



## DAY ONE TAKEOUTS

### John Brown - Break O'Day Council

- New Resident Data: *Did the St Helens MTB Trails influence your decision to purchase?* 31% said YES
- Younger people (20-39 year olds) are moving to the area and overnight stays to the area have increased (2 nights 57%)
- Trails have brought \$20 million of investment to the area

### Glen Jacobs - World Trail - The Perfect Trail Destination

There are 6 items critical for a SUCCESSFUL RIDE DESTINATION

- Connectivity
- Natural feature
- Quality trails
- Pubs and accommodation
- Event overlays
- Progressive expansion

Most popular age groups: 28 to 48 – it is a really large market in mountain biking, both male and female

MTB destinations needs to be 1.5 hours from a major airport and needs more than 85km of trails

### Galeo Saintz - World Trails Network - World Trails Report 2022: What is happening globally in trails?

Trail system challenges and opportunities

- #1 – Funding constraints for maintenance and upkeep
- #2 – Trail degradation
- #3 – Natural disasters and climate change

In 2017 trails were finally recognized as the single most popular adventure travel activity in a global tourism survey compiled by East Carolina University. The research identified hiking as the number one activity undertaken by adventure travellers, with 92.3% of people stating that they had done the activity, while over 51% of those surveyed said that they were planning to go hiking in the future.

Adventure travel is still one of the fastest growing sectors of global tourism that is estimated to be worth \$264 billion per year. Of the top 5 activities, hiking, backpacking and trekking were the top three. And these activities are also the most popular with female travellers. It is important to note that almost all hiking and trekking take place on some form of trail infrastructure. Globally we need to recognise that trails are at the heart of adventure tourism

- Hard to find trail data globally
- 74.2% of respondents do not have a visitor management strategy
- 73.1% do not track the economic impact of the trail to the destination
- Almost 60% of trails do not feel that they have the capacity to maintain the trail itself
- 83.2% of trails do not have a climate change policy in place to manage their trails
- Trail systems challenges and opportunities – Climate change and natural disaster (3), Trail degradation (2) Funding constraints (1)



- Big trends from recent conference – trails supporting environmental regeneration, trails and technology digitalization, increased focus on sustainable trails,
- Need to speak up on the benefits of trail tourism – hand in hand with adventure tourism.
- Connection to a place in a matter that has meaning – Meaning making
- Trails make us more human

### Jen Fry – Wild Bush Luxury - Creating a Journey: Placing track visitors first for first class trail design

- The visitor statement tells the journey from the visitors perspective, and becomes almost the 'why' and decision making paradigm
- Customer Journey Mapping is essentially about breaking moments up into positive touch points
- Chief Experience Officers role is to 'Be your visitors champion.'
- You are not your visitor!

### Clint Wright - Converge Marketing - How to develop a compelling marketing program to attract visitors to your region

Number 1 marketing challenge (of Sustainable Trails Conference delegates)

- How to differentiate the experience, tell our story and the best way to attract visitors/customers
- Budget available for marketing
- Delivering a great experience, infrastructure, maintenance, operators, weather
- Stakeholder collaboration – how to get everyone on the same page and working together

Marketing the key 3:

1. **What makes you different** - Assess your experience against your competitors. What are your strengths?
2. **Know your market** - What are their needs. Tap into existing research. TRA, Roy Morgan, RTO's
3. **Know how to reach them** - Find where they are and develop the right marketing mix to reach them.

### FORUM

- Tips for start-ups – make sure you have done everything right and you are on the right track for making this work properly. Evaluate first. Who is the community you have in place already? Cultivate them from the beginning
- How many destinations can Australia actively maintain, especially as funding for development is high, but maintenance is low
- Importance of trails to connect visitors to nature and culture
- Trails are always an adventure that takes you to new places
- Tips for those who are new to creating trails is to do the evaluation of the location right and be realistic. Just because you have \$10 million to spend don't spend it without solid evaluation
- There is a lack of research on MTB riders that we need to find funding for
- The importance of balancing nature and culture in trails and how to best protect natural assets is about cultivating a direct relationship with the trail by people in order to care for it – the less we experience, the less we care. If we don't experience we lack the feedback loop
- We need to look at innovative ways to find the balance to fund maintenance of trails, e.g merchandising, user pays etc however if we build them properly then the cost of maintenance will reduce



## Nicholas King - Destination Gippsland - The Big M: Smart Specialisation Strategy and a sustainable funding model for trail maintenance

- Increasing investment in tracks and trails infrastructure (bike parks, rail trails and shared pathways)
- Increasing usage of trails by visitors and the local community (especially during the last few years as the tourism, events and visitor economy sectors endured lockdowns)
- Visitors to our region that enjoy trail infrastructure (generally free of charge), require exceptional experiences on well maintained trails.

