



# Maximising the value of Mountain Biking Tourism to the Tasmanian Economy

Report | October 2025

**episteme**  
*informed strategy*

## ACKNOWLEDGEMENTS

We acknowledge the palawa/pakana people who continue to care for this country today. We pay our respects to their elders, past and present. We honour their stories, songs, art, and culture, and their aspirations for the future of their people and these lands.

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Header image: West Coast ebiking. Credit Revolution MTB

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## ABOUT THE AUTHORS



**Dr Allison Anderson** is a specialist in tourism planning and market research, and an advocate for building community benefit from tourism.

Allison has a special interest in mountain biking – with a passion for the green trails and a keen interest in the benefits MTB affords places that embrace it. As head of Research & Insights at Tourism Tasmania, Allison led the unordinary adventures research and profiling of MTB visitors to Tasmania. Working as a consultant, Allison has delivered market assessments and analyses for MTB in

North Queensland, Queenstown NZ and Kyogle in NSW. She also coauthored the MTB strategy for Tropical North Queensland in 2015.

Allison's PhD is in urban design and tourism, where she examined the delivery of tourism experiences at a destination level. She has worked as a Strategic Planner and academic, conducted social impact assessments, developed business plans and advised businesses on post-disaster recovery. She is currently Chair of the Northern Tasmania Development Corporation and a Ministerially appointed member of Tasmania's statutory Parks and Wildlife Advisory Council. She is an adjunct to the University of Tasmania and a Tasmanian Tourism Awards Judge.

Allison's practice is on the lands of the Mumirimina people.



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Tim graduated from the University of Tasmania with first-class honours in economics, after completing a double degree of economics and business, where he was admitted to the Dean's honour roll, and was awarded valedictorian for his work in the economics field. More recently, Tim was awarded as an ABC Trailblazer for 2025 in recognition of his work re-establishing and successfully running the "Winter Challenge Tas" multisport event, which has a strong mountain biking and regional community engagement theme. This award led to Tim presenting on his event in Canberra's Parliament House in February.



**Emily Mahler** is a technician with over 20 years of professional experience in economic analysis and modelling, specialising in the visitor and leisure economy. Her expertise lie in granular data analytics and complex economic model development to support major investment and strategic decision making across industry and government.

Emily has delivered a diverse body of research and analysis, underpinned by deep insight into visitor markets, regional economies, and an outstanding analytical and technical capability. This includes the design and development of econometric demand forecasting models, the construction of purpose-built policy and investment analysis models, and undertaking of complex product, industry and regional level economic impact assessments. Emily's work is characterised by frameworks and advisory services designed to deliver sustainable solutions, considering not only the financial cashflows but encapsulating the broader economic, social, cultural and environmental implications.

Recent economic assessments include a report for the South Australian Tourism Commission demonstrating the economic and social impact of the 2024 Tour Down Under, and a business survey and dashboard development for the East Gippsland Shire Council to demonstrate strategic investment opportunities facilitated by the growth of MTB tourism in Omeo District and surrounds.

Emily's practice is on the lands of the Awabakal people.

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## Executive Summary

Investment in MTB tourism is an investment in Tasmania's regions. Currently, MTB tourism is worth \$61 million per year to the Tasmanian economy and supports 590 jobs, many of which are based in regional areas with limited other opportunities for employment.

MTB visitors spend 26% more than regular holiday visitors to Tasmania,<sup>1</sup> and evidence from other MTB destinations suggests that there is considerably more market demand than is currently mobilising to the state.<sup>2</sup> Effective and targeted investment to grow MTB tourism is also an investment in the delivery of Tasmania's State Visitor Economy Strategy; this report shows that growing MTB tourism increases the contribution visitors make to Tasmania and maximises benefit to regional communities. It differentiates and builds awareness of Tasmania to attract MTB visitors who grow value over volume, and it is instrumental in increasing liveability, which supports the attraction of a skilled workforce. A recent survey in Break O' Day Council found that around 25% of people moving to the area were influenced in their decision by the MTB trail network.<sup>3</sup>

Projections derived in this research suggest that with targeted and effective investment, visitor contribution could grow to more than \$200m per annum in spend over the next decade. Currently, Tasmania is facing steep competition from well-funded and resourced MTB destinations particularly in NSW, Victoria and New Zealand, which have significant investment in infrastructure, marketing and hold a novelty value for riders.

Perspectives from riders, industry operators, stakeholders and trail managers indicate the ultimate importance of maintaining the existing trail network to a high standard and the desire for a range of trails. Riders highlight the importance of Tasmania's natural wilderness and environment, and the variety of high quality terrain that comes with it. Nearly half of riders in this research indicated that the vibe of the town is important to them. This was supported by several operators who also commented on the need for infrastructure supporting the vibe of a town. Further down the list, but still considered important, is the access to supporting experiences, such as shuttle buses and visitor experiences including food and beverage, accommodation and activities.

To realise Tasmania's MTB potential, investment must be targeted and well informed. Investment needs to start with maximising our existing assets through building new trails and supporting infrastructure in iconic networks, providing gold standard maintenance, improving MTB marketing for the state, and attracting international events. This needs to be supported by improving access, growing the adventure tourism industry and attracting private investment, ensuring Tasmania's premium product is sustained. International comparisons highlight that leading MTB destinations succeed by leveraging natural assets, diversifying tourism offerings, and strengthening supporting infrastructure and marketing.

For Tasmania, the lesson is clear: MTB tourism should be developed as part of a broader, connected adventure tourism industry, underpinned by strategic investment that maximises economic returns and reinforces the state's position as a world-class destination.

