tourism campaign.

- There are numerous local and regional scale mountain bike networks in Gippsland, as well as recent investment in five asphalt pump tracks in Wellington Shire. These networks each have the opportunity to develop a unique and distinctive marketing campaign to attract different segments of the mountain bike market. As an example, Colquhoun Mountain Bike Park is close to Lakes Entrance and features beginner and intermediate trails. There is a small dire surfaced pump track at the entrance of the trail. This network is a small, local scale network, approximately 3 hours drive from Melbourne. The scale of the network and distance of the trails from Melbourne, means it is unlikely that Melbourne riders will travel here for a day or weekend trip. However, the network could be promoted in conjunction

with other attractions in the area to attract families wanting a holiday full of outdoor recreation, including mountain biking.

- Three additional aspirational riding locations were identified through the Social Pinpoint survey.

DELIVERABILITY

- There are three mountain bike clubs in Gippsland, the Gippsland MTB Club Inc, Mountain Biking East Gippsland and Prom Coast Mountain Bike Club.

- In 2021, the Victorian Downhill Series State Championships was held at Mount Baw Baw.

- There were only three locations identified in the Social Pinpoint Rider Survey, which when compared to the amount of riding locations identified in other regions, indicates that Gippsland is not currently known as a mountain bike destination.

- The Gippsland Region Tracks and Trails Feasibility Study is an important planning document in the Gippsland region. Regional planning ensures that LGAs can collaborate and address cross-boundary issues, as well as promote the trails product under one cohesive 'Gippsland' brand.

- Recent development such as investment in the Omeo Mountain Bike trails, Wellington Shire pump tracks, the Baw Baw Epic trial and the G7 mountain bike hub indicate that the Gippsland region is developing a range of mountain bike products to provide for local communities and capture a share of the mountain bike tourism market.

- Analysis of Trailforks data indicated that Maryvale Pines is ranked 9th in the state for visitation and fourth for repeat visitation by riders. This network is important for recreational riders from Traralgon and surrounding towns. It is currently the most popular network in Gippsland.

- Gippsland's trail networks have a relatively lower visitation than other networks closer to Melbourne. Improved trails, trail facilities and promotion, could encourage riders from Melbourne to travel to the Gippsland networks.

- The Outer Eastern Regional Mountain Bike Strategy includes one LGA from this region, Baw Baw Shire.

Credit: Australian Cycling Holidays
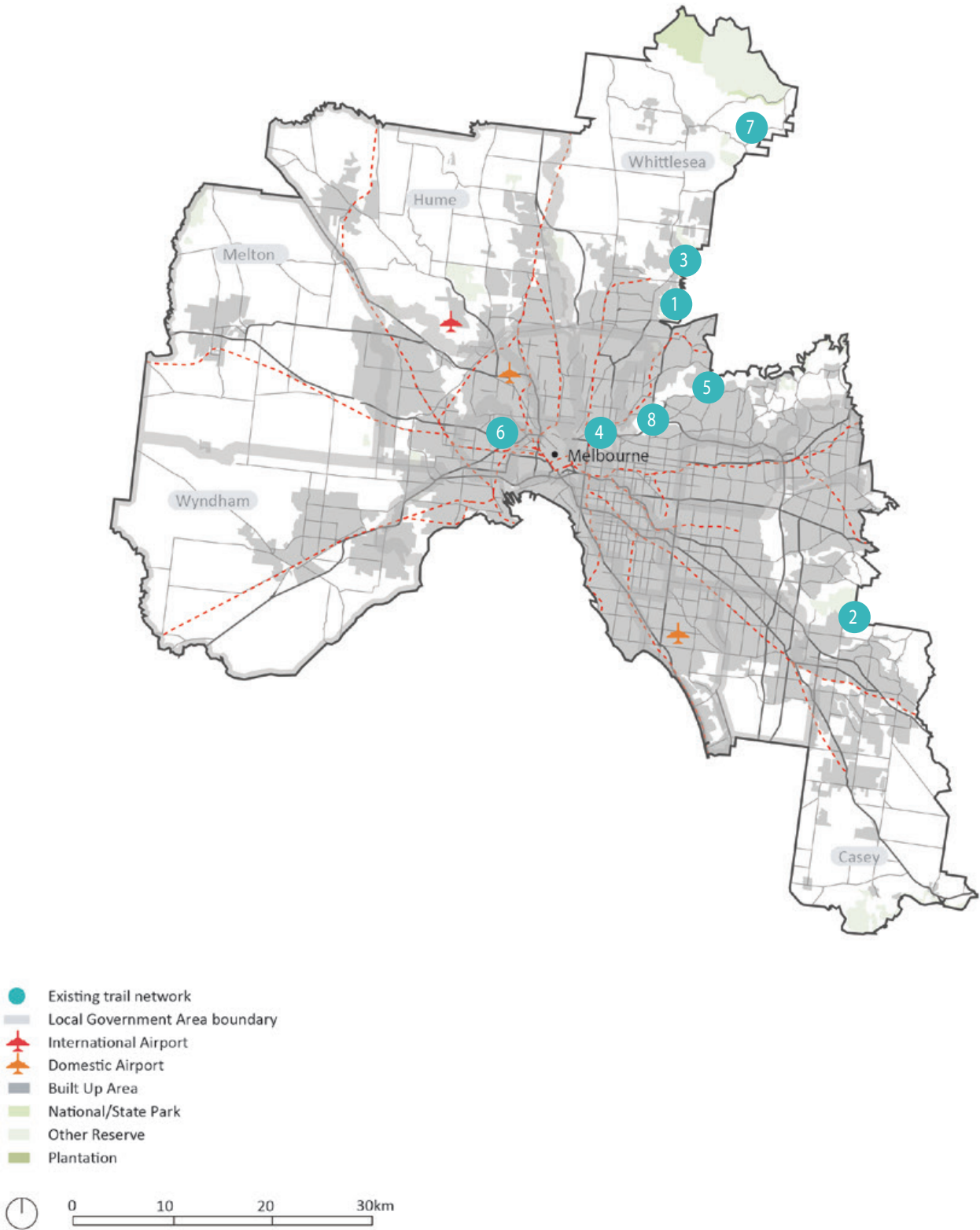
Figure 23. Metropolitan Melbourne

Legend:
- Existing trail network
- Local Government Area boundary
- International Airport
- Domestic Airport
- Built Up Area
- National/State Park
- Other Reserve
- Plantation

0   10   20   30km

MELBOURNE

Melbourne is the second most populated city in Australia. The city is a cultural centre, with laneways and street art, retail shopping, high quality restaurants, theatres, live music, and galleries. As Victoria's sporting capital, Melbourne hosts many major sporting events including the Australian Open, the Boxing Day test cricket and the AFL grand final.

Credit: Parks Victoria

Recommended Scale of Development	Very High
Priority	High
Tourism Region	Melbourne
Local Government Areas	Banyule, Bayside, Booroondara, Brimbank, Casey, Darebin, Glen Eria, Greater Dandenong, Hobsons Bay, Hume, Kingston, Knox, Manningham, Maribyrnong, Maroondah, Melbourne, Melton, Monash, Moonee Valley, Moreland, Port Phillip, Stonnington, Whitehorse, Whittlesea, Wyndham, Yarra City
DELWP Regions	Port Phillip
Relevant Land Managers	Parks Victoria DELWP Local Government
Mountain Bike Clubs	Brunswick Cycling Club Plenty Gorge MTB St Kilda Cycling Club Warrandyte Mountain Bike Club Westside Cycling Club Sunbury Cycling Club The Fitzroy Revolution MTB Club
Registered Aboriginal Parties	Wurundjeri People – Represented by Wurundjeri Woi Wurrung Cultural Heritage Aboriginal Corporation Bunurong People – Represented by Bunurong Land Council Aboriginal Corporation Wadawurrung People – Represented by Wadawurrung Traditional Owners Aboriginal Corporation
Key Features Parks and Reserves	Albert Park Organ Pipes National Park Plenty Gorge Parklands Ricketts Point Marine Sanctuary St Kilda Pier and Breakwater Werribee Park Yarra Bend Park Yarra River Yarra Valley Parklands

EXISTING TRAILS

ID	Location	Facility Name	Length	Trail Types
1	Plenty Gorge	Plenty Gorge Parklands	49	Cross Country, All Mountain, Downhill
2	Lysterfield	Lysterfield Park Mountain Bike Trails	32	Cross Country, All Mountain, Downhill
3	Norge	North Plenty Gorge Parklands	28	Cross Country
4	Yarra Bend Park	Yarra Bend Park	14	Cross Country, All Mountain
5	Westerfolds Park	Westerfolds Park & Candlebark Park Mountain Bike Trails	13	Cross Country, All Mountain, Downhill
6	Footscray	Footscray Quarry Park	1	All Mountain
7	Humevale	Humevale Mountain Bike Trails	8	Cross Country
8	Greensborough	Eaglemont Dirt Jumps		Park

SCALE

- The Metropolitan Melbourne tourism region is home to approximately 4.5 million people. It is projected to grow by 47% to nearly 6 million people in 2036, it is unclear if COVID-19 and reduced immigration will affect these projections.

- The Metropolitan Melbourne tourism region includes LGAs Banyule, Bayside, Booroondara, Brimbank, Casey, Darebin, Glen Eria, Greater Dandenong, Hobsons Bay, Hume, Kingston, Knox, Manningham, Maribyrnong, Maroondah, Melbourne, Melton, Monash, Moonee Valley, Moreland, Port Phillip, Stonnington, Whitehorse, Whittlesea, Wyndham, Yarra City.

- Melbourne has the highest tourism expenditure in the state. In 2019 the Total Domestic Tourism Expenditure in this region was approximately $12 billion. Total Overnight International Expenditure in 2019 was $8 billion. Melbourne is extremely well placed to attract international and domestic tourists for mountain bike events.

- Melbourne region has the highest MCA scale score in the state. Although Melbourne scored lower on deliverability and opportunity, the scale of the trails required to cater adequately for demand is highest in this region.

- Melbourne region is highly accessible. It has multiple airports including Tullamarine Domestic and International Airport. There is also a good network of shared use cycle paths across the city as well as a train network where bikes can be carried.

OPPORTUNITY

- An analysis of visitation at all the mountain bike parks in the state, revealed was a clear trend of high visitation to trail networks in this region. Trailforks data indicated that Four of the top five most visited parks are in the Melbourne region are Lysterfield, Yarra Bend Park, Westerfolds/Candlebark Park and Plenty Gorge were all in the top five most visited trail networks in the state.

- Despite the high visitation at these networks, not all the trails are sanctioned or planned to best practice.

- The rider survey indicated that all networks in inner-city Melbourne were identified as needing to be better maintained, and there was a strong desire to formalise the trails and better support them.

- There is an opportunity to cater for the significant mountain biking demand in this region. Local and Regional scale mountain bike facilities in this region should have a particular focus on catering for recreational rides and skill progression as well as being dispersed throughout the city. Facilities to cater for this demand can include trail networks, pump tracks, skills parks and jumps parks. Co-location with existing facilities, especially sports precincts and skate parks can create a hub of activity and participation.

- There is an opportunity within Melbourne to attract new participants to the sport, by creating riding opportunities in new neighbourhoods and close to people's homes. Design of these facilities, as well as complementary sports programs including coaching, can be focused on increasing the diversity of participants in the sport.

- Numerous LGAs indicated that they have recently recognised the increase in demand for mountain bike trails, and the Melbourne Lockdowns exacerbated this demand. Several LGAs indicated they are looking at ways to plan for mountain bike infrastructure.

- There were a total of 26 locations suggested as potential mountain bike locations for the Melbourne region in the rider survey. This was the highest number of locations suggested for a region, and further indicates the high demand for recreational riding opportunities in this region.

DELIVERABILITY

- There are four AusCycling affiliated clubs in Melbourne. This includes Brunswick Cycling Club, Plenty Gorge MTB, St Kilda Cycling Club, and Warrandyte Mountain Bike Club. There are many more informal recreational riding groups in Melbourne.

- There are also multiple retail outlets across Melbourne who sell mountain bikes. Several of these stores organise 'shop rides' where staff and members of the riding community ride together. These shop rides help connect new riders to the broader mountain bike community.

- The greatest challenge in catering for demand within Melbourne is land availability. Competing community demand for recreation, and alternative uses of the land highlight the need for detailed regional planning, to ensure that recreational mountain biking can be catered for across Melbourne.

- A regional master plan that considers how to cater for demand in a cohesive and balanced way as well as detailed local planning in key sites. Regional planning can ensure that facilities are well connected and accessible by creating links to shared paths and train networks.