The Gippsland region - Some quick figures:

- 1,100kms+ of Rail Trails & Shared Pathways (existing and proposed)
- 650kms of the Alpine Walking Track
- 460kms+ of Mountain Bike Trails

Actionable takeaways

- New business models for tracks and trails
- Smart Specialisation Strategy and sustainable funding models for tracks and trails

### Wayfairer Accommodation Platform Pilot December 2021 - September 2022

Aligning stakeholders in a common purpose

Every year in Australia, over \$150m is paid to international accommodation booking platforms, with the vast majority of that money disappearing offshore. We have seen the impact of this model in towns and neighbourhoods across Australia, with the hollowing out of communities and increasing unaffordability of housing.

Wayfairer disrupts this extractive booking model. It's a non-profit platform that enables booking revenue to stay in Australia's communities - creating jobs, catalysing investment, and promoting tourism destinations through sustainable, locally-led initiatives. Wayfairer's approach creates an alignment between stakeholders, where everyone is pulling in the same direction - and that can empower local communities to promote authentic, fair and sustainable tourism.

Building regenerative tourism

Community projects are at the heart of Wayfairer. They are the projects that have been chosen by their communities and must fall within the following three themes. FOOD – PEOPLE – ENVIRONMENT (SUCH AS TRACKS AND TRAILS)

Wayfairer oversees the funding of community projects. It provides an independent mechanism to ensure that funds are being distributed in tune with community expectations and that project selection and impact reporting criteria are being met.

Source: [About Wayfairer](#)

## Greg Milne - City of Hobart - Unsanctioned trails - the challenge of balancing community and agency needs

Unsanctioned trails are not just a Hobart issue, but faced by many – (over 90% of land managers at the conference have to manage unsanctioned trails) how to find the balance – work with trail riders

No perfect formula, might get less of it as we continue to develop the sector in Hobart, but you cannot stop the unsanctioned trail development taking place in some regions.

## Lessons Learned

- ideally, operations follow strategy
- not all improvements can be designed and built from scratch
- compliance is costly and does not work
- local issues will continue to bubble up as new generations grow up
- planning cannot always cater for unknown new event needs
- community involvement is key to sustainable success

## Craig Meinicke - Trail Vision - Best practice trail asset management for sustainable trails

- Management systems are essential for extracting long term value from your trail assets
- Collecting quality data is critical to trail management
- There are many ways to leverage trail data and information to make better decisions, improve user experiences and trail performance

## Craig Young - Somerset Regional Council – The ongoing enhancement of Australia's longest rail trail - Brisbane Valley Rail Trail

### Top 10 Lessons:

1. In-situ machine blending gives the best outcome as far as consistency and speed, but is the most expensive.
2. Understand the existing surface, especially when mixing with insitu gravels.
3. Maintain strong quality assurance with imported materials, mixing and compaction.
4. If blending polymers be careful not to overwork gravel.
5. Communicate, communicate, communicate! Inform users about closures, detours, etc
6. Correct form of trail, it needs to drain.
7. Ensure drainage is considered / designed, especially in areas of high erosion. Be cautious of standard drawings.
8. Greater flexibility in procurement / contract, the better the outcome.
9. Timing. It's a balance between weather, peak times of demand and events.
10. Principal supply item for specialist materials controlled quality and cost.

## Jarred Parsons - Parks Victoria - Grampians Peaks Trail – Building a new long-distance trail

- Over 10 years in planning and construction
- A new 160km (almost 100 miles) hiking experience
- 13-day/12-night hike or do it in sections
- 11 new camp sites
- Officially opened on 12 November 2021.

Challenges – scale and complexity, logistics in remote locations, impacts of the pandemic

Ensuring that the materials used are local – inbuilt resiliency. The footprint and impact of the trail is managed, minimised, and mitigated to ensure that the trail does not impact the environment negatively

## Outcomes

- Over 10,000 visitor nights booked
- 65% hikers are 35+ years old, 56% women
- Over 300 13-day/12-night itineraries booked
- Expecting busy Summer/Autumn season ahead

## Chris Ord – TRC Tourism - The rise of trail running globally

### Demographics

- 36% female and 64% male (2013 survey, Adventure Types)
- Sample event statistic: 51% female and 49% male (Rapid Ascent)
- ITRA: 82% male, 18% Female (reason for difference: competitive context)
- Age 25-54 (89.6%) (2013 survey, Adventure Types)
- Age 35-44 (41.9%) (2013 survey, Adventure Types)