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<sup>1</sup> TVS YE March 2025

<sup>2</sup> Anderson (2021)

<sup>3</sup> Break O' Day Council (2025)

This report makes the following recommendations, which align with the Mountain Biking Action Plan 2024:

## Defend: Make the most of what we have

The foundations of Tasmania's MTB product are strong, however maintaining our lead in the MTB tourism market is far from assured. The following priorities recommend work to enhance Tasmania's existing MTB assets to maximise value for visitors, the state, industry and regional communities. The recommendations are listed in priority order, however the key actions below them are identified for delivery as opportunity arises and not necessarily in priority order.

### 1. Programmatic expansion and enhancement of the existing ride experience

- 1.1. **Expand existing iconic trail networks** to maintain rider engagement including new trail features.
- 1.2. **Develop trailheads**, including more accessible rider information and services.
- 1.3. **Explore uplift options**, including examining cableway concepts and other sustainable options such as electric vehicles
- 1.4. **Build physical information hubs** that are centrally located and accessible to guide first-time visitors on services, trail options, and essential amenities.
- 1.5. **Support ongoing research and development** on rider comfort improvements and innovations including water stations at key points throughout networks.
- 1.6. **Develop e-bike specific infrastructure** throughout significant trail networks, including charging stations and tailored signage, to support and encourage this fast-growing rider segment. New, direct e-bike centric climbing trails will also help keep riders off dangerous shuttle roads.
- 1.7. **Develop more iconic single/multi-day wilderness mountain biking experiences**. Invest in a long-distance, point-to-point wilderness trail that showcases Tasmania's iconic wilderness character. "Tasmania's equivalent to New Zealand's Old Ghost Road". Include purpose-built huts designed for mountain bikers and explore options for e-bike charging infrastructure to cater to the growing e-bike market.

### 2. Consistent budgetary support for iconic trail network maintenance and innovation

- 2.1. **Develop a state government trail maintenance and innovation fund** to create and maintain high-value infrastructure with dedicated and consistent funding for trail networks on a per km basis to ensure the riding experience remains premium and brand aligned.
- 2.2. **Ensure that trail maintenance funding is included** in the planning and costing of new MTB developments.

### 3. Engage with Tourism Tasmania and other strategic partners to better promote Tasmanian MTB

- 3.1. **Facilitate collaborative marketing efforts with Tourism Tasmania** and other adventure-based tourism operators, accommodation and food and beverage operators in line with the increasingly adventure focused Tasmania brand.
- 3.2. Working with Regional Tourism Organisations, **launch an ongoing industry education program** to connect with Tasmanian tourism operators and information providers on MTB signature & non-signature offerings.
- 3.3. Work with Tourism Tasmania to **update the Unordinary Adventures collateral** and deliver Off Season strategies for MTB options in winter months.

- 3.4. Spread the love through **identifying lesser-used high-quality trails** to reduce pressure on signature trails through marketing partnerships with MTB-N members and influencers.
- 3.5. **Build a landing page for the curious mountain biker.** This could be developed to link to the Discover Tasmania website to channel people into broader adventure tourism holidays as well.
- 3.6. **Bring awareness to Tasmania's rail trail offerings.** With strong existing rail trail offerings (specifically N.E rail trail and Railton – Sheffield rail trail), this market remains largely untapped in Tasmania. Develop strategies to bring awareness of these rail trails to a growing and high-yielding interstate & international rail trail rider market, coupled with some supporting infrastructure to streamline logistics of doing rail trail ride.

#### 4. Prioritise the attraction of significant international MTB events

- 4.1. Leverage Tasmania's strong reputation as Australia's mountain biking capital to continue hosting and **attract new high-profile competitions** and spectator-focused events.
- 4.2. **Strategically examine which events present the best yield** in terms of brand building and economic return for Tasmania.
- 4.3. Increase support and grant funding to **develop home-grown events** that have a unique Tasmanian lens, mountain biking events that attract high yielding groups of interstate and international visitors.
- 4.4. **Incorporate the needs of events in iconic trail surrounding region** master planning.

#### 5. Consult with industry experts

- 5.1. **Engage closely with Tasmanian mountain biking industry experts**, including the MTB-N, to guide new proposals and inform investment decisions, ensuring sustainable and strategically aligned growth.

### Elevate: Expand to meet our potential

To elevate Tasmania's MTB tourism potential, the state needs to learn from competitors, collaborate more effectively, build capability in our industry, improve access, attract investment. The following priorities reach beyond existing assets to expand and elevate the Tasmanian MTB experience:

#### 6. Grow Tasmania as an adventure tourism destination

- 6.1. **Develop annual adventure tourism forum** for adventure tourism operators to collaborate and develop adventure tourism strategies that attract an 'adventure tourist' to Tasmania that is likely to embrace several adventure tourism experiences while in the state.
- 6.2. Develop and commit to a **world leading MTB trail building TAFE course** that can raise the industry standard for MTB trail building around the country and the world. Encourage mountain bikers to move to Tasmania and pursue a career in the mountain biking industry, learning from the best builders in the industry.
- 6.3. **Invest in visitor geotracking and other research** to build market knowledge and understanding. This may be at a statewide level as part of the Tasmanian Visitor Survey, or at a more specific level for MTB or adventure visitors.
- 6.4. **Conduct a demand assessment and gap analysis** for Tasmanian adventure tourism as a whole within the current competitive landscape, focusing on the adventure visitor journey and

identifying gaps in experience delivery. The findings from this can support industry development and assist in attracting investment.