- The Outer Eastern Regional Mountain Bike Strategy includes one LGA from this region, the City of Casey.
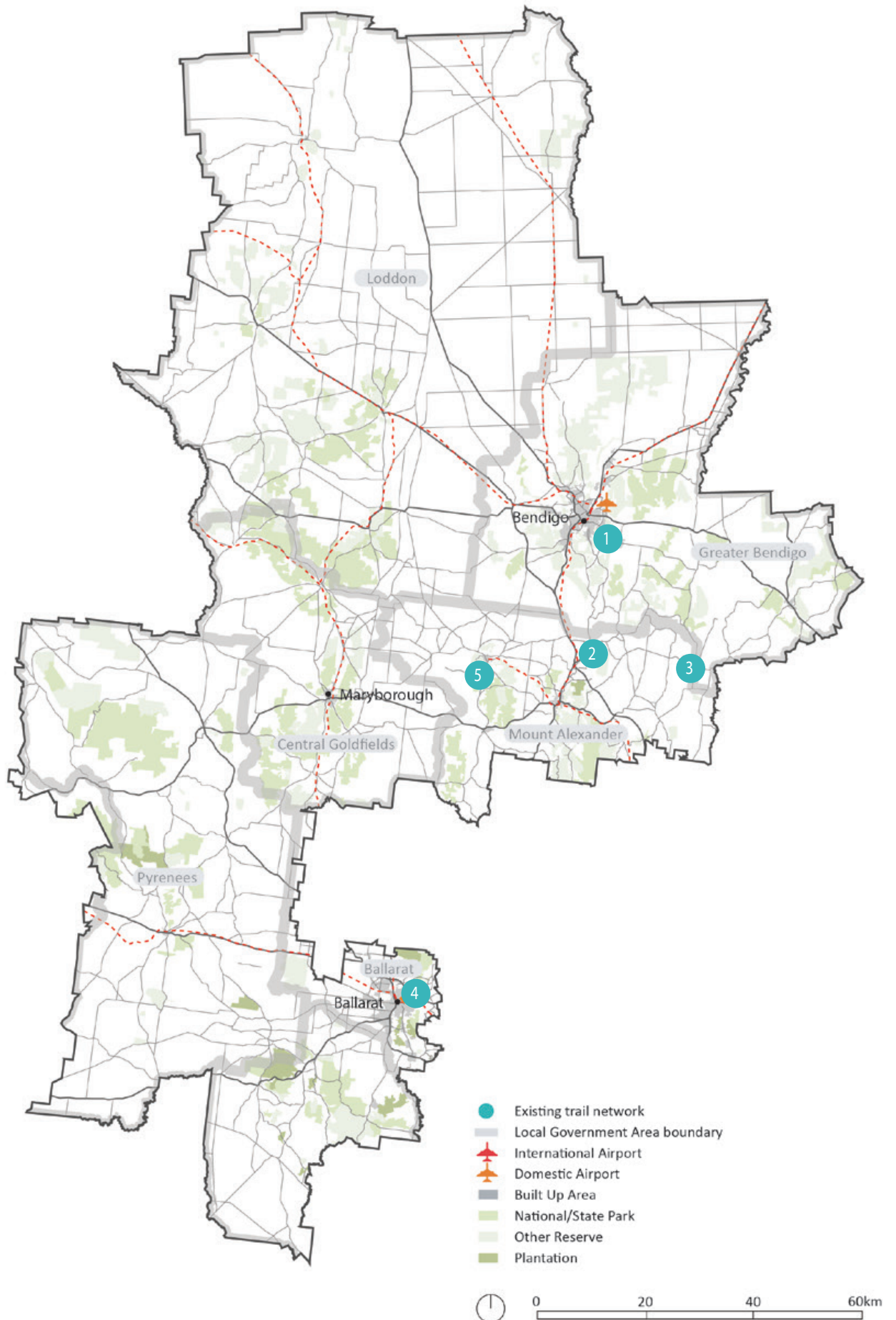
GOLDFIELDS

Figure 24. Goldfields

Legend:
- Existing trail network
- Local Government Area boundary
- International Airport
- Domestic Airport
- Built Up Area
- National/State Park
- Other Reserve
- Plantation

0   20   40   60km

GOLDFIELDS

The Goldfields region celebrates the legacy of Victoria's gold rush. Two of Victoria's biggest regional cities Ballarat and Bendigo are situated in this region. Tourists can take in the heritage streetscapes of gold-rush towns, peruse the art galleries, or explore the outdoors on the 210km Goldfields Track.

Recommended Scale of Development	High
Priority	Very High
Tourism Region	Goldfields
Local Government Areas	Ballarat Pyrenees Loddon Greater Bendigo Central Goldfields Mount Alexander Golden Plains (partially – Golden Plains LGA is shared with Geelong and the Bellarine).
DELWP Regions	Grampians, Loddon Mallee
Relevant Land Managers	Parks Victoria DELWP Local Government
Mountain Bike Clubs	Bendigo Mountain Bike Club Castlemaine Rocky Riders Ballarat/Sebastopol Mountain Bike Club Inc Club Mud Ballarat
Registered Aboriginal Parties	Dja Dja Wurrung People – Dja Dja Wurrung Clans Aboriginal Corporation Wadawurrung People - Represented by Wadawurrung Traditional Owners Aboriginal Corporation Eastern Maar People - Represented by the Eastern Maar Aboriginal Corporation Taungurung People – Represented by Taungurung Land and Waters Council Aboriginal Corporation
Key Features Parks and Reserves	Castlemaine Diggings National Heritage Park Greater Bendigo National Park Mount Buangor State Park Woowookarung Regional Park

Credit: Common Ground Trails

EXISTING TRAILS

ID	Location	Facility Name	Length	Trail Types
1	One Tree Hill	Bendigo	122	Cross Country, All Mountain, Downhill
2	La larr Ba Gauwa	Harcourt	35	Cross Country, All Mountain,
3	Mount Lofty	Redesdale	14	Cross Country, All Mountain, Downhill
4	Black Hill	Ballarat	13	Cross Country, All Mountain, Downhill
5	Mt Tarrengower	Maldon	7	All Mountain, Downhill
6	Castlemaine	Walmer State Forest Mountain Bike Trails	59	Cross Country

SCALE

- The Goldfields region contains two of Victoria's largest regional towns, Bendigo and Ballarat.
- In 2021 the region's population was approximately 290,000 and is expected to grow by 33% to 36,000 by 2036.
- in 2019 total domestic tourism expenditure in the Goldfields region was $1323 million.
- Total international overnight expenditure was $51 million.
- Major population centres in the Goldfields are readily accessible by train and there are regular V-Line services from Melbourne to Bendigo and Ballarat.
- Bendigo is approximately two hours drive from Melbourne, and Ballarat is approximately one and a half hours drive. The region is most easily accessed by car, especially if travelling outside these cities. The closest airport to the Goldfields region is Melbourne Tullamarine domestic and international airport.

OPPORTUNITY

- The Goldfields region is full of interesting terrain for mountain biking, mining heritage, and is typically drier than the east of the state, making the region a good location for winter riding. It is also accessible from Melbourne for day or weekend trips.
- There was a total of 7 locations suggested as potential for mountain biking in the rider survey.
- There are several mountain bike parks in the Goldfields, as well as one of Victoria's longest formalised bikepacking routes, the 210 km Goldfields Track. The Goldfields track extends from Bendigo to Ballarat, and travels through Harcourt, Castlemaine, Daylesford and Creswick.
- There is opportunity to promote the Goldfields Track and its connectivity to the mountain bike parks. As a package, the Goldfields Track, La Larr Ba Gawa, and the proposed Creswick Trails, have the potential to generate interstate domestic travel to the region. The Goldfields Track is unique in its accessibility, as both ends of the trail can be accessed by train from Melbourne CBD, making it easy to get to both ends of the trail, and accessible from the airport. The trail also showcases interesting country towns with a range of accommodation and dining options. The Goldfields history and the mineral springs are an integral part of the trail experience and a key point of difference to other bikepacking routes in Australia.
- Catering for the recreational needs of riders in Bendigo was also a gap identified in the Social Pinpoint Rider Survey. In Bendigo there is a large network of unsanctioned trails, especially in One Tree Hill regional reserve and surrounds, also known as Spring Gully. There is 5km of formalised trails in this region, and Trailforks data indicates 100km+ of trails. The significant gap between sanctioned and unsanctioned km of trails in Bendigo, stood out compared to other areas of the state.
- There is a formalised trail network, La Larr Ba Gauwa (Harcourt) which is a 30 minute drive from Bendigo. In the rider survey, riders indicated that they typically ride 2 - 3 times per week and look for somewhere closer to home to ride, preferably within riding distance from their home. The rider survey indicated demand for more formalised trails surrounding Bendigo to cater for mid-week visitation.
- The Spring Gully Trail Network Master Plan (2017) developed by the City of Bendigo and the Bendigo Mountain Bike Club has a vision to create a sustainable network of trails in this area in consultation with key stakeholders including Parks Victoria.
- Further local and regional planning in this region can assist with:
  - Identifying potential alternative locations to cater for demand and places to ride in Bendigo
  - Reducing the construction of unsanctioned trails and associated risks
  - Improving the sustainability and function of trails.
- In Ballarat there are trails at Black Hill which cater for intermediate to very advanced riders and include three double black diamond trails.
- Trails in Woowookarung Regional Park cater for beginner to intermediate riders. There is an existing network of unsanctioned trails in this park that have longstanding historical use by the Ballarat Mountain Bike Club. The club uses a 12km loop known as the 'Canadian Enduro Loop' for events. The Parks Victoria 2018 Woowookarung Regional Park Master Plan identifies that shared use beginner-intermediate trails will be a future priority in the park.

Consultation is continuing between Ballarat Mountain Bike Club and Parks Victoria regarding the closure of segments of the existing 'Canadian Enduro Loop' due to it being an unsanctioned trail with riders and walkers spreading fungus to other areas within the Park.

- Two new asphalt pump tracks are in construction at Ballarat and Wendouree.

DELIVERABILITY

- There are four mountain bike clubs in the Goldfields region, Bendigo Mountain Bike Club, Castlemaine Rocky Riders, Ballarat/Sebastopol Mountain Bike Club and Club Mud Ballarat.

- Bendigo Mountain Bike Club hosts regular events, skills sessions and training sessions and has a strong focus on encouraging participation by women and people of all ages.

- In 2019, Club Mud Ballarat hosted the annual King of Ballarat, where each round attracted approximately 150 participants.

- Castlemaine Rocky Riders host multiple social events including their 'Timeless Winter Series' and regular social rides.

- Parts of the Goldfields region are incorporated in the Grampians Regional Development Victoria Region Cycling and Trails Infrastructure Business and Masterplan. Several Mountain Bike projects are suggested in this plan.

- Further regional planning to understand the demand for mountain bike facilities across the whole Goldfields region will assist to plan for future growth and identify key projects to meet this demand.
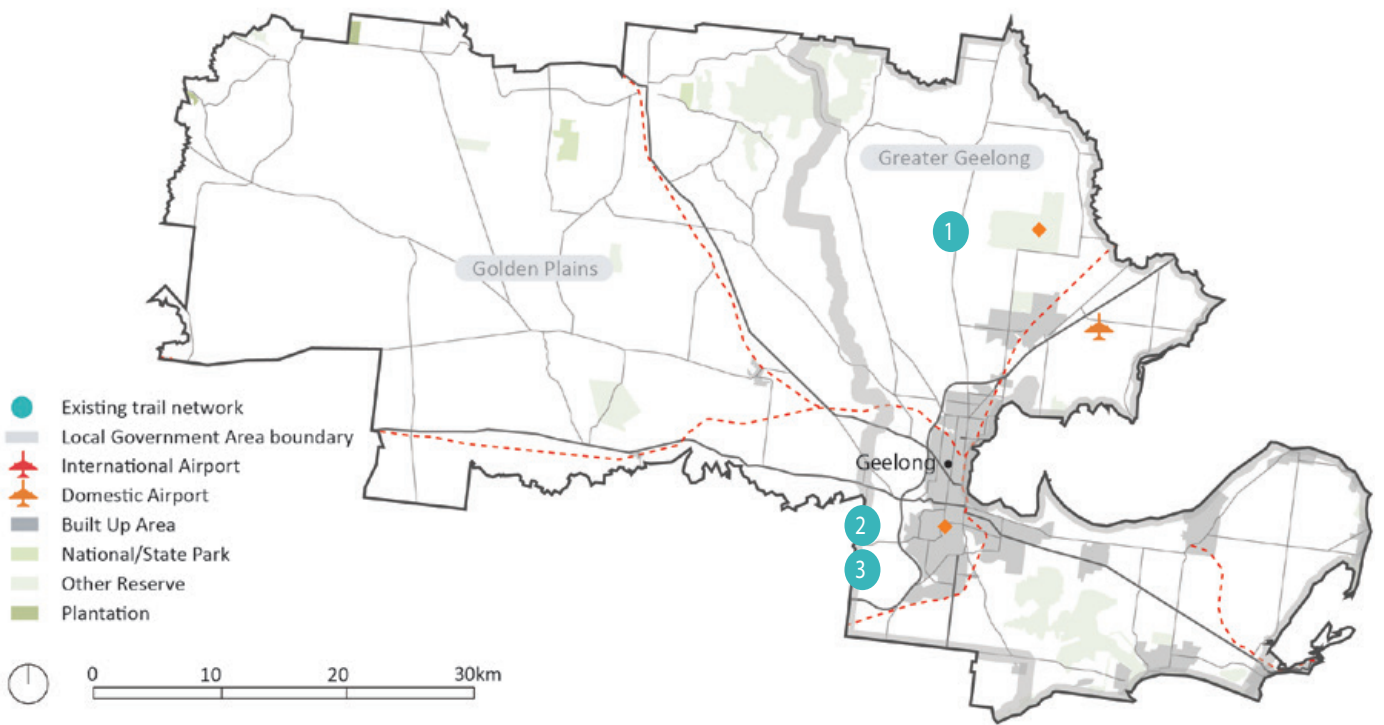
GEELONG AND THE BELLARINE

Figure 25. Geelong and the Bellarine Peninsula

Credit: Common Ground Trails

GEELONG AND THE BELLARINE

Geelong and the Bellarine Peninsula is a region south west of Melbourne. This region is predicted to see the greatest rise in population growth in Victoria over the next ten years. Well connected by rail to Melbourne and close to Avalon airport, the region is highly accessible and known for eateries, boutique shopping experiences, coastal walks, wineries and Geelong Gallery. Located in this region, You Yangs is a popular National Park with mountain biking and hiking trails.