### Know the market - Motivators

- Discover new places (64.5% - ITRA survey)
- Keep in shape (68.5% ITRA survey)
- Connection with nature (56% ITRA survey)
- **Health** – mental as much as physical
- **Nature** – POI driven
- **Community** – sense of connection / belonging (tribal)
- **Competition** – self as much as others

### Know the market - Motivators

58.4% run trail 2-5/week

Cumulative distance per week:

- >100km (4.9%)
- 60-100km (26.6%)
- 31-60km (42.1%)
- <30km (23.4%)

Most common single (training) distance:

- 11-21km (55.4%)
- >21km (13.5%)

Travel to trailhead to train - 87.9% make a journey with express purpose of running trails.

13.2% 'never' run on road

Travel for events / tours

49% travel internationally to run

(2013 survey, Adventure Types)

## Trends

- **Technology** > enabling and (mis) directing access
- **Media** > 'Insta Inspa' - social-driven visual aspiration
- **Experiential** > more a driver than competition
- **Personal challenge** > rise of focus, mental aspect
- **Mega-trends** >
  - COVID
  - government focus on health & wellbeing
  - role of commercial market (rise of brands)
  - backlash effect (technology, time pressures, working day structure/context > move to outdoors)
  - Market turning to aspirational adventure / travel
  - Achievability of trail running –
    - trend for micro adventure
    - low barrier to entry

## Statistics

- All outdoor active recreation stats are rubbery at best
  - >> collection methodology poor
  - >> access to user market inherently problematic
  - >> no data funnels / gateways
- Some stats are good, but indicative and require caveats (i.e. events)
- Anecdotal vs. Statistical
- **Elephant in the room:** we don't have bulletproof stats (trail running but also other non-regulated recreation pursuits *INCLUDING MTB*).
- **TAKE OUT:** observation *can* be a reliable guide if used with common sense and indicative statistics
- **TAKE OUT:** we need to invest in reliable statistics
- **PROBLEM:** knowing where to look to gain understanding

## Statistics we do have

- International Association of Athletics Federations (IAAF) rates trail running as one of the fastest growing sports
- Est. 20 million participants since 2010
- International Trail Running Association represents 1.3 million *members*
- Grown at a rate of 15% / year since mid 90s
- **UTMB** – world's largest event
  - pinnacle of trail worldwide.
  - More than **\$8.5 million generated** from 2017 UTMB.
  - **10,000 runners** capped, **32,000 entry applications**, **111 nations**. Chamonix Tourism Office reports **UTMB busiest weekend of year**
- **UTA** – Australia's largest event
  - 177 runners in 2008 over single distance (100km)
  - **6000 capped entrants**, five distances,
  - plus **estimated 9,000 spectators**
  - Estimated \$12.5 million to local economy

## Events: Indicative Data

Trail Event Statistics Australia 2020-21, *Tour de Trails Survey*

- **119** event producers
- **331** promoted events
- **1160** individual distance runs
- **40%** operators produce 5+ events/year
- **465** average registrations per event
- **154,113** total registrations
- **\$186.50** averaged entry fee
- **\$130,000 - \$4 million**

**\$28.7million** annual spend on entry fees alone - **True total value of trail running to economy is much higher** when you add in expenditure on training, cost of attending events (food, accommodation, travel, equipment, media, nutrition, coaches, relevant subscriptions).

## Case study: MTB vs Trail Running context

### MTB

- supported by government
- MTBA/AusCycling, state associations, sport assoc
- strong formal competitive club culture
- strong public visibility
- strong commercial backing
- strong supply industry organisation
- schools integration

### Trail Running

- no govt support
- no associations (although ITRA emerging)
- no *formal* club structure
- strong social and organic community structure
- low public visibility but rising (*Guardian* example)
- little commercial backing
- no supply industry organisation
- little-no school integration

## Comparative Participation

- MTB largest event: 1000 participants
- Trail Running largest event: 7000+ sold out
- MTB average 'retail' event size: 200
- Trail Run average 'retail' event size: 500
- Number of events MTB: approx. 80-100 all disciplines
- Number of events Trail Running: approx. 330+

## Investment Required

- **MTB:** \$1 million - \$20 million



- **Trail Running:** \$50k-\$100k

**User Behaviour & Spend = Same**

**Why are trail runners an important recreation group for trail (and tourism) managers?**

- Tourism, economy, jobs
- Fosters a value relationship with the environment = stewardship
- Local health & wellbeing
- Community connection
- Low barrier of entry = accessibility
- Low impact usage (enviro + cost to service)
- **Because they are using your resources and infrastructure in increasing numbers**