## 7. Pursue better access for MTB visitors

- 7.1. **Work with TT Line** on collaborative marketing, visitor information and easy access for bikes on the Spirits of Tasmania.
- 7.2. Advocate with Tourism Tasmania for **additional direct flights** from key markets to reduce accessibility barriers.
- 7.3. Improve awareness and **streamline "bike and drive" options** and airport transfer services from Hobart and Launceston to key mountain biking hubs.

## 8. Attract and leverage private investment opportunities

- 8.1. **Develop an investment prospectus** to support and encourage private investment in complementary services such as mountain bike coaching, guiding, bike washing and laundry. These services enhance visitor experience and create additional business opportunities within mountain biking destinations.

## Key Findings from this report



In the year ending March 2025, Tasmanian MTB tourism:

- Attracted **\$113.3 million** in **direct mountain biking-related expenditure**, with **\$91.7 million** attributed to out-of-state visitors.
- Contributed **\$61 million** to Tasmania's Gross State Product (GSP)
- Supported approximately **345 direct** and **246 indirect** full-time equivalent (FTE) jobs across Tasmania, mostly in regional areas.



### Blue Derby

- Attracted **\$50.9 million direct MTB-related expenditure**
- Catalysed \$26.6 million in direct, indirect and induced value added to the Tasmanian economy
- Supported approximately **274 FTE jobs**.



### Maydena Bike Park

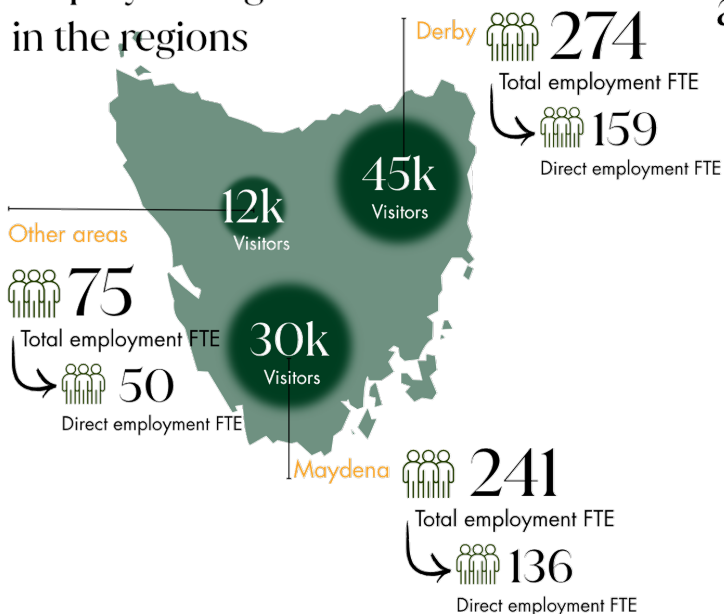
- Attracted **\$49.8 million in direct MTB-related expenditure**
- Catalysed \$28.1 million in direct, indirect and induced value added to the Tasmanian economy
- Supported approximately **240.8 FTE jobs**.



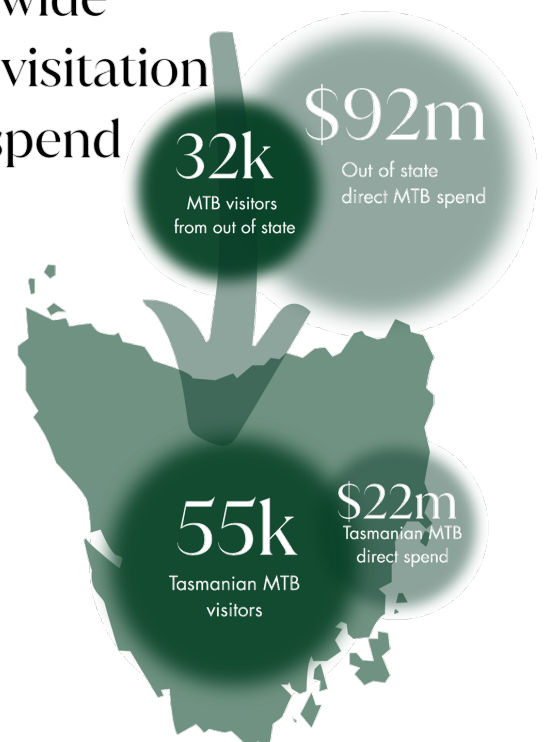
The remaining MTB destinations:

- Attracted **\$12.6m direct MTB-related expenditure**
- Catalysed \$6.3m million in direct, indirect and induced value added to the Tasmanian economy
- Supported **75.1 FTE jobs**.