Credit: Common Ground Trails

Recommended Scale of Development	Very High
Priority	High
Tourism Region	Geelong and the Bellarine Peninsula
Local Government Areas	Greater Geelong Queenscliff Golden Plains (partially – Golden Plains LGA is shared with Goldfields region)
DELWP Regions	Barwon South West, Grampians
Relevant Land Managers	Parks Victoria DELWP Local Government
Mountain Bike Clubs	Geelong Mountain Bike Club You Yangs Mountain Bike Inc
Registered Aboriginal Parties	Wadawurrung People – Wadawurrung Traditional Owners Aboriginal Corporation Eastern Maar People – Represented by the Eastern Maar Aboriginal Corporation
Key Features Parks and Reserves	Barwon Bluff Marine Sanctuary You Yangs Regional Park

EXISTING TRAILS

ID	Location	Facility Name	Length	Trail Types
1	You Yangs Regional Park	You Yangs Mountain Bike Park	50	Cross Country, All Mountain, Downhill
2	Geelong	The Hill Mountain Bike Park	1	Pump track/ Jumps Park
3	Waurn Ponds	Waurn Ponds Dirt Jumps		Park

SCALE

- In 2021 the population of Geelong and the Bellarine Peninsula was 290,000 people. This region is expected to see the most significant growth in the state and is expected to grow by 51% to 387,000 people by 2036.

- Currently, Geelong and the Bellarine are the sixth most populated region in the state. By 2036 Geelong and the Bellarine is projected to be the third most populated region in the state.

- The projected growth in this region is expected to be so significant that the population of Geelong and the Bellarine will overtake both the Mornington Peninsula region and the Goldfields Region, which contains the combined population of Ballarat and Bendigo.

- Geelong and the Bellarine are one of the most accessible regions in Victoria. It is one hour's drive from Melbourne. There are multiple routes to travel from Melbourne's international and domestic airports to Geelong. Geelong is well serviced by regular V-Line services which leave Southern Cross Station approximately every 20 minutes Monday to Friday and every 40 minutes on weekends. These are the most regular V-Line train services in Victoria.

- In 2019 the Total Domestic Tourism Expenditure for this region was $1040 million and the Total International Overnight Expenditure was $94 million.

OPPORTUNITY

- Catering for a growing population as well as the growth in participation in mountain biking presents some challenges or this region as well as opportunities.

- There is opportunity to meet the demand for places to ride and recreation outdoors by creating a series of riding experiences surrounding Geelong. The Hill Mountain Bike Park is a great example of site repurposed and developed into a centrally located local mountain bike facility. The Hill is very popular however does experience maintenance challenges as identified via consultation for this Strategy.

- There is opportunity to create a partnership between the council and the local mountain bike club to assist in maintenance.

- There was a total of 9 potential new riding locations identified in the Social Pinpoint rider survey. This included suggestions for a skills park in the You Yangs, Mount Dundeed Recreation Reserve, the Brisbane Ranges, and along the Barwon River. Local and regional planning would need to be conducted to determine the feasibility of any of these options.

- The You Yangs is a key sanctioned mountain bike trail network in Victoria. It plays an especially important role in catering for the 'weekend warriors' from Geelong and Melbourne. While visitation to You Yangs is high, the park is not located close to cafes or other small businesses, there is an opportunity to promote nearby townships to encourage riders to visit these prior to or after a ride, especially the township of Lara, and thus maximising the tourism potential of the park.

- There is also significant opportunity to improve the maintenance and update the network at You Yangs to cater for growing demand. The You Yangs is described as 'having something for everyone' catering for beginners to expert riders. Respondents to the rider survey suggested that the network would benefit from some design tweaks to handle the growth in demand, including making some trails one way, and connecting the Kurrajong and Stockyards sections of the network. More gradual skill progression between trails at this network was also desired.

- Further local planning of this network is recommended to assess how the network can be managed and maintained to cater for the growing especially as the population in this region grows.

DELIVERABILITY

- There are two Mountain Bike clubs in the region, Geelong Mountain Bike Club and You Yangs Mountain Bike Inc.

- The You Yangs Network is regular hosts events including round five of the 2019 Victorian Downhill series. Geelong Mountain Bike Club and You Yangs Inc are both active in hosting events, kids programs and women's social rides.

- This region has collaborated with the Great Ocean Road tourism region to develop the Growing Adventure Tourism in Barwon South West Region Cycle Tourism Strategy- 2015 - 2025). An objective of this strategy was to establish three international/national cycle trail experiences by 2025 and suggests assessing the investment requirements for the You Yangs hub to gain International/National recognition as mountain bike destination aiming to significantly extend the trail networks by 2025.

- LGAs in this region are maturing in their understanding of mountain bike infrastructure and management. Lockdowns associated with the COVID-19 pandemic saw an increase demand in this region for dirt jumps and trails. Feedback received via the LGA questionnaire noted that You Yangs does not provide for teenagers and children who are unable to travel to the trails without a vehicle and assistance from others.

- Consultation with LGAs identified that many of the unsanctioned trails were being built by riders seeking a higher difficulty riding experience. There is an opportunity for collaboration between LGAs and the community to develop a mutual understanding of the trail development process and establish appropriate governance models into the future.
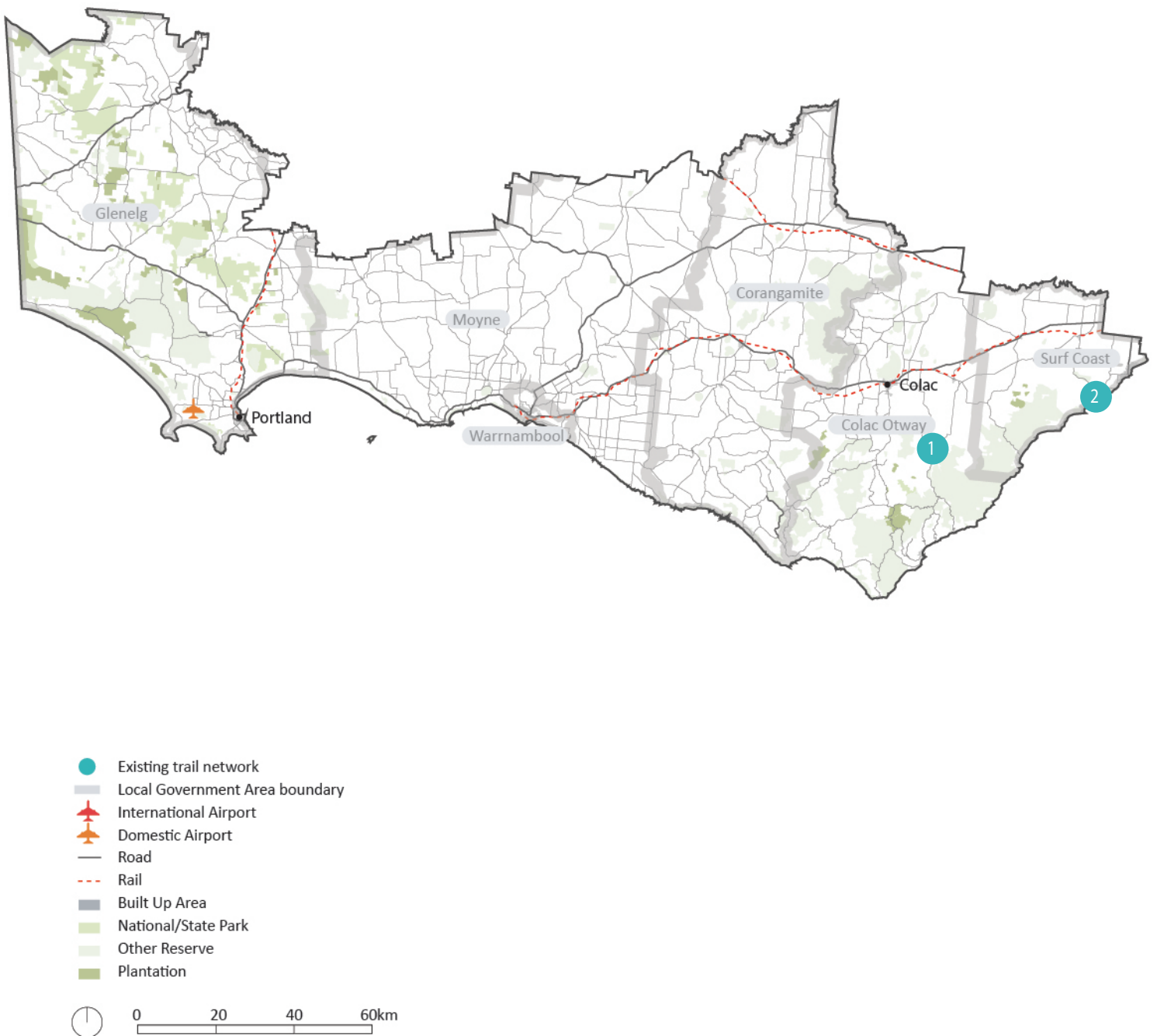
GREAT OCEAN ROAD

Figure 26. Great Ocean Road

GREAT OCEAN ROAD

The Great Ocean Road region is one of Victoria's premier nature tourism destinations. The region hugs the southwest coast of Victoria from the South Australian border to Geelong. Major attractions are the Twelve Apostles, the Otways National Park, surf coast, and volcanic plains. There are multiple live music festivals in the region including Port Fairy Folk Festival and Falls Festival in Lorne, both of which draw large crowds.

Credit: Flow Mountain Bike

Recommended Scale of Development	Medium
Priority	Medium
Tourism Region	Great Ocean Road
Local Government Areas	Glenelg Moyne Corangamite Colac Otway Surf Coast Warrnambool
DELWP Regions	Barwon South West
Relevant Land Managers	Parks Victoria DELWP Local Government
Mountain Bike Clubs	Surf Coast Mountain Biking Club Warrnambool Mountain Bike Club Forrest MTB and Cycling Club Inc
Registered Aboriginal Parties	Gunditjmara People – Represented by Gunditj Mirring Traditional Owners Aboriginal Corporation Eastern Marr People – Represented by the Eastern Maar Aboriginal Corporation Wadawurrung People – Represented by Wadawurrung Traditional Owners Aboriginal Corporation
Key Features Parks and Reserves	Bay of Islands Coastal Park Belfast Coastal Reserve Budj Bim National Park Discovery Bay Coastal Park Great Otway National Park Lower Glenelg National Park Port Campbell National Park Tower Hill

EXISTING TRAILS

ID	Location	Facility Name	Length	Trail Types
1	Forrest	Forrest Mountain Bike Park	74	Cross Country, All Mountain
2	Anglesea	Anglesea Bike Park and Trail Network	16	Cross Country, All Mountain
3	Portland	Mount Clay Bike Trail	8	Cross Country
4	Warrnambool	Warrnambool Thunder Point Coastal Reserve	6	Cross Country

SCALE

- The Great Ocean Road region is home to 144,000 people and is forecast to grow by 15.4% to approximately 160,000 people by 2036.

- The Great Ocean Road region is one of Victoria's premier tourism destination and the brand is well regarded and recognised domestically and internationally.

- In 2019 Total Domestic Tourism Expenditure was $1462 million. This is the third highest domestic tourism expenditure in the state, behind Melbourne and the Murray Regions.

- In 2019 Total International Overnight Expenditure was $114 million.

- The region is easily accessible by road and is a major driving tourism route The Great Ocean Road. It is well serviced by a V-Line train from Geelong to Warrnambool and is It is also a driving route from Melbourne to Adelaide.

- Warrnambool is the major town in the Great Ocean Road region with a population of approximately 35,000 people. Population is also distributed along the surf coast closer to Geelong including towns Torquay, Lorne and Anglesea

OPPORTUNITY

- The Great Ocean Road is a well renowned driving route and is recognised domestically and internationally Features include the Twelve Apostles, Loch Ard Gorge, and the world famous surf beaches including Bells Beach and Jan Juc.

- Several significant music festivals are held in this region each year including the Port Fairy Folk Festival attracting approximately 12,000 attendees and Falls Festival in Lorne attracting approximately 13,000 attendees.

- The region is known for spectacular outdoor landscapes and has many popular walks along the coast. The eight day 110km Great Ocean Road Walk is an iconic multi-night walk in Victoria and follows the coast from Apollo Bay to the Twelve Apostles. Parks Victoria website lists nine licensed tourism operators supporting guided experiences along walk indicating the business and tourism potential this walking experience offers.

- There was are total of 5 pins placed as potential riding locations in the Social Pinpoint rider survey, including in the Otways, Budj Bim, Tower Hill, Merri River and a Forrest to Lorne Epic trail. Further regional and local planning would be required to determine the feasibility of these suggestions.

- With neighbouring Geelong and the Bellarine expected to see significant population growth, there is an opportunity for the Great Ocean Road region to provide for this growing population and expected demand for places to ride by delivering additional regional mountain bike networks closer to Geelong. Trail assets within easy day trips from Geelong provide an opportunity to encourage repeat visitation and overnight stays.

- Overall, it was identified that there is a gap in the number of trail networks on the western side of the state. The MCA indicated that the Great Ocean Road region has pockets of attractive elevation that could suit a mountain bike trail network.

DELIVERABILITY

- There are three mountain bike clubs in the region, Forrest MTB and Cycling Club, Surf Coast Mountain Bike Club and Warrnambool Mountain Bike Club.

- There are several commercial operators in the region providing mountain bike tours, bike sales and coaching sessions and advocate for mountain bike riding in the surf coast region.

- The region has an enthusiastic local mountain bike population and supportive LGAs. LGAs in this region typically have a good understanding of mountain bike trail networks and associated infrastructure and were responsive to the LGA Questionnaire.

- This region has collaborated with the Geelong and the Bellarine Peninsula region to develop Growing Adventure Tourism in Barwon South West Region Cycle Tourism Strategy, 2015 – 2020. An objective of this strategy is to establish three international/national cycle trail experiences by 2025 and suggests an expansion to the Forrest Trail Network and well as assessing the feasibility of an Epic Ride between Torquay, Lorne, Forrest and Apollo Bay.