**Management Considerations**

- **Cited as among biggest barriers to hosting trail runs:**
  - Land manager, permit and permissibility challenges (nominated as biggest challenge)
  - Lack of understanding of and perceived (debatable) risk profile of event as assessed by land managers
- Nominated as **Critical or Very Important** to decision making regarding trail running event location:
  - Quality of landscapes and concentration of points of interest 86%
  - Quality, extent (distances) and connectivity of trails 79%
  - Trail network able to host multiple distances 70%
  - Availability of suitable staging area 70%
  - Supportive land/parks managers 70%
- *Trail Running Events Australia Survey, Tour de Trails 2022*

**How does understanding trail running help you?**

- Deliver better experiences
- Deliver better safety outcomes
- Deliver better ROI
- Grow tourism / visitation = regional \$
- Deliver improved economic, environmental, social, health & wellbeing outcomes
- Rationale for budgets to improve trails
- Deliver better trail master planning and infrastructure
- Deliver better shared use outcomes, manage user conflict
- Assist in land management policy

**Lincoln Quilliam –Trail Ventures - Winston Churchill Fellowship - The key features and benefits of aspirational trail running destinations**

- **Supporting towns & transportation** - *#1 destinations well setup for tourism services at varying price points*
- **Trailhead infrastructure**- *fit for purpose to suit demand*



- **Trail Maintenance** - *Maintenance fit for purpose to suit the impact of demand*
- **Trail running events** - *Community comes together around events – more than any other trail user group*
- **Trail running tours** - *Also significant tourism driver*
- **Key overarching features - Epic trail running destinations**
  - Destination reputation & epic landscapes
  - Awesome trail networks and trailheads
  - Strong and active local trail running community
  - Trail runners are understood and welcomed

## DAY TWO TAKEOUTS

### Kylie Ruwhiu-Karawana - TRC Tourism - Cultural storytelling and trails

- Thread of knowledge (Māori knowledge) to view things in a different way
- Understanding what communities require as part of destination management plans
- Transferring of thread knowledge is so important for bringing people home (it's the most important thing)
- Bringing landscapes to life through telling stories from an indigenous perspective. The land and nature are part of our people and seen as a person and given rights
- Place names have power and there is reason why the place was called
- Trails are in the sky
- Understand what can be and can't be shared in storytelling, understanding the spectrum starts with strong engagement

### Thomas Holden – Traditional Owner - Paluma to Wallaman Falls

- Message stick is the passport granted by elders
- Feel, touch, breath, stop and connect with the country you are on
- Cultural IP has more value than an ecotourism trail
- Australian untapped resource Traditional culture can provide healing
- Song lines = first nations intelligence
- Lore = First Nations Intelligence
- The importance of inverting the consultation pyramid – to put culture and 'lore' at the centre of the proposition!

## DAY THREE TAKEOUTS

### Alli Anderson – TRC Tourism - The multi day walker market and their needs

#### Market size

- Approximately 3.3 million Australians actively walking overnight (been in the past 5 years or have one planned in the next year)

#### Characteristics

- Compared with the average Australian, overnight walkers are **younger**. 57% of walkers are aged between 18-39, compared with 25% of the sample. Participation in walking falls away at around age 40.

#### Compared with the average Australian:

- Overnight walkers are more likely to be born in Australia, but also more likely to speak a second language. 85% of walkers were born in Australia, compared with 77% of non-walkers.
- Overnight walkers are more likely to have graduate or postgraduate qualifications. 60% of walkers have a university qualification, compared with 30% of non-walkers.
- Overnight walkers are more likely to have children. 45% of walkers have children under 18, compared with 14% of non-walkers.
- Overnight walkers are significantly more likely to travel. 94% had been on a holiday in the past year or have one planned for the next year, compared with 67% of non-walkers.

#### Why don't people walk?

People generally cited physical limitations, and a lack of confidence, companions or equipment:

- **Physically incapable**
  - 28% of non-walkers indicated they were physically incapable of overnight or multi day walks.
  - Being physically incapable was the main reason given for not doing multi-day walks, particularly for retirees. People who don't go on holidays are more likely to cite physical limitations as a reason for not walking.
- **Lacking confidence**
  - 20% of non-walkers indicated they lacked the confidence to walk.
  - Young people lacked confidence, people to go with, and equipment.
  - Older families also lacked confidence, and were also starting to become physically incapable.
  - New and young families were very similar. Both gave family commitments, followed by lack of confidence as their main reasons for not walking.
  - Women are more likely to lack the confidence to walk.
- **No-one to walk with & lacking equipment**
  - 16% of non-walkers indicated they had no-one to walk with and lacked the equipment.
  - People aged 31-45 were most concerned about having no one to walk with and a lack of equipment.
- **Too hard**
  - 13% of non-walkers indicated they thought it was too hard to do an overnight or multi day walk.
  - 11% said they dislike walking. Men are more likely to dislike walking.