## MTB visitors and employment generation in the regions



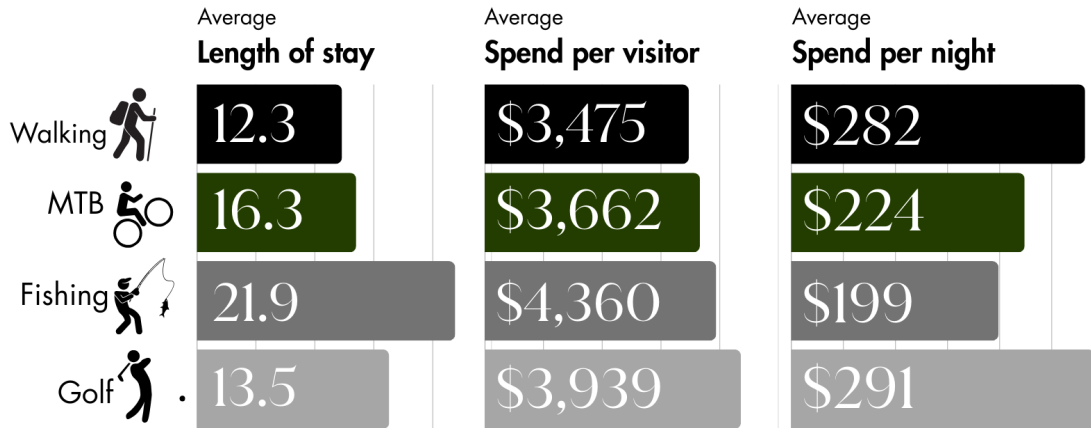
## Statewide MTB visitation and spend



# The Value of Mountain Biking Tourism to the Tasmanian Economy

## Report

MTB tourism attracts a similar yield to Tasmania's other main adventure tourism markets



Interstate and Intrastate MTB visitors spend more, stay longer and visit more regional and nature based attractions than non MTB visitors.

### Intrastate markets



#### Total trip spend



#### Spend per day



#### Length of stay



### Interstate markets



#### Total trip spend



#### Spend per day



#### Length of stay



“What Tasmania offers is something entirely unique. Something that wholeheartedly embraces the truest definition of the term ‘adventure’. Something that out-of-state workers get excited to tell their colleagues about before they come, and long after they return.”

Combined quote of mountain biking operators and stakeholders, 2025.



# 1 Introduction

Tasmania is a premium mountain biking (MTB) destination, renowned for its diverse terrain, pristine wilderness, and world-class trail networks. As more MTB trail networks and experiences are developed across Australia and globally, the market of mountain bikers continuing to grow. Recent forecasts indicate an anticipated 5.8% global CAGR until at least 2029,<sup>4</sup> which is consistent with this report's optimistic growth scenario.

The development of Tasmania's signature MTB destinations Blue Derby and Maydena Bike Park occurred at a critical moment in the rise of MTB as a sport. Increasing participation in the sport and a growing social media profile of major influencers were coupled with significant international exposure when Blue Derby was awarded international trail of the year by riders and industry representatives in the Enduro World Series mountain bike event in 2017 and 2019.

Over the past ten years, these signature MTB destinations have gained international acclaim for their purpose-built trails, which cater to all skill levels and riding styles. Tasmania has embraced its unique landscape and expanded the iconic riding offerings to St Helens, the West Coast and elsewhere throughout the state. These destinations are not only celebrated for their technical excellence but also for their integration with the island's unique geography, offering riders an unparalleled variety of immersive experiences that blend adrenaline with awe-inspiring scenery.

Tasmania is currently at a critical juncture in its MTB tourism journey. Its success as an MTB destination has inspired similar developments elsewhere in Australia and overseas, with several interstate destinations seeking to replicate Tasmania's success in their aspiration

to take a larger share of the MTB tourism market. As Tasmania's MTB product matures, it is important to reflect and consider whether our offering is keeping pace with the growing competition and expectations of the market.

"[We need to] really make the most of our unique landscapes and lean into the quality of terrain we have to offer. We already have an awesome product, and we need to lean into marketing this hard. For Tasmania to remain competitive, we need to market the product as well as developing the product" – Tasmanian MTB operator

## 1.1 Report purpose and scope

Tasmania's State Visitor Economy Strategy identifies eight key directions to maximise the benefits of tourism for the state. These include:

- Growing the contribution that visitors make to Tasmania and maximising overall benefit to the state and regional communities,
- Differentiating and building awareness of Tasmania to attract visitors who will grow value over volume,
- Supporting successful events that enhance Tasmania's brand,
- Investing in infrastructure to support future growth that benefits locals and visitors, and
- Attracting a skilled workforce.

MTB tourism has been recognised for some time as being a high value proposition for Tasmania. Visitors who mountain bike spend more, stay longer and contribute more to small communities across the state than the average Tasmanian visitor. MTB provides a platform for state

<sup>4</sup> Technavio, 2025

differentiation and brand building, attracts major events that target aligned market segments, enhances skilled migration through building liveability, and provides a focal point for heavily-used recreational infrastructure that has measurable economic and non-economic benefits.

The market is not static however. Increasingly, other communities across Australia have recognised the potential of MTB tourism as a major social and economic driver for communities and have invested accordingly in world class riding infrastructure and supporting services. As such, Tasmania has reached a point of needing to become more strategic in managing and developing its MTB experiences to retain its position as one of the world's premier MTB destinations.

With this need in mind, the Mountain Biking Network Tasmania (MTB-N) delivered the Mountain Bike Tourism Action Plan 2024 (MTBAP24). The first recommendation of the MTBAP24 is to measure the economic benefit attributable to MTB tourism in Tasmania. The second is to research the types of experiences that motivate visiting riders to travel to Tasmania, and better understand what experiences would add duration, yield, and frequency to their visits.

Funded by the Tasmanian State Government, the MTB-N has commissioned episteme Consulting to deliver this report as a robustly researched and reliable document that quantifies the contribution of MTB tourism to the state and regional economies, considering impacts of visitors from within and outside Tasmania, and to make recommendations on future investment and development.

In alignment with the classifications from the MTBAP24, this study focuses on Tasmania's iconic MTB destinations. The International Mountain Biking Association's (IMBA) Destination Trail Systems define these as larger trail systems with 25-50+ miles of trail that attract riders from all over the country or world,

providing multiple days of riding, typically featuring a full mix of trail types and difficulty levels.