- The Surf Coast Mountain Bike Club and Surf Coast Shire Council are exploring opportunities for a formalised trail network to cater for locals and complement existing tourism in this area. With the current bike park on Alcoa land which is leased it to Surf Coast Shire, the longevity of this facility is under question with Alcoa permanently ceasing operations at Anglesea Mine and Power Station in 2015.

- One of the first formalised mountain bike networks in Victoria, the Forrest Mountain Bike Trail Network has been in operation since 2005 and has provided economic benefits to the town. With the ceasing of the logging industry in the Otways in 2005, the mountain bike trails have assisted with transitioning the economy from forestry to tourism. Forrest Mountain Bike Trail Network has a strong brand positioning as 'fun, family friendly trails.'

- The Forrest trail network is undergoing a major upgrade to retain and grow its market share of the mountain bike community and industry. The Forrest Mountain Biking Revitalisation Project with see an additional 38km of trail and improved equestrian and walking trails. The reworked product will have a mixture of Flow, CX, Adaptive and Enduro products with lots of technical features and jumps, and a skills park and visitor precinct. Forrest has also recognised the opportunity to create a large gravel network. The project to rework this network is hoping to grow the number of annual riders from 25,000 to 49,500 per annum.

- Glenelg Shire has recently installed three plywood composite modular pump tracks in Heywood and an asphalt pump track in Casterton. A modular concrete pump track is about to be installed in the Shire to complement existing bike facilities.
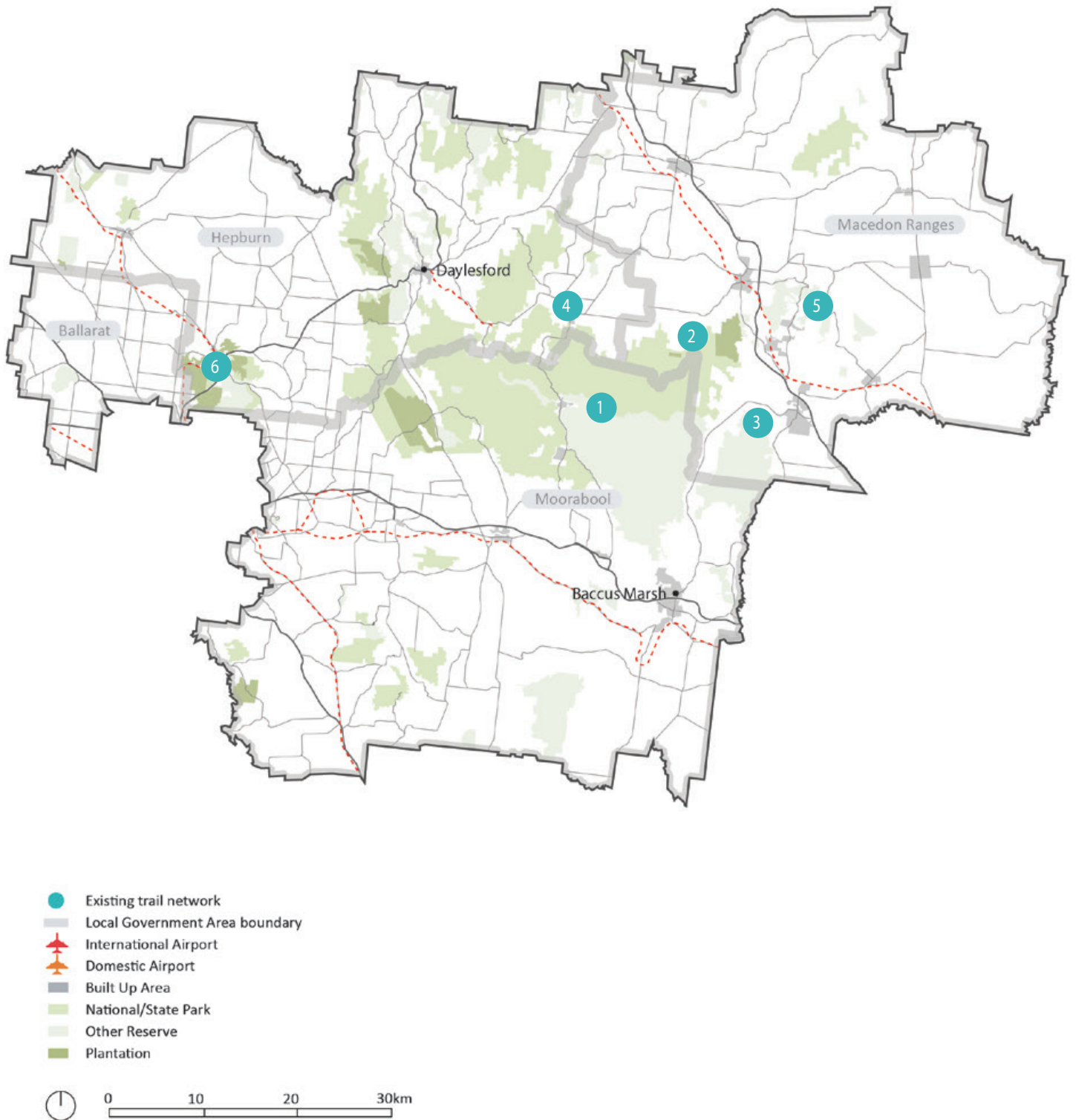
DAYLESFORD AND THE MACEDON RANGES

Figure 27. Daylesford and the Macedon Ranges

Credit: Tourism Victoria

DAYLESFORD AND THE MACEDON RANGES

Located west of Melbourne, Daylesford and the Macedon ranges is the perfect place for a weekend getaway of relaxation. Couples can enjoy mineral springs, day spas, tasty cafes, charming country towns as well as natural landscapes at Trentham Falls, Hanging Rock and Mount Macedon. Families can enjoy art galleries, winter festivals and the giant maze or even take a Llama for a walk at Hanging Rock. There is also the Macedon Ranges wine region and breweries, cideries, and distilleries.

Recommended Scale of Development	Medium
Priority	Medium
Tourism Region	Daylesford and the Macedon Ranges
Local Government Areas	Macedon Ranges Moorabool Hepburn
DELWP Regions	Loddon Mallee, Grampians
Relevant Land Managers	Parks Victoria DELWP Local Government
Mountain Bike Clubs	Gisborne and Surrounds Mountain Bike Club VOGA Cycle Club Wombat MTB Club
Registered Aboriginal Parties	Wadawurrung People – Represented by Wadawurrung Traditional Owners Aboriginal Corporation Dja Dja Wurrung People – Represented by Dja Dja Wurrung Clans Aboriginal Corporation Wurundjeri People – Represented by Wurundjeri Woi Wurrung Cultural Heritage Aboriginal Corporation Taungurung People – Taungurung Land and Waters Aboriginal Corporation
Key Features Parks and Reserves	Lerdederg State Park Macedon Regional Park Steiglitz Historic Park Werribee Gorge State Park

EXISTING TRAILS

ID	Location	Facility Name	Length	Trail Types
1	Lerdederg Gorge/ Blackwood	Blackwood	80	Cross Country, All Mountain,
2	Wombat State Park	Woodend	37	Cross Country, All Mountain, Downhill
3	Hobbs Road	Gisborne	26	Cross Country, All Mountain,
4	Trentham	Trentham	12	Cross Country,
5	Mount Macedon	Mount Macedon	2	Cross Country, All Mountain, Downhill
6	Creswick	Creswick	16	Cross Country,

SCALE

- Daylesford and the Macedon Ranges has a population of approximately 106,000 people and is expected to grow by 37.9% to 134,063 in 2036.

- The Total Domestic Tourism Expenditure was $517 million in 2019 and Total International Overnight Expenditure was $11 million.

- Daylesford and the Macedon Ranges is located between two of Victoria's major regional town centres, Bendigo and Ballarat, and is less than 1.5 hours from Melbourne airport. It is a popular region for day trips and weekends away.

- Providing for scale of opportunity in this region should be done in context and coherence with regional planning in Melbourne, Geelong and the Goldfields regions. Although the region is small in population when compared with these neighbouring areas, Daylesford and the Macedon Ranges may be able to play a key role in catering for demand, especially weekend demand, from neighbouring population centers.

OPPORTUNITY

- This region scored high on opportunity as it is a region with good elevation and terrain potential for high quality mountain bike trails. There are also several existing trail networks in the region, indicating strong desirability of the landscape.

- Mount Macedon was a highly desirable location identified in the Social Pinpoint rider survey. 6 pins were dropped on this location which showed strong rider community interest. Proximity to Melbourne, as well as the elevation were reasons riders identified this location as highly desirable. Further regional and local planning would be required to determine if this location is suitable for mountain bike trail development.

- There are several existing trail networks in the region, some are formalised networks, and others are unsanctioned. There is significant opportunity in the region, and mountain bike specific regional planning would assist with determining regional priorities and maintenance projects as well as new trails projects for the area.

- There is an opportunity for this region to build on the work that is being done on the Creswick Trails Project in designing for accessibility. This region has the opportunity to lead the way in Victoria in terms of providing accessible mountain bike trails, facilities and infrastructure as well as assisting business and accommodation providers with supporting accessible tourism needs.

- The 210km formalised mountain bike touring route the Goldfields Track is also in this region and is a unique offering in the state.

DELIVERABILITY

- There are three mountain bike clubs in the Daylesford and Macedon Ranges region, Gisborne and Surrounds Mountain Bike Club, VOGA Cycle Club, and Wombat MTB Club.

- Moorabool and Hepburn LGAs are captured in the Grampians RDV Region Cycling and Trails Infrastructure Business and Master Plan. Macedon Ranges is captured in the Loddon Mallee Regionally Significant Trails Network, 2010.

- The Creswick Trails Project in Hepburn Shire is a significant trails project currently in progress. Significant local site specific planning has been completed for this project, which has received state government funding.

- This project is being designed in congruence with environmental and cultural values as well as accessibility and inclusivity.

- The Council has also developed a project website to provide clear and transparent communication to all members of the community. All project documents are uploaded to the site, and community have been invited to provide feedback at key stages of the project.

- As a result of the Creswick Trails Project, the Hepburn Shire Council is maturing in their understanding of the Trails Planning process and provide advice to other LGAs on key learnings throughout the process.
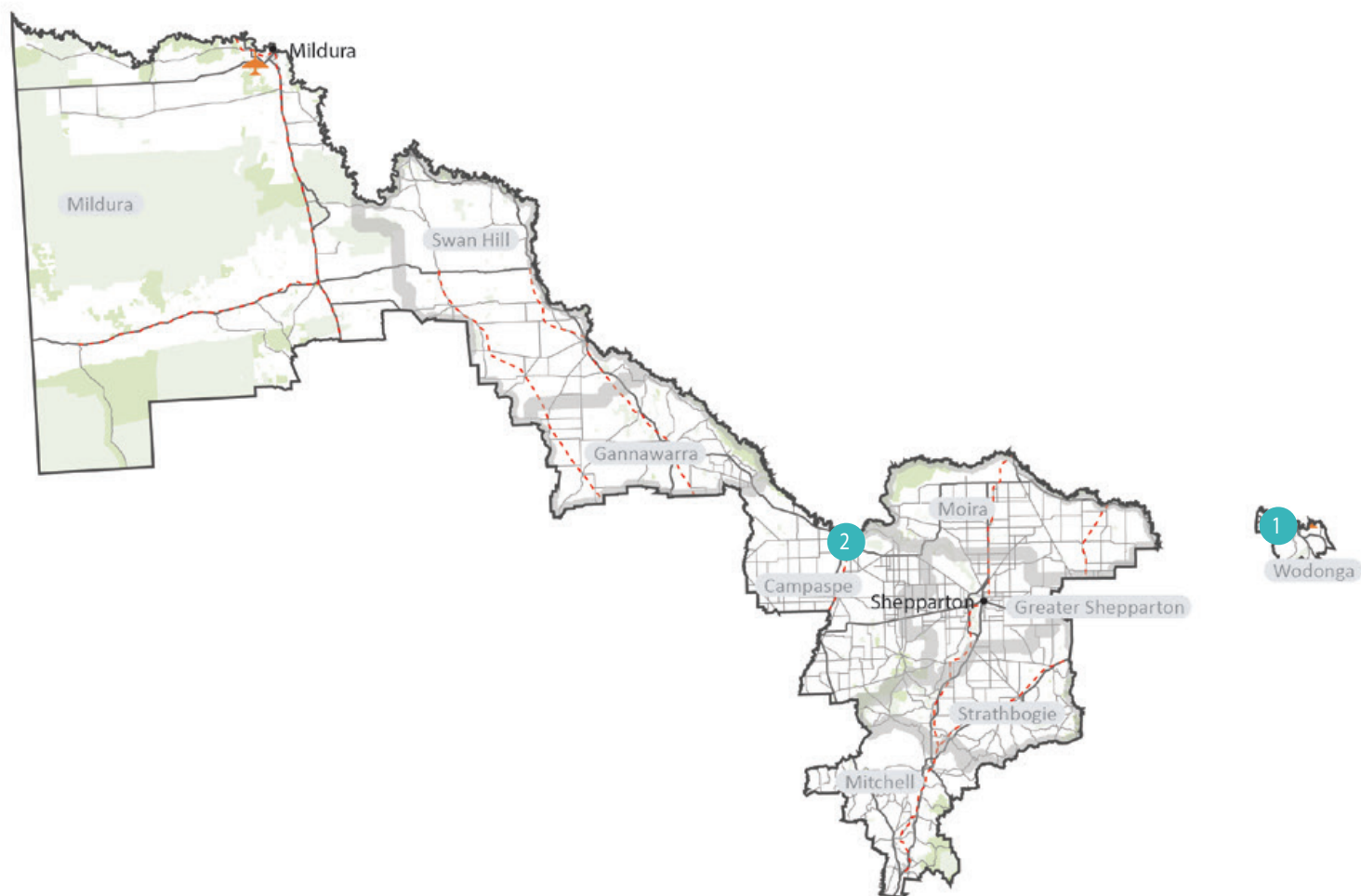
Figure 28. Murray

MURRAY

The Murray region follows the northern border of Victoria and into New South Wales. Centred along the Murray River, this region is known for golfing, boating, fishing, galleries, museums and outdoor art trails. Several significant regional cities and towns are in this region including Mildura, Shepparton, Albury and Wodonga.