#### Style of accommodation on track

- Own tent 31%

- Safari tent/cabin/lodge provided with no bedding 19%
- Serviced cabin/lodge (self catering) 24%
- Full accommodation and meals 26%

### Who are they?

- **Generally educated.** Walkers in all categories except those taking their own tent were generally university educated. Interestingly, those using shelter provided had the highest levels of education.
- **Life stage.** Retirees definitely prefer fully serviced walks, and young – mid aged singles/couples with and without children prefer to take their own tent. Older couples and families prefer serviced shelters.
- **Supporting activities.** They like outdoor activities, particularly kayaking and rock climbing.
- Those who like fully serviced walks are more likely to be female, except in the oldest age group. Those who prefer their own tent are about even in the younger groups but skew male as they get older.

### Ideal overnight walk

- Around **a third** of overnight walkers prefer **3 nights or less**
- **60%** of overnight walkers prefer daily **distances of less than 12km**
- Nearly **half** of walkers prefer to walk **4-6 hours per day**
- Nearly **half** of walkers prefer to carry their own food and **cook in provided facilities**
- **40%** prefer to walk with **small groups of family and friends** of less than five people
- Nearly **a third** of walkers prefer their **own tent** to sleep in. **A quarter** prefer full accom. and meals
- **65%** prefer **shared toilets** to be provided along the way.
- **46%** prefer **guiding at accom**, rather than fully guided or no guide.

### Walking preferences

- **\$300 magic maximum.** Unsurprisingly, people with their own tent spend under \$100/night, but 20% of those choosing full accommodation and meals provided also did. The 'sweet spot' for spend tops out at \$300/night.
- **Less than 15km.** Interestingly, those taking their own tent and those seeking fully serviced walks were similar in their preference for shorter walks. Those preferring shelter provided had the highest preference for longer walks.
- **More service = fewer walking hours.** Those carrying their own tent generally preferred longer hours of walking, but fewer kms. Fully serviced walkers had a magic number of around 4-5 hours per day.
- **Walking with others.** People using their own tent tended to be far more interested in walking alone than the other groups. Those using shelter tended to like walking as a couple, and the more serviced styles of walks preferred the larger groups.
- **Amenities.** Composting toilets were a big favourite for those in the more independent modes, but those in the fully serviced walks definitely preferred private bathrooms.

- **Guiding.** Unsurprisingly, those using their own tent have a strong preference for no guiding, and those seeking full meals and accommodation enjoy either fully guided or guiding at accommodation.
- **Frequency.** Generally, walkers went on a walk every year or two, and many less frequently than that.
- **Catering preferences.** People generally prefer to have facilities provided for catering. Unsurprisingly, the full accommodation/meals group prefer fully catered options.
- **Number of nights.** Generally, people prefer walks of around 3 nights or less. With the exception of those who use uncatered shelters, who prefer much longer stays.
- An iconic landscape is very important to those taking their own tent, and storytelling/interpretation is very unimportant. Time spent walking is a factor for all, but less so for those using a provided shelter. Weather/climate is also a factor for people.

## Janet Purdey – NZ Cycle - Cycle Tourism Insights – Understanding the Market

- *Growth of cycle tourism - a silver lining of the pandemic. Seize the moment! Capture the desire for active, meaningful travel experiences.*

### Evaluation - Impact of the Great Rides

- 2.19 million trips (cyclists and pedestrians)
- 10% increase in trail users, 14% increase in cycling users
- 18% increase in visitor nights
- 31% increase in visitor expenditure
- Almost 1,600 businesses service the Great Rides
- Av expenditure per person (main reason for visit) almost \$900, 14% increase
- Health benefit \$11 million – cycle use
- Connecting trail users to the natural environment, value culture and heritage more.