This study conducts an analysis on Blue Derby & Maydena Bike Park, as sufficient data was collected from each of these destinations to produce reliable findings. Other iconic destinations, such as St. Helens, Blue Tier, Bay of Fires Trail, West Coast Trails, George Town and others have been amalgamated into an 'Other destinations' category to avoid potential conflation of visitation and spend estimates.

## 1.2 Report structure

This report is laid out as follows:

**Methodology** details the data sources and methods of analysis used to deliver the figures reported.

**Economic impact of MTB tourism in Tasmania** examines the economic impact of visitors to Tasmania that is attributable to MTB tourism, and quantifies this at a statewide level. It also explores other non-economic impacts that are important to consider in the development of the market.

**Economic impact of MTB tourism in Tasmania's regions** further analyses the economic impact of MTB visitors to iconic MTB destinations.

**The rider, industry and manager perspective** provides context and insight from different perspectives to support the report recommendations.

**Comparative benchmarking** considers how Tasmania is performing as a destination in comparison with other signature MTB destinations both nationally and internationally, and provides insight into lessons Tasmania can learn from such destinations..

**Looking forward** concludes the report, examining the potential changes to out-of-state mountain biker visitation & spend estimates over a 10-year period, as displayed in three different scenarios. It provides a series of prioritised recommendations.

**Appendices** are in a supplementary document.

## 1.3 Definitions

In this report, the following definitions apply:

**Average Spend** is the calculated average expenditure for that demographic at that destination.

**Average Spend Per Visitor (ASPV)** is the average spend that can be attributed to each visiting individual.

**Consumption** is broader than spend. It includes actual spend plus estimated values of unpaid activities, such as staying in a holiday home, or visiting a museum.

**Direct Employment** is the number of FTE the direct spend for region supports statewide, based on the Tourism Satellite Accounting (TSA) framework.

**Direct Output** is the total value of goods and services created, minus imports, payments to other industries, and taxes – it shows what stays in the sector.

**Direct Spend** is money visitors spend with local businesses, like bike rentals and meals. This can also be expressed as expenditure.

**Direct Value-Added** shows local economic value after business costs are removed. It represents profits (capital) and wages (labour) kept in the community, and is the contribution made to Gross State Product (GSP).

**Indirect Employment** is the number of indirect, flow on FTE the indirect spend supports statewide, based on the TSA framework.

**Indirect Spend** is the business-to-business spend, such as buying fuel for a shuttle bus.

**Indirect Value-Added** is the additional local profits and wages created through supply chain activities that support visitor services.

**Induced Spend** is the additional attributable spend representative of the broader tourism sector activity of MTB tourists.

**International** visitors refers to non-Australian residents who have come from a different country to visit Tasmania.

**Interstate** visitors refers to Australian residents living outside of Tasmania who travelled by plane or ferry to get to Tasmania.

**Intrastate** visitors refers to Tasmanian residents travelling to MTB.

**MTB Attributed** refers to just the portion of that demographic's trip expenditure that can be attributed to the mountain biking component of their trip.

**MTB Infrastructure** is considered to be MTB trails, trail heads, access infrastructure, amenities such as toilets, signage, bike wash stations etc.

**MTB Tourism** is the activity of mountain biking whilst travelling. This could be travelling for the express purpose of mountain biking, or mountain biking whilst travelling.

**MTB Tourists/Visitors** are visitors who MTB on their trip, either for the express purpose of mountain biking, or mountain biking whilst travelling.

**MTB Trails** are defined in alignment with the MTBAP24 definitions. It does not include rail trails, however rail trails are considered important infrastructure to support Mountain Biking activity, and are briefly discussed in this report.

**Spending Individuals** refers to those individuals who spend on their trip. It excludes non-spending children.

**Total Trip** refers to visitors' total expenditure on their whole trip to Tasmania, including non-mountain biking related expenditure.

**Travelling/Tourism** is aligned to the Tourism Research Australia and UNWTO definition of a tourist. That is, a person who is away from their usual environment for less than one year, travelling for leisure, business or other personal reasons, but not for employment in the place they are visiting.

## 2 Methodology

The findings and recommendations of this report are based on established, peer-reviewed economic modelling and tourism analysis techniques. [Appendix 1](#) details further the model used for analysis. These have been adapted to allow for the range of data sources that draw from primary research through surveys and government/operator conversations contextualised against secondary data in the form of existing reports and survey results.

This section details the data sources and how the data was modelled to provide accurate figures and recommendations.

### 2.1 Data sources

Tasmania has well-established visitor measurement and analysis tools, including the Tasmanian Visitor Survey, Regional Tourism Satellite Accounts, and online geotracking applications. These sources alone do not provide sufficient detail to understand the contribution of MTB tourism to the state economy. Primary data was collected to fill this gap. Where two or more data sources were available, the source deemed most reliable has been used, contextualised against the other to ensure a robust and reliable result.

The following describes the main sources of data used in this analysis.

**Secondary data.** Available visitor activity and spend data including the Tasmanian Visitor Survey (TVS), International Visitor Survey (IVS), National Visitor Survey (NVS), trail management authorities and Tourism Satellite Accounts to build an understanding of the current Mountain Biking market and their spend habits. A range of other reports, studies and academic works also support this work, which are listed in the references.

Several trail networks hold data from track counters and uplift data. These have been used

as secondary sources for context checking only throughout this study, due to a lack of consistency across the data collection points and potential double/multi-counting. As a widely-used ride geotracking application, Strava was also used to assist in contextualising visitation data.