Credit: Common Ground Trails

Recommended Scale of Development	High
Priority	Medium
Tourism Region	Murray
Local Government Areas	Mildura, Swan Hill, Gannawarra, Greater Shepparton, Strathbogie, Mitchell, Moira, Campaspe, Wodonga
DELWP Regions	Loddon Mallee, Hume
Relevant Land Managers	Parks Victoria DELWP Local Government
Mountain Bike Clubs	Goulburn Valley MTB Club Coomealla-Mildura Mountainless Mountain Bike Club Echuca Moama Mountain Bike Club Albury Wodonga Mountain Bikers Inc
Registered Aboriginal Parties	First Peoples of the Millewa Mallee, being Latji Latji, Ngintait and Nyeri Nyeri Traditional Owners – Represented by the First People of the Millewa-Mallee Aboriginal Corporation Wotjobaluk Jaadwa, Jadawadjali, Wergaia, and Jupagalk Nations – Represented by the Barengi Gadjin Land Council Aboriginal Corporation Dja Dja Wurrung People – Dja Dja Wurrung Clans Aboriginal Corportation Yorta Yorta People – Represented by Yorta Yorta Nation Aboriginal Corporation Taungurung People – Represented by Taungurung Land and Waters Council Aboriginal Corporation
Key Features Parks and Reserves	Days Mill Historic Area Hattah-Kulkyne National Park Murray-Sunset National Park Terrick Terrick National Park

EXISTING TRAILS

ID	Location	Facility Name	Length	Trail Types
1	Wodonga	Hunchback Hill Mountain Bike Park	21	Cross Country, All Mountain, Downhill
2	Echuca	Banyule Park	9	Cross Country, All Mountain,
3	Shepparton	Mount Major (Dookie Melbourne University)	2	Cross Country, Downhill

SCALE

- The Grampians Region is home to close to 81,000 people.

- By 2036 the Grampians is forecast to decline in population by 7.6% to 75,000 people. The Grampians region is the only region in Victoria forecast to decline in population.

- In 2019 the Total Domestic Tourism Expenditure was $523 million and the Total International Overnight Expenditure $20 million.

- Ararat is one of the most populated and accessible towns in this region (12,000 people), with a regular V-Line rail service from Ballarat. In general, accessibility to this region is lower than other tourism regions in Victoria, as much of the region is not serviced by V-Line trains and there are no significant airports. Horsham and Stawell can be accessed by the Overland train service connecting Melbourne and Adelaide.

- Driving is the predominant way to explore the region and the region is well serviced by major highways. The most direct route from Adelaide to Melbourne passes through this region, however, many holidaymakers opt to drive the coastal route and take in the Great Ocean Road.

OPPORTUNITY

- The Grampians region overall scored low on elevation and ruggedness. However, there is opportunity in this region to provide tailored mountain bike experiences with some key points of difference.

- There are pockets of desirable terrain for mountain bikers in the region including the Grampians (Gariwerd) National Park and Mount Arapiles, with both parks suggested as locations in the Social Pinpoint rider survey. There are significant cultural and environmental heritage values at these sites, which must be considered in any regional and local planning processes.

- In this region there is opportunity to cater for local riders and complement the Grampian's regional tourism offering with unique mountain bike experiences. This is especially because there are currently limited mountain bike trails to the west of the state, several riders noted the limited riding opportunities in the west of the state in the Social Pinpoint rider survey.

- Due to the more subtle terrain, and sparse population, long-distance bikepacking routes could become a point of difference for this region. There is a possibility to link to the Goldfields Track, or the Murray River Adventure Trail (proposed), which are long-distance bikepacking routes in neighbouring tourism regions.

- The Grampians RDV Region Cycling & Trails Infrastructure Business and Masterplan suggests several 'fat biking' mountain bike routes for the Wimmera where the soil is sandy and there is limited elevation.

- Embracing natural features such as the sandy red soils, as well as focusing on the benefits of exploring smaller country towns and expansive 'outback' landscapes could be a key point of difference in this region. Linking trails to existing tourism attractions including the Silo Art Trail will add to the significance of the trail experience.

- The recently announced Ararat Hills project will assist with the current gap in trails to the western side of the state thus catering for local demand and boosting tourism for the Ararat region.

Credit: Tourism Victoria

SCALE

- The Murray Tourism region has 328,650 Victorian residents and is expected to grow by 32% to 410,663 residents by 2036.

- Murray Tourism Region is located either side of the Murray River and straddles the Victoria and New South Wales Border. The eastern portion of this region, containing the LGAs Mitchell, Strathbogie, Greater Shepparton, Moira and Campaspe are the most populated, and most easily accessible parts of the region. This eastern section is well serviced by trains and is along the major driving route from Melbourne to Sydney.

- Mildura with a population of approximately 50,000 is a major population centre to the west of this region and is serviced by a domestic airport and train.

- Additional major population centres in the Murray region are Shepparton, Seymour, and Echuca.

- In 2019 the Total Domestic Tourism Expenditure for Victoria's Murray region was $1572 million.

- Total International Overnight Expenditure in 2019 was $96 million.

OPPORTUNITY

- There was a total of 6 pins placed as potential riding locations in the Social Pinpoint rider survey. These included suggestions of trail networks at Wandong Regional Park, Tallarook State Forest, Rushworth Forest, Lake Warrang along the Goulburn River in Shepparton. There was also a suggestion for a Swan Hill to Lake Boga Trail. Further regional and local planning would be required to determine the feasibility of these suggestions.

- In 2019, the Murray region had the highest regional total domestic tourism expenditure in the state. It is on the major drive route from Melbourne to Sydney.

- The Murray is a popular tourism region for outdoor recreation and sports including boating, golfing and fishing. There is opportunity to develop regionally significant trail network(s) to complement the sport offering in this region. However, the region as a whole has limited elevation, suggesting less opportunity for mountain biking than other regions in the state.

- The priority for this region is the Murray River Adventure Trail. This trail is in development, with $10.3 million committed to the project in the Victorian Budget 2020/2021. The Murray River Adventure Trail will be a multi-sport 1040 km long distance adventure trail following the Murray river and catering to mountain bikes, walking, equestrian and watercraft. It is anticipated this trail will become a popular bikepacking route and adventure.

- 'Murray East' which includes Wodonga, has a popular mountain bike park, Hunchback Hill which underwent a major upgrade in 2020. On the NSW side of the river, there are trails at Deniliquin, close to Echuca, and in Albury at Nail Can Hill.

DELIVERABILITY

- There are four mountain bike clubs in the Murray Region Goulburn Valley MTB Club, Coomealla-Mildura Mountainless Mountain Bike Club, Echuca Moama Mountain Bike Club Inc, and Albury Wodonga Mountain Bikers Inc.

- The Coomealla Mildura Mountainless Bike Club runs monthly cross country races.

- The Murray River Adventure Trail has funding committed and will showcase outdoor adventure tourism in the region and fill an important statewide gap in long distance bikepacking routes. Stage 1 includes the mountain bike trails between Cohuna and Koondrook through the Gunbower Forest.

- Greater Shepparton City Council identified an existing trail network the Dookie MTB Trail (XC and Downhill) on the Melbourne University Dookie Campus at Mount Major. Several users ride weekly, especially on weekends and this has increased during Covid-19 lockdowns. Melbourne University own the land and maintains the facilities. The Council identified that Dookie has through events (past and future) brought a positive economic impact via visitation directly to businesses in Dookie and more broadly to the region. The Council is developing a cycling strategy to cover all cycling disciplines with the intention of working towards promoting the trails and region from a recreational tourism perspective.

- The LGA responses to the questionnaire were generally reflected a positive attitude towards mountain biking with responses were received from Campaspe Shire Council, Gannawarra Shire Council, Greater Shepparton City Council, Mildura Rural City Council, Swan Hill Rural City Council and Wodonga City Council.

- This region is emerging in developing cycling and mountain bike specific plans. Several Tracks and Trails Strategies exist across the LGAs that make up this region, including the:

    - Hume Region Significant Tracks and Trails Strategy 2014 - 2013

    - Loddon Campaspe Regionally Significant Trails Strategy 2018 – 2023

    - Loddon Mallee Regionally Significant Trails Strategy August 2010.

MORNINGTON PENINSULA

Figure 29. Mornington Peninsula

MORNINGTON PENINSULA

Mornington Peninsula is located on the south-eastern outskirts of Metropolitan Melbourne. It is a small peninsula which is well placed for day trips from Melbourne. The area is known for its beaches, hot springs, wineries, local markets, bike tracks, walks and water sports. In recent years the area has been part of a property boom, and cliff-top mansions are dotted along the coastline.

Recommended Scale of Development	High
Priority	Medium
Tourism Region	Mornington Peninsula
Local Government Areas	Mornington Peninsula Frankston
DELWP Regions	Port Phillip
Relevant Land Managers	Parks Victoria DELWP Local Government
Mountain Bike Clubs	Red Hill Riders MTBC
Registered Aboriginal Parties	Bunurong People – Represented by Bunurong Land Council Aboriginal Corporation.
Key Features Parks and Reserves	Arthurs Seat State Park Mornington Peninsula National Park National Water Sports Centre Point Nepean National Park

Credit: Flow Mountain Bike

EXISTING TRAILS

ID	Location	Facility Name	Length	Trail Types
1	Rosebud	Red Hill Mountain Biking Park	27	Cross Country,

SCALE

- Mornington Peninsula is located on the south eastern side of Melbourne. It consists of the LGAs Frankston and Mornington Peninsula shire and is home to approximately 317,000 people. The Mornington Peninsula region is forecast to grow by 21.6% to approximately 366,000 people in 2036.

- In 2019 Total Domestic Tourism Expenditure was $1296 million. Mornington Peninsula had the third highest domestic daytrip expenditure in the state behind Melbourne and the Goldfields.

- Total International Overnight Expenditure for the region was $78 million.

- Mornington Peninsula is highly accessible by public transport and is approximately 1 hour drive from Melbourne CBD, it is in close proximity to Melbourne's domestic and international airports.

OPPORTUNITY

- Two potential locations were suggested by respondents to the Social Pinpoint rider survey, The Pines flora and fauna reserve in Frankston, and Mount Eliza. Further regional and local planning would be required to assess if these locations are suitable for mountain biking.

- The key elevation opportunities and available land on the Peninsula are situated where there is an existing, formalised trail network at Arthurs Seat. There is also a skills park at Red Hill.

- Mornington Peninsula is a popular region for weekend getaways and day trips from Melbourne. Growing this market by promoting the trail network at Red Hill has the potential to add value to the tourism offering of the Peninsula.

- The trail network is unique in Victoria as it is serviced by 'Eagle Skylift' a chairlift where mountain bikes can be taken on the chairlift seven days a week. This is a key point of difference to other networks.

- There is also significant opportunity to provide recreational and fitness benefits to the population along the peninsula with local scale pump tracks, skills parks and jumps parks. This opportunity is currently being explored by the shire with the creation of the Recreational Mountain Bike and BMX Facilities Strategy.

Credit: Eagle Skylift

DELIVERABILITY

- Mornington Peninsula has one mountain biking club the Red Hill Riders. The club has hosted several events, including cross country, gravity enduro events. In 2021, round one of the AusCycling Victorian Schools Mountain Bike Series is planned to be held at Dromana.

- There are several coaching operators in the region offering guided rides, skills courses and school holiday programs and a shuttle operator.

- The Mornington Peninsula Shire is currently preparing a Recreational Mountain Bike and BMX Facilities Strategy.