*Visitor expenditure almost 1 billion direct economic benefit to regions*

### % WHO BELIEVE THE GREAT RIDES OF NZ ARE AN IMPORTANT FACTOR IN...

- **91%** attracting visitors to the area
- **47%** attracting people to live in the area
- **8%** attracting people to study in the area
- **62%** attracting people to do business or invest in the area

### What's the opportunity?

- 1.8 million – NZ Cycle Tourism market (0.73 million prospective market)
- 6.9 million – AU Cycle Tourism market (2.6 million prospective market)
- 43% NZ market, 40% AU market – planning a cycle tourism activity in next year
- 58% NZ market, 52% AU market – planning a cycle tourism activity in next 3 years

### What do we know about the current market?

- 7 in 10 aged 18-49
- 41% NZ, 36% AU have some form of disability or impairment

### Ethnicity

- 64% identify NZ European, 81% Australian

#### NZ mainly from cities

- 38% Auckland, 10% Wellington, 15% Canterbury

#### AU – Eastern seaboard

- NSW 30%, Victoria 28%, Queensland 20%

#### Key reasons for taking leisure trips

- Rest and relax (Australian Cycle Tourism Market 62%), (New Zealand Cycle Tourism Market 56%),

#### Key Insights – Opportunities for Future Growth

- **Broaden the Market – Increase the Value**
- **Reach a broader range of users:** younger, people with disabilities, ethnic groups.
- Value increase from engaging a broader range of people in cycle tourism, and engaging cyclists in a broader range of cycle tourism behaviour. Resilience, optimization ie. **cross-selling**)
- **Inclusive tourism** – disability market – both design and comms, and services around trails – massive opportunity.
- **Broaden the Offering:**
- ½ & 1 day trips. Opportunity to grow younger market (time poor) and higher income (time poor) Gateway Drug. Not as lucrative in short term, overtime diversifies market.
- **What's important to the Prospective Market?**
- Nature and scenery drives appeal more than the cycling activity itself. A way of travelling. Combine history, culture, activities with ride.
- **Low Hanging Fruit - Growth Markets**
- E-bikes! Silver dollar - Active over 50s, moderate to high disposable income, time rich
- Hub and Spoke trails work well for these markets
- Australian market – proximity, size, wants comfort
- **Best Prospects for New Trails**
- Urban or trails that include specific attractions, outstanding environment/scenery, fully off-road, low grade, short or short options, well serviced.
- **Life-long legacy**
- **Generational use of cycle trails** – like tramping tracks (families doing tramps, children continue on with their own children). Creating a culture and lifelong love of cycling.

Massive growth in cycling, more opportunities to cycle, ongoing government investment in cycle trail infrastructure, growth in bike sales

Covid impact of people wanting to disconnect from everyday lives and connect with nature, have meaningful experiences

Desire for sustainable, low carbon footprint, hyper local travel

***Maximize the opportunity and enable access to the outdoors for everyone***

#### Ashley Ruston – Parks TAS - Putting the visitor first – the lessons learnt from Tasmania

Three Capes track

- Australia's Premier Coastal Walk
- Wild Edgy but Safe
- Dry Shoe & Achievable Walk

- Sleep in a Comfortable Space
- Pack Light
- First Time Walker 28%
- As a Small Group 28%
- Return Walkers 30%
- Baby Boomer 51% over 50 yrs
- Interstate 81% International 6%
- Professional 47%
- 83% primary reason to visit to Tas
- Best Thing Ever in My Life 33%
- Amongst the best things ever 62%
- “All Seasons All Times”

### Rod Annear - Department of Biodiversity, Conservation and Attractions WA - Don't Smash the Egg

- Planning needs patience
- Speaking with the right people at the right place at the right time
- Be persistent and consistent
- Take risks,
- Try, fail and go again
- Have fun

### Gerard McHugh - World Trail - Estimating Trail Impact Widths and Vegetation Removal

- Providing much needed data from 800+ sample points across similar tracks in Australia to evaluate the trail width and vegetation loss in track construction.
- Provided an evidence-based mapping solution to show trail width and vegetation loss by grade.
- Can inform environmental effects statements moving forward.
- Average 2.3m.

### Matt Harrington - Yarra Ranges Council - Navigating the legal environment for trail construction

- Evidence kills hesitation
- Start small – prove your case. Demonstrate return on investment
- 20 day assessment process took 5 ½ months
- Data is important but political will is equally important



## Cormac McCarthy - Manningham City Council - Show me the way: a guide to effective trail signage and maps

- Signage – good the bad and the ugly...
- Brand aligned and beautiful signs
- Not north facing if you can
- Graffiti resistant is critical
- Cultural connections
- Awesome maps - 'yack tracks'