**Surveys.** Two online surveys established an understanding of what motivates riders to ride in Tasmania, what their average mountain bike trip looks like and what the corresponding trip spend is, and how important mountain biking is as a driver of their decision to make a trip. The role infrastructure plays in supporting economic development through mountain biking was also assessed.

**Survey 1:** Riders in Tasmania – 321 responses (see [Appendix 2](#) for full survey)

- Online surveys for riders riding over a 3-week period during Easter/ANZAC Day school holidays and then a quiet period post-holidays.
- QR Code/Link - Distributed among local mountain bike destinations at trailheads, amenities, on shuttle buses, and at mountain biking related businesses through booking confirmation emails.
- Designed to understand proportion of rider groups, demographics, trip spend, willingness to pay.
- [Appendix 3](#) details qualitative responses.

**Survey 2:** Potential riders in Tasmania – 31 responses (see [Appendix 2](#) for full survey)

- Online surveys for interstate-based riders considering a MTB trip to Tasmania
- QR Code/Link - Distributed among online MTB communities through existing social media channels, including Mountain Bike Direct's retailer newsletter (a major online MTB equipment retailer).
- Designed to understand interstate interest in visiting Tasmania for mountain biking,

willingness to pay for a Tasmanian MTB trip, what barriers are stopping those interstate visitors from visiting Tasmania for a mountain bike trip, what could get them across the line, and projected economic impact if those barriers were overcome and visitation increased.

**Interviews.** MTB tourism operators and managers in Tasmania

- One-on-one conversations with MTB tourism operators and local governments managing iconic MTB assets.
- Designed to understand drivers of growth areas, regional visitor characteristics, and qualitative evidence of visitation drivers and behaviours of current riders.

## 2.2 Economic Analysis

The complexity of analysing primary and secondary data sources to support established methods of economic analysis has required a bespoke methodology for this project. The main principles of this analysis are detailed below.

### Visitor numbers

Central to understanding the full impact of MTB tourism is to understand visitor numbers and the purpose of their trip. In Tasmania, the most reliable visitation data comes from the TVS, which asks where people visited and for how long, and also whether they engaged in MTB as an activity on their trip. As this does not attribute where visitors were engaging in MTB, regional MTB visitation figures were modelled based on an estimate from the TVS contextualised against other sources, including visitation and usage data from local councils, survey data and geotracking software.

### Accounting For Non-Spending Children

Segmented visitation data was derived from the TVS, including the proportion of visitors travelling with families and the composition of those family

groups (parents with young children, parents with older children, and parents without children).

Survey 1 data further informed demographic-specific visitation estimates (intrastate, interstate, and international) and provided more accurate, destination-specific family attendance rates for Tasmania. For groups with young children, it was assumed — in line with national averages — that each family included 1.8 non-spending children. In these cases, children's spend was assumed to be fully captured within the parents' spend, and these child visitor shares were excluded from spending visitation figures.

For groups with older children, two key assumptions were made:

1. Older children incur higher individual costs (e.g., shuttle use, meals), and
2. They may spend personally, but most spending is still attributed to parents. Therefore, a partial adjustment was applied, with 0.9 individuals per family group removed to reflect their partial economic contribution.

These adjustments were applied to calculate the number of spending individuals visiting Tasmania each year, ensuring that non-spending children are not allocated a full adult trip spend in economic impact estimates. Importantly, children's spend is still captured overall through the parental expenditure.

The weighted number of children was deducted from total visitor counts to provide a final visitation figure that accurately represents spending individuals. This was done proportionally across intrastate, interstate, and international segments.

It should be noted that no evidence from Survey 1 or TVS data suggested international visitors brought children (young or old) to Tasmania for mountain biking. Accordingly, the international visitor count remains unchanged and is assumed to represent spending individuals directly.

## Attributing spend

Survey 1 respondents were asked to indicate the portion of their total trip spend that could be directly attributed to mountain biking. The average of these responses was applied to each corresponding visitor demographic (intrastate, interstate, and international) to determine both the average total trip spend and the mountain biking-attributed spend for mountain biking visitors coming to Tasmania.

It is important to clarify that these figures should not be interpreted as spend within Derby (as an example) alone. Instead, they represent the total spend catalysed by Derby as a trip motivator. For example, "Derby catalysed an average direct spend of \$3,932 per each interstate visitor mountain biking in Tasmania across their entire trip. \$2,992 of which can be attributed specifically to the mountain biking component."

The average total trip spend and MTB-attributed spend were then applied to the respective number of spending individuals in each demographic group (intrastate, interstate, international) to calculate the annual total trip spend and mountain biking-attributed spend for each group.

## Direct spend

Direct spend refers to the immediate expenditures made by visitors during their trips. This includes (but is not limited to) money spent on accommodation, meals and drinks, transport services (such as shuttles), bike hire, trail passes, guiding services, and retail purchases like gear or clothing. These transactions represent the first and most visible layer of economic impact generated by mountain biking tourism.

## Indirect spend

Indirect spend captures the business-to-business economic activity required to support and sustain visitor services. This includes spending by local businesses on supplies, maintenance, equipment, utilities, and professional services. For example, a bike shop buying spare parts

from a Tasmanian distributor, or a café purchasing local produce and ingredients to serve visiting riders. These flow-on transactions strengthen regional supply chains and deepen economic benefits beyond direct visitor interactions.

## Induced spend

The demand side approach to this report captures the MTB industry's specific direct and indirect contributions by measuring all the resident and visitor spend across the MTB industry. The additional attributable spend representative of the broader tourism sector activity from MTB attributable tourists is the induced contribution.