- According to the Red Hill Riders Website, weekly social rides are held every Sunday, attracting between 30 and 50 riders. The website lists 288 active club members, and 4,285 individual monthly visitors to the network.
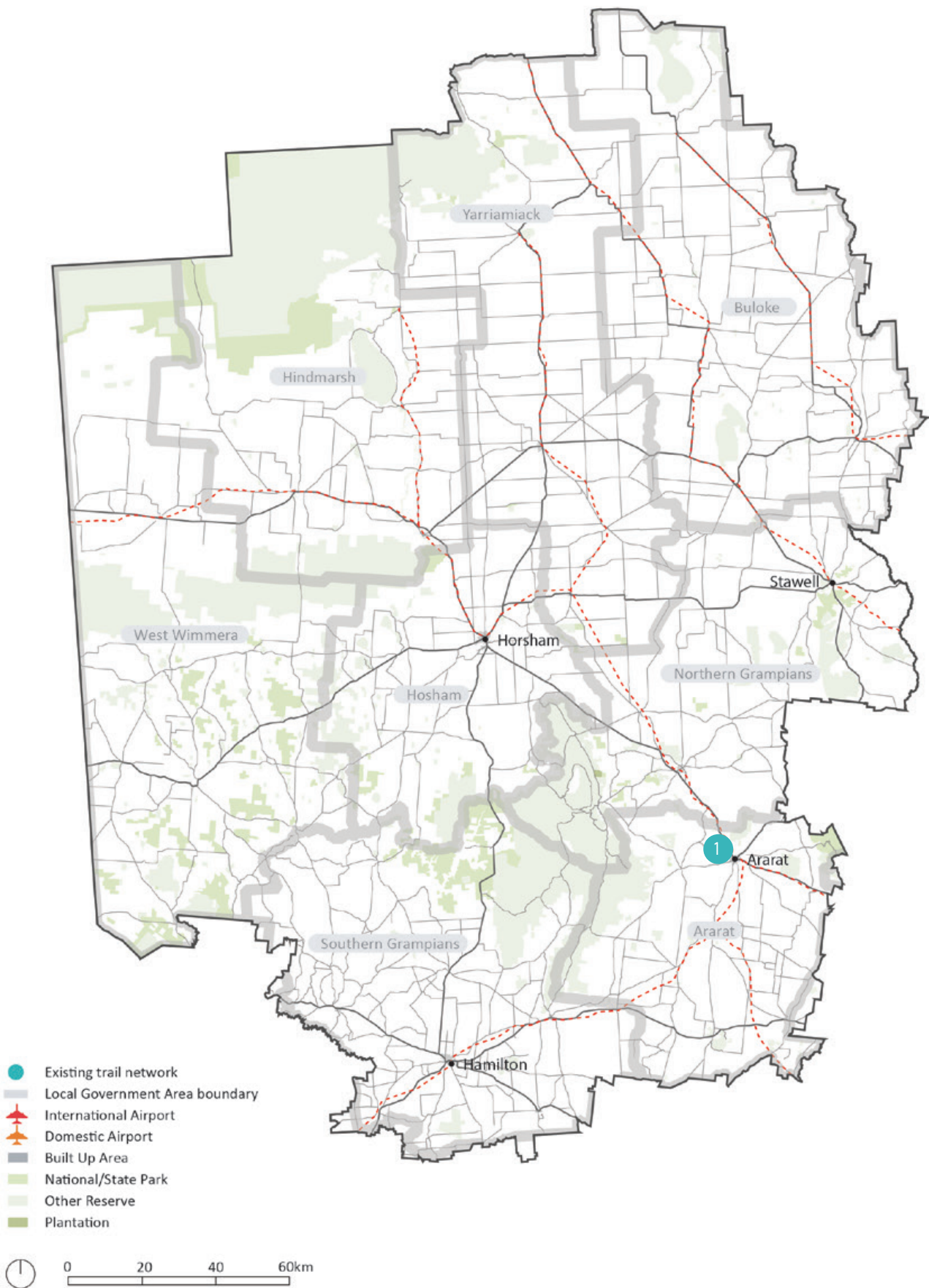
GRAMPIANS

Figure 30. Grampians

GRAMPIANS

The Grampians region is in Victoria's west, home to the iconic Grampians (Gariwerd) National Park, where a new multi-day hike, the Grampians Peaks Trail has recently opened. This expansive landscape has diverse experiences on offer. Visitors to the region can explore Aboriginal heritage sites, learn about the history of gold mining in Ararat, sample farm fresh food and wine, and admire the expert artistry along the Silo art trail.

Credit: Australian Cycling Holidays

Recommended Scale of Development	Low
Priority	Low
Tourism Region	Grampians
Local Government Areas	Ararat Northern Grampians Southern Grampians Horsham West Wimmera Yarriambiack Hindmarsh Buloke
DELWP Regions	Grampians Loddon Mallee Barwon South West
Relevant Land Managers	Parks Victoria DELWP Local Government
Mountain Bike Clubs	Red Hill Riders MTBC
Registered Aboriginal Parties	Wotjobaluk Jaadwa, Jadawadjali, Wergaia, and Jupagalk Nations – Represented by the Barengi Gadjin Land Council Aboriginal Corporation Gunditjmara People – Represented by Gunditj Mirring Traditional Owners Aboriginal Corporation Eastern Maar People – Represented by Eastern Maar Aboriginal Corporation Dja Dja Wurrung People – Dja Dja Wurrung Clans Aboriginal Corporation
Key Features Parks and Reserves	Grampians National Park Little Desert National Park Mount Arapiles-Tooan State Park Wyperfeld National Park

EXISTING TRAILS

ID	Location	Facility Name	Length	Trail Types
1	Ararat	Ararat Hills Mountain Bike Park	19	Cross Country, All Mountain, Downhill

DELIVERABILITY

- There is one mountain biking club in the region Ararat Dirt Riders Mountain Bike Club inc.

- Funding was announced in 2020 through Regional Development Victoria as part of the COVID-19 regional recovery for a $3M regionally significant trails project consisting of 50km of trails for Ararat Hills Regional Park.

- The Grampians RDV Region Cycling & Trails Infrastructure Business and Masterplan highlights mountain biking projects throughout the region. This regional planning, complemented by detailed local planning will assist with identifying which projects to progress towards becoming 'shovel ready'.
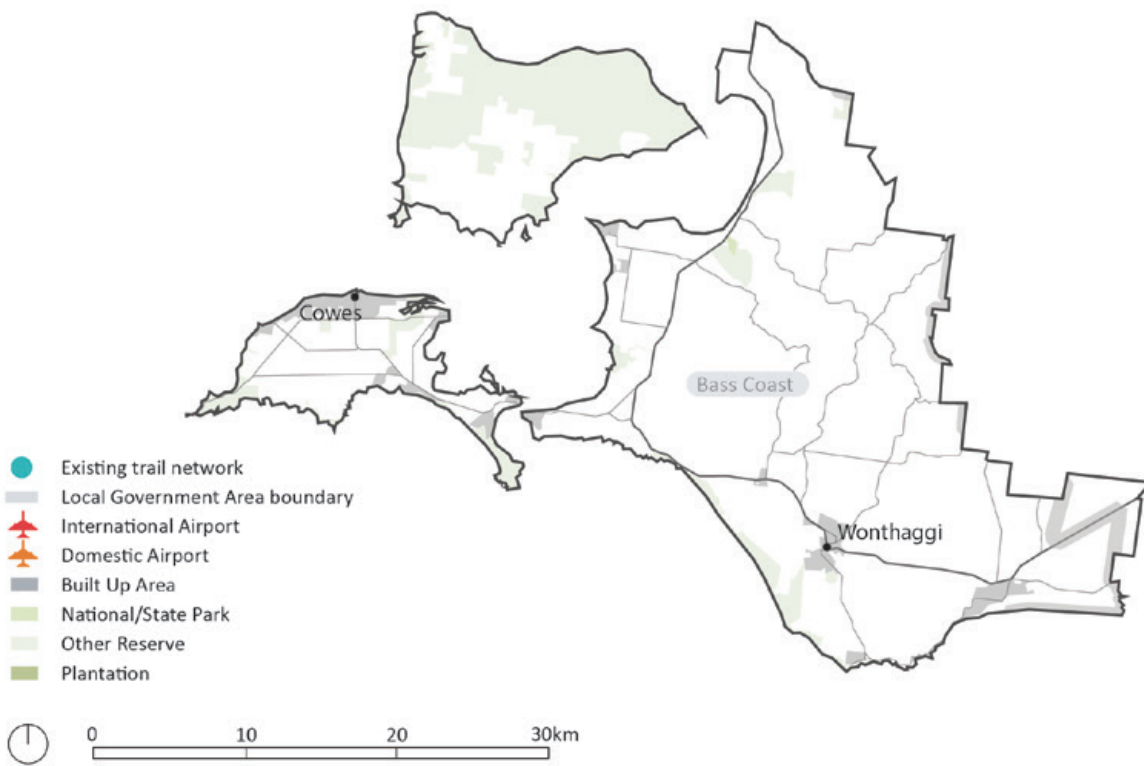
PHILLIP ISLAND

Figure 31. Phillip Island

PHILLIP ISLAND

Phillip island is located 90 minutes drive south-east of Melbourne. Family fun attractions, events and natural assets are a drawcard for the region. Phillip Island is known for its Little Penguin Parade and hosting the Australian Motorcycle Grand Prix. Throughout the year, families and tourists enjoy the beaches, chocolate factory, koala conservation reserve and the optical illusion puzzle world, Amaze'n things.

Credit: Australian Cycling Holidays

EXISTING TRAILS

No known existing MTB Trail networks.

|	
Recommended Scale of Development	Low
Priority	Low
Tourism Region	Phillip Island
Local Government Areas	Bass Coast
DELWP Regions	Gippsland
Relevant Land Managers	Parks Victoria DELWP Local Government
Mountain Bike Clubs	No MTB Clubs (however it is likely that residents would be members of Gippsland MTB Clubs)
Registered Aboriginal Parties	Bunurong People – Bunurong Land Council Aboriginal Corporation
Key Features Parks and Reserves	French Island National Park
Complementary Tourism Offerings	Natural attractions, Commercial

SCALE

- Phillip Island is Victoria's smallest tourism region and is located 2 hours' drive south east of Melbourne. The island is well serviced by a V-Line coach however, there is no rail accessibility or airport.

- Phillip Island is known for its tourism attractions including the Penguin Parade, seal rocks and beaches and is also home of the Australian Motorcycle Grand Prix each year.

- Phillip island has 37,500 people and is forecasted to grow by 43.8% to a population of approximately 48,000 by 2036.

- Total domestic tourism expenditure in 2019 was $553 million.

- Total international overnight expenditure in 2019 was $26 million

OPPORTUNITY

- Phillip Island has a low opportunity score relative to Victoria's other tourism regions.

- The elevation and ruggedness analysis indicates low value throughout the region, as it is a small island with limited land and elevation.

- The region is popular with summer tourists and many of the attractions are focused on family holidays. There is an opportunity to complement the existing sporting offering (surf, skate and BMX) with some smaller local scale developments such as a locally significant trail network, pump tracks and skills parks.

DELIVERABILITY

- There is one commercial outdoor recreation tour operator in the region delivering beginner to intermediate mountain bike tours in the region.

- There are no mountain bike clubs on Phillip Island, however it is likely that residents of Phillip Island would be members of Gippsland mountain biking clubs.

- There is some community support for mountain biking in the Phillip Island region, pump tracks were suggested for this region in the Social Pinpoint rider survey.

- The LGA questionnaire highlighted a recent community proposal for a pump track, however a lack of available land and a full capital works program were raised as reasons this proposal may not be progressed at this time. BMX, skating, and surfing were listed as higher sporting priorities for the region.
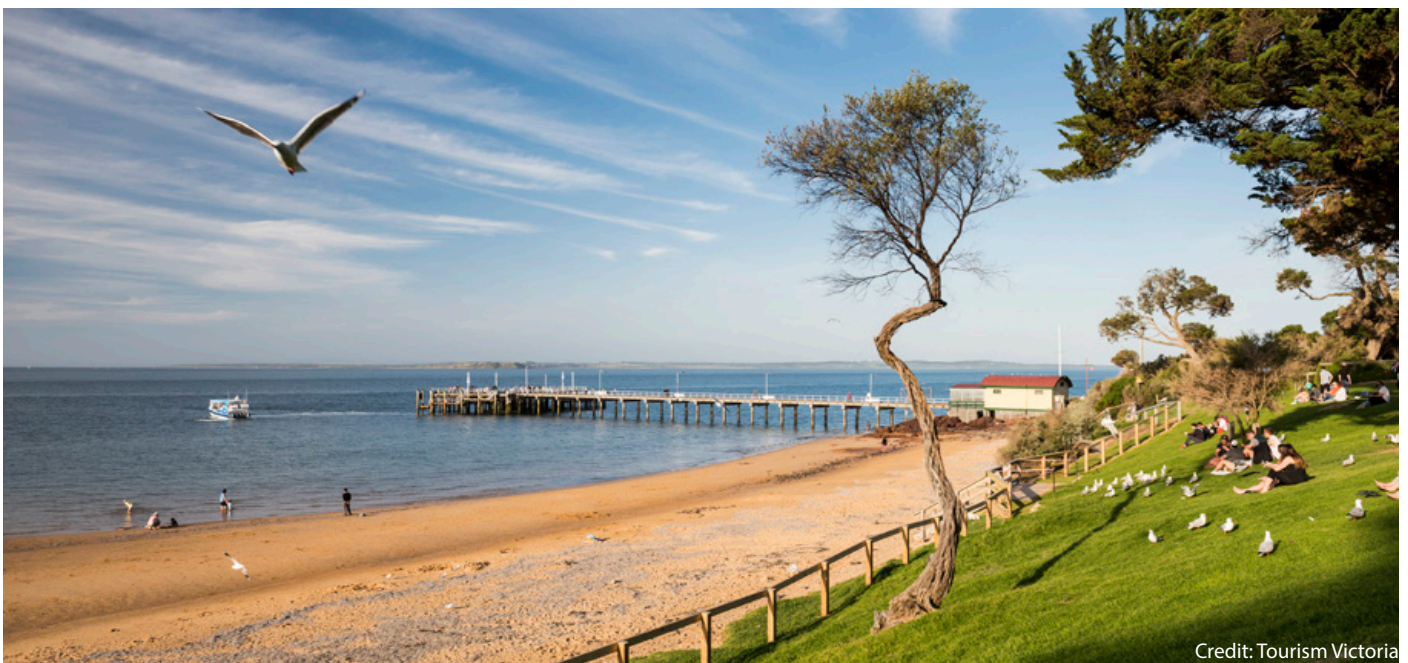
Credit: Tourism Victoria

RECOMMENDATIONS

STATEWIDE RECOMMENDATIONS

This Strategy provides a framework to guide the development and growth of mountain biking in Victoria. Successful delivery of trails and supporting infrastructure will rely on a coordinated and focussed effort by key stakeholders throughout the state. Key to the development of socially, environmentally, and economically sustainable mountain biking, are strategies and actions across governance, planning, trails and infrastructure, participation and tourism and marketing.