## Chris Halstead - TRC Tourism - Best practice in trail auditing and how to plan your maintenance program

- Audit and Maintenance – need to have trail goals – where do you want to get to, how will you do that and what will be the expected challenges on that journey? Different systems of trail management create inconsistencies across projects, regions. Construction and standards need to centre on the user and consider comfort as much as risk. Trail maintenance and construction needs a plan and a management plan in particular, should come out of recommendations. Delivering realistic trail maintenance needs intricate planning. Important to consider legacy trails, and community around trails when looking at construction
- Need to consider design specifically with a view to low maintenance solutions as budgets and staffing are the biggest issues. Need to recognise real environmental, economic, social VALUE. Needs to be measured or observed and recorded. Kokoda Track is a prime example – choice of tourism and the trail as more valuable than mining or other industry. Trail tourism delivers them better economic and social outcomes and environmental than mining.
- Considerations of traditional owner perspectives and wishes on impact, routing and style of trail form. Consider safety and monitoring systems of the trail and trail users in suit. What is risk management plan of the trail - infrastructure and users.
- Engage local community as stewards of trail. Succession planning is important – should be part of trail maintenance plan and recording and passing on of information..
- Significant costs in environmental planning and offsets pre build. Plan for them, plan for them impacting the design and build.
- Volunteers and stewardship is an important part of the trail management but don't rely on volunteers too much – require professional, funded maintenance crews, with volunteers integrated into that.

## Hamish McCallum-Smith - World Trail - Determining Idealised Descending Berm Dimensions

- There are a lot of other recreation fields that have existing details design standards – BMX, hiking, ski... doesn't really exist in MTB.
- Engineering standards can deliver better experiences, safety, sustainability, lower maintenance costs etc – but needs more thought, research implementation in MTB.
- Hamish's research investigated variables in berms and rider interaction – rider speed etc.



- 2 month study in Derby found that ... there were significant consistent relationships within data collected - meaning the study has validity in terms of some form of standardising berm design and build.
- Were limitations of research – more trails different designers, more sample size, untested method, subjectivity.
- Once expanded, solidified, this will be an important tool for new trail builders.
- Research sets a baseline, but needs extending, but also proves engineering can be used to set and achieve better standards.

### **Phil Saxena - Velo Solutions - Pump track best practice**

- Pump track has established standards and best practice in place.
- Pump track – came in 15 years ago or so. Initially grassroots user built.
- Pump tracks deliver an enjoyably facility for all users no matter user skill.
- Move to asphalt from original dirt > solving sustainability, maintenance, experience issues. Asphalt is now go to for any pump track surface. Pump tracks being requested worldwide.
- Now better coordination with councils for better positioning, location. More integrated into strategic planning – location, and number of tracks (cluster). Idea of a trail network, connected pump tracks, but in urban and peri urban areas. Multi use – skateboards, scooters, MTB – design can be slanted to one or other or multi.
- Pump Track riding is now UCI, has world champs, and racing events – youngest and fastest developing cycling sports (15 years). In AU – rapid growth in demand. Tracks benefiting from UK mistakes in development phase.
- Asphalt mix – different to car use so don't need road style mix. Super smooth, rolls fast, least resistance to wheels. Mix that also allows for good shaping.
- Tenders – still learning what is needed for good pump track, Currently revert to road level standards, rather than specific to job. 40mm is not enough to get density for compaction, or get shapes.
- Track design is getting more advanced and complex (rider interest) but needs considering for risk (crossover). Innovation still happening such as floodlights (extended riding hours)
- Social considerations and innovative solutions – lower social economic areas – on site bike supply, helmet supply by NGOs for equitable access etc. Creates community connection and pathways. Trails as social interactions for community benefit – feed zones etc
- What next in pump tracks: continued growth, leveraging opportunities such as social and inclusion and community. Standards important to this. Every town should have a pump track...

### **Craig Meinicke - Blue Sky Trails - Building trails with progression in mind**

- Master planning is critical to a network that fosters rider progression
- Pathways from green to blue to black
- Zones compared and in preference of stacked loops
- End to end zoned experience – not green into blue with no continuation end to end of green



- Choke points to ensure riders remain where should be
- Skills parks important. Contain risk. Provide instruction. Controlled environment.
- Reworking existing trails or realignment – only if existing is suitable and sustainable. Good outcome from permitting perspective.
- Multiple lines across same features (multi-user level on single trail needed careful design but possible)
- Careful about how big the step ups are – too much progression too quickly?
- Education and training in skills progression important. This is also pushing the skills of younger riders higher, quicker. Demand in stream for more challenging stuff.

### **Geoff Gabites - Cycle Journeys - Where's the Money? - Operator Levies, Donations, Social Licence and the Tyranny of Size**

- Annual Trail revenue represents 4% of NZ Domestic Tourism.
- Is this being reflected in Marketing and Promotion?
- Who should push our case to Government for increased funding beyond our existing \$8m pa?
- Trails are about more than Tourism.
- Update our constitution to enable us to include more than just Trails.
- Failure to engage with Operators creates a huge disconnect and a communications breakdown.
- How do we get the accommodation providers included. This sector represents 40% of our trail revenue.