## Direct, indirect and Induced spend example

A mountain biker visiting Derby books accommodation, eats at the Dorset Hotel, and purchases an Up Down Around shuttle pass — this is direct spend. The Dorset Hotel then orders fresh produce from Pyengana Dairy using this money, and Up Down Around buys fuel and spare parts from a garage in Scottsdale — this is indirect spend. On the demand side - the mountain biker also decides to visit MONA museum while on their Tasmanian MTB trip, even though this wasn't their intended trip purpose. This visit to MONA is represented by induced spend.

## Leakages

In the above examples, it is demonstrating complete regional retention of spend. It does not show the proportion of money that flows outside of the region or Tasmania, on MTB goods purchased online from a US based manufacturer, for example. The value-added figures account for such leakage, hence, value added figures are lesser than direct spend figures.

# The Value of Mountain Biking Tourism to the Tasmanian Economy

## Report

### Employment creation

It can be difficult to estimate the number of jobs directly & indirectly created through a tourism industry. As such, the internationally recognised Tourism Satellite Accounting (TSA) economic model has been used to estimate employment creation through direct & indirect spend estimates. It is important to note that these employment figures estimate the FTE supported throughout the state, based on a MTB destinations direct and indirect spend. This is not necessarily what the region currently supports.

**Direct contribution of tourism.** A direct contribution occurs when there is a clear, physical and economic relationship between a mountain biker and the provider of a good or service — such as accommodation, shuttles, bike hire, or food and beverage.

**Direct value added (VA)** captures only the additional value created by producers — that is, the difference between the value of the tourism goods and services sold directly to visitors and the cost of the inputs required to produce them. This represents the contribution to Gross State Product (GSP).

**Indirect contribution of tourism.** Indirect contributions come from the broader supply chain that supports the MTB tourism experience — even if businesses don't interact with riders directly. This includes:

- Cleaning services for rider accommodation
- Fuel supplied to shuttle operators
- Food and beverage suppliers for cafés and restaurants
- Bike part manufacturers or wholesalers supplying local retailers

These upstream and supporting industries benefit from mountain bike tourism through the flow-on demand created by businesses that directly serve visitors.

In Tasmania, these indirect impacts represent a vital — though less visible — part of the total economic value driven by MTB tourism.

**Consumption** represents expenditure plus consumption of non-monetary goods. These goods include use of free public goods, such as free-to-use mountain bike trails. TSA inferred multipliers are then used to derive value added and employment contributions.



Maydena Bike Park –  
Maydena Express  
Credit: Stu Gibson

“These trails challenge riders. They challenge their skill, their fortitude, and their courage. But they are the birthplace of countless lifetime memories. ‘Stick in your mind for the rest of your life’ memories. Friends are made here. Lives are changed here. When you ride these trails, you feel like you’ve come home. These trails make everyone feel like a hero once they’ve finished. Tasmanian mountain biking destinations make you feel like you belong here as a mountain biker – even if it’s your first time on a mountain bike.”

Combined quote of mountain biking operators and stakeholders, 2025.

## 3 Economic impact of MTB tourism in Tasmania

This section reports on the economic impact of MTB tourism in Tasmania on a statewide scale. It briefly details the characteristics of MTB visitors, where they visit and how much they spend, and details the economic contribution of MTB visitors to the state. It also details other less quantifiable contributions that MTB makes to the state.

### 3.1 Attributing spend

A core principle of the analysis in this study is evaluating the spend attributable to the MTB component of a 'trip'. Although total trip spend estimates have been captured, not 100% of this can be attributed to the MTB component. Hence, only the MTB attributable spend is shown and discussed.

To analyse total trip spend per visitor would be to conflate MTB tourism with general tourism, and would lead to unreliable estimates of the true economic impact of mountain biking in Tasmania.

According to data captured in this study, the average length of stay for an out-of-state mountain biker visiting Tasmania is 9.9 days, with an average of 5.67 days spent mountain biking during that time. On average, 81% of their total trip spend is directly attributable to mountain biking activities.

This aligns with additional survey findings showing that 70% of visitors came to Tasmania specifically for mountain biking, 24% included mountain biking as a key part of their trip alongside other purposes, and only 7% visited for reasons unrelated to mountain biking.

### 3.2 A note on economic interpretation

Economic contribution studies provide a snapshot of the contribution of an entity or industry at a particular point in time. In this case, it is Tasmania's MTB industry in the year ending March 2025. The economic analysis employs a Tourism Satellite Account (TSA) framework to measure the economic contribution of MTB attributable spend - capturing resident and attributable out-of-state visitor spending on the MTB industry directly, and across the broader tourism sector. This framework can be considered a demand side approach to measuring the direct, indirect, and induced economic impact of MTB in Tasmania, with findings expressed in value added and employment terms. This approach is consistent with the Australian Bureau of Statistics (ABS) National Accounts framework for measuring Gross Domestic Product, the core measure of wealth or welfare within a national economy.

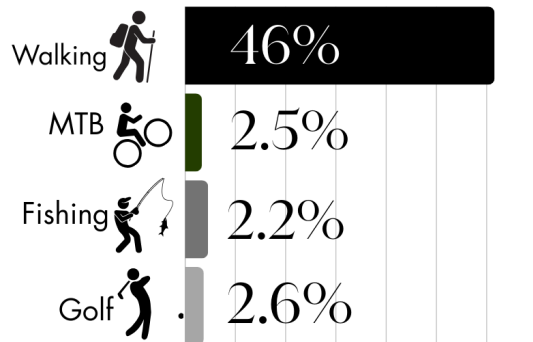
### 3.3 MTB and other activities

Although walking is by far the most popular activity for visitors to Tasmania, MTB is part of a suite of outdoor activities that Tasmania can lay claim to having a significant advantage through the quality of experience and quality of the natural environment. Tourism Tasmania identifies these activities as Unordinary Adventures, and they consist of walking, MTB, fishing and golf.