PARTICIPATION

Focus	Recommendations
Data	Establish a method of quantifying and collating participation rates in mountain biking, storage of this data and its availability to assist industry to make informed investment decisions.
People from Diverse Backgrounds, Abilities & Demographics	Identify barriers to participation by people from diverse backgrounds and communities with the view to developing and delivering market specific programs providing opportunities for sustained participation in mountain biking. Support AusCycling's Ride Nation program including the national learn to ride program Ride Nation Schools Program, as the national participation pathway framework.
Growth	Review industry developments and survey the riding community regularly to stay abreast of trends influencing participation.
Access	Encourage and support the development of local trail networks and urban bike park facilities providing opportunities for children, youth and the 'time poor' to participate in mountain biking.
Demand	Provide purpose-built trails in strategic locations to service areas with high recreational demand and visitation, with a focus on addressing significant gaps in the market, alleviating pressure on existing facilities and meeting future growth and market trends.
Youth Participation	Build on opportunities provided by AusCycling's Ride Nation Schools program to introduce young people to cycling and more specifically, mountain biking. Leverage the opportunity Ride Nation Schools presents to work alongside participant schools and local government to develop infrastructure such as local trail networks, pump tracks and urban bike parks, accessible for young people and incorporated into the delivery of Ride Nation Schools program.

TOURISM AND MARKETING

Focus	Recommendations
Mountain Bike Destination Information	Develop a central portal for Victoria's authorised mountain bike networks and destinations including information on each trail network, supporting infrastructure and services and value add activities to inform the riding community, tourists, and industry. Develop a statewide marketing campaign to promote Victoria as a mountain bike tourism destination aimed at attracting domestic and international tourists.
Mountain Bike Tourism	Support regions to identify new strategic locations to develop international and national mountain bike destinations and produce suitable for marketing and promotion to target markets.
Branding	Develop distinctive and unique branding to represent a mountain bike trail destination for current and future trail networks to assist with promotion of trail networks, townships and the region that supports these trails.
Imagery	Future Victorian mountain biking marketing campaigns to align with target market and include imagery representatives of the diversity of Australia's population.
International and National Events	Identify existing and potential trail networks and locations capable of hosting national and international mountain bike events. This includes identifying existing locations that could be upgraded or expanded to cater for these events and supporting proposed new trail developments striving to host national and international events in the future.

TRAILS, FACILITIES & INFRASTRUCTURE

Focus	Recommendations
Trail Usage	Record and analyse trail usage data and market visitation for all existing and new mountain bike facilities. Establish a central reporting system to capture this information and make available to stakeholders and the industry.
Trail Information	Conduct an audit of existing trail networks documenting trail quantity, type and classification and available facilities. Establish a central information portal to collate trail information including trail supply across all existing and new trail networks and make available to stakeholders and the industry.
Trail Signage Information	Adopt the Australian Mountain Bike Trail Guidelines recommendations for signage types, including trailhead signage (incorporating trail etiquette), directional signage and trail markers.
Trail Types	Increase the variety of purpose-built mountain bike trails to better align with community needs and demands, ensuring a suitable mix of trail types to cater for relevant markets.
Trail Classification	Improve the diversity of trail types and experiences, including white, green, black, and double black diamond, trails suitable for adaptive mountain bikes, adventure trails, bikepacking and off-road adventure routes to ensure all user types are provided for. New trail networks to adopt the Australian Trail Difficulty Rating System and classify/grade new trails accordingly.
Trail Quantity	Identify and investigate strategic locations across all regions to develop new or upgrade/refresh existing purpose built mountain bike facilities ensuring appropriate supporting infrastructure and facilities exist or can be developed.
Trail Facilities	New trail developments to include the basic facilities and existing trail networks to work towards installing those facilities identified as lacking.
Urban Bike Parks	Diversify places to ride through the provision of localised opportunities in close proximity to urban areas, including pump tracks, jump and skills parks, pocket parks, urban cycling precincts and trail networks of local significance.
Emerging Trends	Identify emerging trends such as eMTB's and investigate how to best to cater to these trends in future trail developments and upgrades to existing networks and in trail maintenance regimes.
Development of Trail Destinations	Identify strategic locations across all regions to develop (or upgrade existing) purpose-built mountain bike trails/facilities and tourism destinations, ensuring appropriate supporting services and infrastructure exists or can be developed.

PLANNING, GOVERNANCE AND MANAGEMENT

Focus	Recommendations
Governance	Develop an internal whole of Victorian Government framework to: • provide a consistent and coordinated government response to mountain biking and mountain bike infrastructure projects • streamline the approvals process in consideration of appropriate legislation and policy.
Governance	Formalise the whole of Victorian Government's Mountain Bike Working Group to ensure key internal agencies are represented and develop terms of reference. Investigate the potential of establishing a state mountain bike advisory group to provide advice to Government and act as a conduit between Government and the mountain bike community. Assign a working group to lead the develop of an implementation and action plan to deliver recommendations outlined in this Strategy.
Funding	Eligibility criteria in relevant federal and state government infrastructure funding programs to align with the trail development process and adequately address the need for: • land manager approval • consideration of planning approval requirements • funding model for ongoing maintenance • trail management model • shovel readiness.
Funding	Investigate, identify and develop innovative funding and maintenance models for mountain bike trails to bridge the funding gap.
Planning	Undertake regional planning to: • ensure a coordinated approach to the planning & delivery of mountain bike infrastructure at a regional level • maximise ability to leverage regional mountain bike opportunities • identify land suitable for mountain bike infrastructure with reference to trail models, trail hierarchy and trail types aimed at addressing gaps in trail provision and future demand.
Planning	Implement the recommended mountain bike infrastructure planning process to ensure: • Appropriate levels of engagement with all relevant government agencies, Traditional Owners, land managers, national peak bodies, the local community, and riders • Early identification of potential project delivery partners and stakeholders • A consistent and coordinated approach to mountain bike infrastructure development.
Legislation	Work with whole of government to develop a statewide public land suitability assessment in consideration of the National Cycling Facilities Plan currently being developed by AusCycling.
Traditional Owners	Strengthen engagement activities and maximise partnership opportunities with Traditional Owners throughout the planning, design, construction, maintenance, management, and delivery of mountain bike facilities.
Partnerships	Develop new and strengthen existing partnerships with key organisations to ensure outcomes of the AusCycling National Cycling Facilities Plan and the Australian Mountain Bike Trail Guidelines including trail significance hierarchy and trail models are implemented.
Trail Management & Maintenance	Identify appropriate management and maintenance models and ensure a sustainable funding model is established for planned mountain bike facilities. Identify alternative funding streams for regular and appropriate maintenance at existing sanctioned trail networks.

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- Victoria's Nature-Based Outdoor Economy , 2016, Outdoors Victoria, SRV
- Victoria's Aboriginal Tourism Development Strategy , 2013 - 2023, Ecotourism Australia
- Victoria's 2020 Tourism Strategy, July 2013, Victorian State Government
- Victorian Visitor Economy Strategy, 2016, Victorian State Government

REGIONAL PLANS

Mountain Bike Specific Regional Plans
- Outer Eastern Region Mountain Bike Strategy, November 2020, TRC,
- Central Gippsland 'G7' Mountain Biking Hub Feasibility Study and Business Case , July 2020, TRC, Destination Gippsland
- Recreational Facilities for Mountain Bike & BMX Strategy, In development, Mornington Peninsula Shire
- Roadside Equestrian and Mountain Bike Trails Strategy, 2014 - 2019, Mornington Peninsula Shire
- Surf Coast Mountain Bike Trail Strategic Plan, In development, World Trail, Surf Coast Shire

Tracks, Trails and Cycling Regional Plans
- Gippsland Tracks and Trails Feasibility Study, September 2019, TRC, Gippsland Local Government Network
- Gippsland Tracks and Trails Feasibility Study (Fact sheet) , 2019, Destination Gippsland
- North East Victoria Cycling Optimisation Masterplan (report summary), June 2018, Tourism North East
- Grampians RDV Region Cycling and Trails Infrastructure Business and Master Plan, September 2018, Urban Enterprise, Wimmera Development Association
- Grampians Region Cycling and Trails Infrastructure Business and Masterplan Local Government Projects, September 2018, Wimmera Development Association
- Visit Grampians Webpage - Cycling the Grampians Way, Accessed 2021, Grampians Tourism
- Western Metropolitan Region Trails Strategic Plan - West Trails , July 2017, SRV, 6 LGAs - (Brimbank, Hobsons Bay, Maribyrnong, Melton, Moonee Valley, Wyndham)
- Northern Regional Trails Strategy, 2016, ARUP, 7 LGAs - (Banyule, Darebin, Hume, Moreland, Nillumbik, Whittlesea and Yarra)
- West Wimmera Tracks and Trails Strategy, November 2018, West Wimmera Shire Council
- Growing Adventure Tourism in the Barwon South West Region - Cycle Tourism Strategy, 2015 - 2020, TRC, Great Ocean Road Regional Tourism Limited, 9 LGAs (Queenscliffe, Colac Otway, Corangamite, Glenelg, Geelong, Southern Grampians, Moyne, Surf Coast, Warrnambool

Tourism and Destination Regional Plans
- Geelong and the Bellarine Tourism Development Plan, 2019 - 2022, Tourism Greater Geelong and the Bellarine, Urban Enterprise
- Towards 2030 Gippsland Destination Management Plan, 2019, TRC, Destination Gippsland, Regional Partnerships Gippsland
- Victoria's High Country Destination Management Plan, 2013 - 2023, Tourism North East
- Grampians Tourism Destination Plan and Investment Roadmap, May 2014, Grampians tourism

Other Regional Plans (supplied in consultation)
- Great South Coast Regional Growth Plan , May 2014, 5 LGAs (Corangamite, Glenelg, Moyne, Southern Grampians, Warrnambool)
- Melbourne East Regional Sport and Recreation Strategy, Regional Development, State Government of Victoria, 7 LGAs (Maroondah, Knox, Yarra Ranges, Monash, Manningham, Whitehorse, Booroondara)

LOCAL TRAILS AND RECREATION PLANS

The following Local level planning documents were reviewed as part of the development of this strategy. The following is a list of documents supplied by Local Government Areas, Mountain Bike Clubs and other stakeholders, or identified during the Literature Review. This is not an exhaustive list of all local plans, trails or relevant strategies that may exist in an LGA or region.

Yarra Valley and the Dandenong Ranges

- Nillumbik Trails Strategy, 2011
- Nillumbik Shire Council Recreation Strategy, 2011 - 2019
- Lake Eildon Masterplan Business Case , May 2020
- Eildon Reserve Precinct Project Improvement Plan, August 2020
- Economic Impact Assessment Lysterfield Park, December 2019
- Officer District Park Master Plan includes MTB Adventure Trail, Accessed 2021
- Warburton Mountain Biking Destination Project Page - Ride Yarra Ranges Website, Accessed 2021
- Cockatoo Pump Track News Articles

Victoria's High Country

- Ride it, Walk it, Indigo, 2021
- Ride it, Walk it, Indigo - Beechworth Chain Gang Submission, 2021
- Walking and Cycling Strategy , 2020 - 2030
- Mitta Valley Mountain Bike Park Development - $1.5 million funding , 2021
- Mitta Valley Mountain Bike Park Masterplan and Trailhead Infrastructure Project , 2020
- Falls Creek Future Trails Map , 2021
- Tender Request Mt Buller Mt Stirling Mountain Bike Trail Network Redevelopment Project – Gravity Trails, 2021

Gippsland

- Baw Baw Epic Adventure Ride - Feasibility Study and Business Case , June 2020
- Baw Baw Cycling Feasibility Study Report , June 2020
- The 'Gippsland Trail' Feasibility Study and Business Case , July 2020
- Omeo Mountain Biking Destination Funding Announcement, Accessed 2021
- Omeo Mountain Bike Destination Business Case , 2019
- Wellington Shire Pump Track Articles

Melbourne

- Manningham Active for Life Recreation Strategy , 2010 - 2025 (reviewed 2019)
- City of Whittlesea Tourism Strategy, 2014 - 2019
- Whittlesea Bicycle Plan , 2016 - 2020
- City of Whittlesea Walking and Cycling Plan , 2021 - 2026 (In development)
- Hobsons Bay Council Cycling Needs Assessment , Future work
- Hobsons Bay Sports Facility Needs Analysis, 2018
- Hobsons Bay Biodiversity Strategy, 2017 - 2022
- Whittlesea Cycle Sports and Skate Strategy, 2015 - 2025
- Wyndham Sports Strategy , 2017 - 2045
- Wyndham Active Transport Strategy, 2020
- Active Wyndham
- City of Whitehorse Recreation Strategy, 2015 - 2024
- Velorome Infield Pump Track Announcement, 2020

Goldfields

- Pyrenees Shire Council Tourism Strategy, 2016 - 2019
- Pyrenees Shire Council Recreation Strategy, 2017 - 2027
- Walk, Cycle Greater Bendigo Strategy, 2019
- Mount Alexander Walking and Cycling Strategy, 2010 - 2020
- Central Goldfields Shire Walking and Cycling Strategy , 2017 - 2026

- Spring Gully Trail Network Master Plan , 2017
- Economic Impact of La Larr Ba Gauwa Mountain Bike Park , 2019
- Guidelines for Event Management at La Larr Ba Gauwa Mountain Bike Park, 2019

Geelong and the Bellarine
- Draft You Yangs Masterplan , In development
- Queenscliffe Bike Park (Proposed) Consultation Summary, July 2020
- Proposed New Bike Park Queenscliffe - Project Website, Last updated March 2021

Great Ocean Road
- Glenelg Tracks and Trails Strategy, June 2020
- Gannawarra Strategic Tourism Plan, 2021 - 2026
- Gannawarra Sport and Recreation Strategy , 2019 - 2029
- Active Warrnambool Strategy , 2019 - 2030
- Corangamite Shire Open Space, Sport and Recreation Strategy, 2014
- Corangamite Shire Trails Management Policy , May 2019
- Revitalising Tower Hill State Game Reserve project page, 2020
- Forrest MTB Strategic Plan, 2015
- Forrest Mountain Bike Trails Economic Cost Benefit Analysis, September 2018
- Forrest Mountain Bike Trails Design Project, 2019
- Anglesea Futures Land Use Framework, October 2018
- Thunder Point Trails Audit Report, 2015