### **Kirsten Seeto - Alpine Community Plantation - Mystic Park, Bright, Victoria**

- Mystic Park has become one of the most popular mountain biking destinations in Australia.
- Hand built by the local community - for the community - the park consists of over 50km of trails to suit all abilities from those new to the sport, through to expert riders.
- Mystic Park attracts around 58,000 visitors to the Alpine Shire each year, contributing to approximately \$27.1 million into the local economy, 227 local jobs and an economic output of \$66.1 million.
- Mountain biking is now one of the fastest growing recreational activities globally, with Australia recording an increase in participation by more than 60% in the last five years.
- Victoria's High Country has been identified as a high priority in being able to address critical gaps and cater for the growing demand for mountain biking.
- Bright has also been highlighted as one of the top 3 mountain bike destinations or family mountain bike holidays in Victoria.

### **Key Messages**

- Expectation that MTB Parks should be a public service
- Lots of threats to move vacations to towns that have free MTB facilities
- Users have no idea the amount of resources a safe and well-managed park consumes
- Most people who private shuttle do not realise the cost they absorb (fuel, maintenance, driver etc)



### Learnings so far

- Get your local council and chamber of commerce onboard and be sure everyone understands the financial impact of the park to the local economy
- Bring your local MTB Club onboard
- Change is extremely difficult to implement unless closure is a possible consequence of inaction
- Direct feedback from significant operational changes to a survey to collate and understand community sentiment

### Lincoln Quilliam - Trail Ventures – kunanyi Mountain Run – community supported trail maintenance model

- Roads are maintained to demand, why not trails?
- Should it be that hard for community partners to obtain permits to help parks authorities with their maintenance?
- Most suitable funding sources?
- Relationships with land managers, or outcomes for community?
- Trail maintenance is required - with or without kMR

### Alan Gould - Trail Vision / Jo Larkin - TRC Trails - Trail Vision – technical application of the platform

- TrailVision app and software standardises methodology of managing lifecycle of trails and the maintenance programming required to keep them at user and sustainability expectation. Powerful tool in terms of monitoring and assessing maintenance requirements of a trail, which feeds in to planning.
- Ease of user process is important for technology aimed at field work – intuitive design / useability is a must.
- Multiple input times i.e. Field officers input then estimators add data later on

### Chris Hunt - HD Surveys- Applications of LiDAR and Photogrammetry technology for trails

Lidar application to trail building.

- Restricted by launch site and visual line of sight for drone – CASA restrictions
- Battery life of drone – need flight plan and know you can get enough data worthy
- Needs to be used in right place
- Hard to travel interstate (courier battery)
- PRO: create terrain model, contours, and routes designed off data
- Birds eye view of contours can pinpoint mathematically where route can go according to grade
- Classify features
- Good for hard to access areas initial survey - difficult landscapes, early on in survey
- Tree counts and foliage cover assessments
- Safer re not putting humans in to potentially risky situations
- Less time on site

## Simon Allen - CSIRO - It's not the size of your instrument(s), but how you use it(them).

- Issues with data accuracy can severely affect experience
- Lots of online platforms and software offering various levels of data, useability, usefulness, and can be confusing as to which to use, when and why. Plethora of 'part solutions' in terms of online 'tools' for trail users and managers. None seem to match / deliver for all users, all uses.
- User experience and intuition of navigating within the app (what does what function) is important
- Base data being comprehensive and consistent is critical. Lack of data represented on the ground in situ means loss of trust by user in app / technology.
- Need to understand all the intricacies of how someone uses tech on the ground, why, when etc in order to build correct data set and user experience.
- Issue of data access – common data, quality gate keeper of data? User supplied or authority supplied. Who owns data can affect access to data – free or commercial subscribe?
- Monitoring of trail user behaviour as a tool for land managers – heat maps and record of trips, showing where people actually go in landscapes, how they are using assets, rather than how we think they are (i.e. informal trail use vs formal). Can help management understand user behaviour and make better management decisions.
- Technology has obvious use in user safety and monitoring in field.
- In field reliance on reception or sat connectivity

## Henry Talbot – Capra - Innovation in digital platforms

- Capra - accurate route maps combined with pinpoint route specific pins of info you should know along the way.
- The challenge: creating great maps that people find easy to use is hard
- Capra Collections are an easy way to tackle specific parks and regions in a systematic way... using curated information
- 85% of leisure travellers decide on activities only AFTER having arrived at the destination
- The next 5 years... accurate information will be key