Daylesford and the Macedon Ranges
- Macedon Ranges Sport and Active Recreation , 2018 - 2028
- Creswick Trails Project Page , Accessed 2021

Murray
- Murray Regional Tourism $10.3 million Murray River Adventure Trail Finding Announcement, 17 November 2020
- Benalla Rural City Recreation Strategic Plan, 2015
- Greater Shepparton Economic Development, Tourism and Major Events Strategy, 2017 - 2021
- Greater Shepparton Cycling Strategy, 2013 - 2017 (Under review 2021)
- Swan Hill Active Transport Strategy, 2014 - 2034
- Wangaratta Parklands Masterplan, 2020

Mornington Peninsula
- Mornington Draft Ride Safe Strategy, 2020
- Mornington Peninsula Shire Skate and BMX Strategy, 2008

Grampians
- Funding Announcement for Ararat MTB Trails, June 2020
- Recreation and Leisure Strategic Plan Volume One: The Strategic Plan and Recommendation, 2019
- Recreation and Leisure Strategic Plan Volume Two: Research and Consultation, 2019 - 2029
- Southern Grampians Shire Council Health and Wellbeing Plan, 2017 - 2021
- Southern Grampians Shire Council Cycling and Active Transport Strategy, In development
- Volcanic Trail Masterplan (Self-drive trail), In development
- Open Space Sport and Recreation Strategy , Update Proposed - Will include MTB
- Northern Grampians Draft Economic Development Strategy and Action Plan, 2021 - 2031 In development - likely to include reference to MTB
- Golden Plains Shire Sport and Active Recreation Strategy, 2020 - 2030

APPENDIX 2 MCA FRAMEWORK

SCALE

Criteria	Scoring	Scoring Comments	Weighting and Rationale	
Connectivity - Existing Population	Permanent population within tourism region	2021 Population for Tourism Regions - 1 - (0-40k) 2 - (40-100k) 3 - (200k - 300k) 4 - (300 - 400k) 5 - (1M+)"	4.25	The scale of demand is best indicated by the current population in a particular region.
Connectivity - Future Population (% Change)	Predicted population growth from 2016 to 2036	0 - Population decline 1 - 0 to 20% 2 - 20 to 30% 3 - 30 to 40% 4 - 40 to 50% 5 - 50% +	3.50	The percentage of population growth is an important predictor of future demand. The 3.5 weighting is because regions with smaller populations may experience a higher percentage population growth than regions with a larger population.
Connectivity - Proximity to Airports & Rail networks	Proximity to international or major regional airports. Connectivity with rail network.	Relative score based on rail connectivity (across the region), proximity to international/major airports.	3.50	Connectivity to airports and rail networks indicates the ease of accessibility to trails. However, motivated mountain bike riders are often prepared to drive themselves to a location and travel significant distances to get there if the terrain is amazing, so the weighting is 3.5 to reflect this.
Profile - Existing Tourism Market (Domestic)	Domestic tourism visitation expenditure (from 2019 to account for Covid-19 volatility)	Score based on Domestic Tourism Expenditure (in 2019) ($m)	3.50	Domestic tourism has recently been impacted by Covid-19. Domestic tourism is an important element of the Covid-19 recovery and is expected to recover more quickly than international tourism. These figures represent broader tourism figures, not trails specific tourists hence the weighting of 3.5.
Profile - Existing Tourism Market (International)	International tourism visitation expenditure (to account for Covid-19 volatility)	Score based on International Tourism Expenditure (in 2019) ($m)	1.00	The international tourism industry is currently depleted as a result of Covid-19. The figures are from 2019, and give an indication of what the industry could re-build to, however, it is likely this data is an inaccurate forward projection, so the weighting is low to reflect this. The data also reflects broad tourism expenditure, not trails or mountain bike tourists specifically.
Profile - Alternate Recreation and Activities	Additional activities, tours, festivals, attractions, dining.	Based on attractions and activities in Victorian Tourism destination region. More diversity in attractions scores higher. Nature Tourism scores higher.	3.25	To attract a broader market, and grow interest in mountain biking, combining mountain bike parks with other points of interest will attract new people to the sport and encourage them to try it on holidays. There is also likely to be existing businesses and services in these areas to support tourism. However, If a region has amazing terrain opportunities, alternate recreation and activities may not be required to keep riders interested in the destination, hence the 3.25 weighting.
Desirability	Potential locations (and future projects) have been identified by the community, land managers and other stakeholders.	1 - No / limited potential identified. 2 - Small number of plans identified. 3 - Some locations identified, some plans developing. 4 - Multiple locations identified, planning developing in this space. 5 - Multiple locations identified on social pinpoint AND strong support by landowners or significant planning in place.	3.50	This weighting reflects the level of interest in the region. While it reflects rider interest, it does not reflect landowner support, or other possible complexities. Hence it is weighted 3.5.

Criteria	Scoring	Scoring Comments	Weighting and Rationale	
Established Demand	Existing Users & mountain bike community, Engaged mountain bike businesses and tourism operators (e.g. stores & tours).	One point for each – existing trails, mountain bike clubs, events and mountain bike business / tourism operators, 5 all of the above as well as high visitation at existing trails	3.50	This established demand is an important measure of the surrounding communities ability to support and volunteer maintain trails. There are other governance structures that could be looked at to support trails and grow knowledge, hence the 3.5 weighting.
Existing Trail and Infrastructure Supply	Scale of existing sanctioned trail network.	Lower score for less existing trail, 1 <20km, 2 20km - 100km, 3 100km+	2.50	This criteria captures the amount of existing trail at a point in time, as it can change, it is weighted 2.5.
Governance, Land Manager & Stakeholder Aims and Objectives	Governing body (management, maintenance, funding, marketing), existing mountain bike body, existing overarching trail advisory, understanding of mountain biking by LGA, Tourism, Community Groups & other stakeholders.	1 - no previous experience with mountain biking, 2 - emerging / learning / informal mountain bike discussions, 3 - proficient / good working knowledge & experience / shire trails advisory or similar, 4 - a governance body in place to coordinate mountain biking for the area (multiple LGAs, tourism, land managers, community, other stakeholders)	2.00	This criteria captures the mountain biking governance in a tourism region at a point in time. As it can change, it is weighted 2.00.
Planning Constraints and Sensitivities Land Manager & Stakeholder Aims and Objectives	Level of state, local and private policy and planning support.	1 - no / limited policies / planning identifying mountain biking, 2 - plans identify mountain biking, 3 - mountain biking specific regional strategy or local strategy exists	3.25	This criteria captures the planning that has been done in a tourism region at a point in time. With investment in planning, regions can develop their planning approach over time. It is important, however due to this ability to grow and develop a planning approach, it is weighted 3.25.

OPPORTUNITY

Criteria	Scoring	Scoring Comments	Weighting and Rationale	
Tenure	Scope and scale of state and local government land potentially available for mountain biking.	Relative score based on % of potential land available	4.25	Land availability is a key criteria to determine where trails could be built. The reason this criteria is weighted slightly less than 5, is because the accuracy of this criteria is difficult to determine. In a state-wide assessment, it is difficult to obtain local constraints that may prohibit the use of mountain bikes on a particular piece of land.
Landscape Quality - Landform	Quality of landform relative to landscape characters of Victoria and appropriateness for mountain biking.	More appropriate for mountain biking scored higher, 1 low 5 high	5.00	Landscape is one of the few things that is difficult to change. Attractive elevation, and appropriate areas for mountain bike development are vitally important in mountain bike projects. This is weighted 5.00 as it is essential.
Trail Diversity and Opportunity	Diversity of trail types (cross country, downhill etc) and classifications.	Combined score based on trail difficulty and trail type. Score one point for Green, Blue, Black, Double Black Trails, Score one point for XC, All Mountain, Down Hill, Adaptive - this total score was then converted to a 5 point scale.	2.50	Trail diversity is important, and it would be good to be able to weight this category higher in the MCA. However, the data available in this category is imperfect is not completely reliable as it is from trailforks. This is a crowd sourced platform, and some of the trails accounted for here are unsanctioned.

Criteria	Scoring	Scoring Comments	Weighting and Rationale	
		Relative score based on % of potential land available	4.25	
			5.00	
			2.50	

APPENDIX 3 PROJECT STAKEHOLDER AND COMMUNITY ENGAGEMENT SUMMARY

REQUEST FOR INFORMATION RESPONSES

Region	Responses Received
Yarra Valley and the Dandenong Ranges	Murrindindi Shire Council Nillumbik Shire Council Cardinia Shire Council Yarra Ranges Shire Council
Victoria's High Country	Benalla Rural City Council Towong Shire Council Wangaratta Rural City Council Tourism North East Tourism Board
Gippsland	Baw Baw Shire Council East Gippsland Shire Council South Gippsland Shire Council
Melbourne	Bayside City Council Casey City Council Hobsons Bay City Council Kingston City Council Manningham City Council Maribyrnong City Council Maroondah City Council Melton City Council Moreland City Council Whitehorse City Council Yarra City Council Whittlesea City Council Wyndham City Council Banyule City Council
Goldfields	Greater Bendigo City Council Pyrenees Shire Council Bendigo Regional Tourism Board
Geelong and the Bellarine	Borough of Queenscliffe Geelong Council Geelong and the Bellarine Tourism Board
Great Ocean Road	Colac Otway Shire Council Glenelg Shire Council Moyne Shire Council Surf Coast Shire Council Warrnambool City Council Corangamite Shire Council
Daylesford and the Macedon Ranges	Hepburn Shire Council Macedon Ranges Shire Council Moorabool Shire Council
Murray	Campaspe Shire Council Gannawarra Shire Council Greater Shepparton City Council Mildura Rural City Council Swan Hill Rural City Council Wodonga City Council Mitchell Shire Council
Mornington Peninsula	Mornington Peninsula Shire Council Frankston City Council
Grampians	Ararat Rural City Council Northern Grampians Shire Council Southern Grampians Shire Council West Wimmera Shire Council Yarriambiack Shire Council Grampians Tourism Board
Phillip Island	Bass Coast Shire Council

STAKEHOLDER MEETINGS

Consultation meetings were held virtually with the following stakeholders

- AusCycling
- Victorian National Parks Association
- Department of Jobs, Precincts and Regions
- Sport and Recreation Victoria
- Department of Environment Land Water and Planning
- Parks Victoria
- Outdoors Victoria
- Yarra Ranges Shire Council
- Geelong Council
- Ararat Rural City Council
- Hepburn Shire Council
- Rural City of Mildura
- Lysterfield District Trail Riders

APPENDIX 4 LIST OF VICTORIAN CYCLING CLUBS AND GROUPS CONTACTED

Mountain Bike Clubs

Yarra Valley and Dandenong Ranges

Lysterfield District Trail Riders

Lysty Chicks

Fat Tyre Flyers

Murrindndi Cycle Club Inc

Yarra Ranges Mountain Bikers Inc

High Country

Beechworth Chain Gang

Alpine Cycling Club

Dinner Plain Riders

Team Mount Beauty

Yack Tracks Inc

Mansfield Mount Buller Cycling Club

Gippsland

Gippsland MTB Inc.

Mountain Biking East Gippsland

Prom Coast Mountain Bike Club

Mallacoota P-12 College

Melbourne

Brunswick Cycling Club

Plenty Gorge MTB

St Kilda Cycling Club

Warrandyte Mountain Bike Club

Westside Cycling Club

Sunbury Cycling Club

The Fitzroy Revolution MTB Club

Bicycle Superstore Ladies MTB Social

Daylesford and the Macedon Ranges

Gisborne and Surrounds MTB Club

VOGA Cycle Club

Wombat MTB Club

Geelong Mountain Bike Club

You Yangs Mountain Bike Inc

Goldfields

Bendigo Mountain Bike Club

Castlemaine Rocky Riders

Ballarat/Sebastopol Cycling Club

Club Mud Ballarat

Grampians

Ararat Dirt Riders Mountain Bike Club inc

Great Ocean Road

Surf Coast Mountain Biking Club

Warrnambool Mountain Bike Club Inc

Forrest MTB and Cycling Club Inc.

Mornington Peninsula

Red Hill Riders MTBC

Murray

Goulburn Valley MTB Club

Coomealla-Mildura Mountainless Bike Club

Echuca Moama Mountain Bike Club Inc

Albury Wodonga Mountain Bikers Inc

Wangaratta Cycling Club

Offroad Hand Cycles

ADDITIONAL GROUPS WHO SHARED THE RIDER SURVEY ON SOCIAL MEDIA*

- Adaptive Skiing and Offroad Cycling Victoria
- Australian Mountain Bike Magazine
- Buxton MTB
- Forrest Mountain Bike and Cycling Club
- Plenty Gorge Riders
- We Can Ride - Youth Mountain Bike
- Girt by Dirt
- Melbourne MTB
- MTB Buy, Swap, Sell (Victoria, Aus)
- Cockatoo Mountain Bike Trails
- Ozzie Hardcore Hardtails
- Lysterfield/Red Hill MTB Riders
- The Angry Butcher MTB Group
- Sunbury MTB Trails
- Velo Depot
- Beechworth Chain Gang
- Bendigo MTB Club
- Castlemaine Rocky Riders
- Forrest MTB and Cycling Club
- Gisborne and Surrounds MTB Club
- You Yangs MTB Club
- Women's Bikepacking Australia and NZ Facebook group,
- Mountain Biking Ladies Australia Facebook group.
- Bicycle Super Store Facebook group

* Given the responses received for the survey, this is not likely to be a complete list. There were likely private shares and informal groups who circulated the survey.