Figure 1 shows that whilst nearly half of all visitors to Tasmania engage in some kind of bushwalk, MTB, fishing and golf capture around 2.5% of the visitors. Although clear data is not readily available, these figures generally resonate with the participation in MTB tourism by visitors to New Zealand.<sup>5</sup>

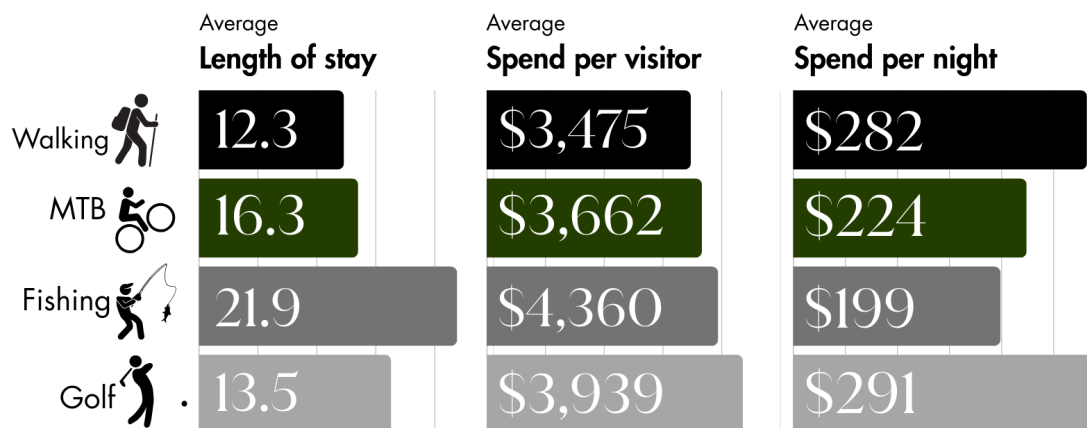
<sup>5</sup> Angus & Associates (2021)

Figure 1. Visitor participation in Tasmania's Unordinary Adventures<sup>6</sup>



In terms of value to Tasmania of these visitor segments, MTB shows comparable value. Figure 2 shows that the average spend per night and per visit by visitors engaging in MTB during their trip is similar to that from walking, golfing and fishing.

Figure 2. Comparative visitor stay and spend for Tasmania's Unordinary Adventures<sup>7</sup>



<sup>6</sup> TVS YE March 2025

<sup>7</sup> TVS YE March 2025

### 3.4 MTB visitor profile

Mountain biking visitors spend more per trip, and more per day than the average interstate and international visitor to Tasmania. Key characteristics of MTB visitors are:

**They are male dominated.** Although changing, mountain biking is a male dominated pastime. In NZ and Australia, the split in participation has been around 80% male to 20% female<sup>8</sup>, and whilst anecdotal evidence suggests that this is changing, there is little data to support it yet. In Europe, a survey conducted in 2015 by the International Mountain Biking Association showed a 94% male to 6% female split, and a number of other studies globally have identified a 90%/10% split<sup>9</sup>. Data from the research supporting this report indicates a 70%/30% split in respondents, which indicates a move towards greater female participation. This 70/30 gender split is also supported by operators interviewed in this report's research.

**They are aged 30-60, well-educated and have higher than average earnings.** Studies across nations indicate that MTBers are generally aged between 30-60, are well educated and earn more than the national average<sup>10</sup>. In Europe, around 38% of MTBers have an academic degree. Aligned with this, over 80% of the respondents in the research supporting this report were aged between 30-60. These findings are also supported by TVS data.

Contrary to broader participation statistics, research by Tourism Tasmania found that 50% of the market are aged under 34 years and are typically part of a couple with no kids or a family with children, although this is not how they usually travel for MTB purposes. As per the participation rates, they are significantly more likely to be male (75% to 25% female), and are

mostly based in New South Wales, followed by Victoria and Queensland.<sup>11</sup>

In the US, the Destination MTB market are characterised by frequent, short breaks; considerable age-based heterogeneity, being middle aged and male, with above average income akin to findings of previous studies of mountain bikers. Regarding income, 84.2% earn more than US\$50,000 (AUD \$78,000) in annual household income, representing predominately above-average income levels. They take an average of five short break trips annually of about 400 miles per trip during the spring and summer months, and in the process spend around US\$400 (AUD \$614) per trip<sup>12</sup>.

"Our primary market is those 45+ who are new to their mountain biking journey, but may have a road biking background. 80% of our market comes from out-of-state. They're keen to try some gravity trails out, but are happy doing some pedalling. E-bike rentals make up ~50% of our rental bike demand" - Tasmanian MTB Operator

**Mountain biking is part of a broader package of experiences.** In Europe, the International Mountain Biking Association (IMBA) identified that the top five reasons to ride are:

1. To enjoy nature
2. To escape everyday life
3. For excitement
4. To improve skills
5. Socialising, having fun<sup>13</sup>

<sup>8</sup> AusPlay (2020)

<sup>9</sup> Buning and Gibson (2016)

<sup>10</sup> AusCycling (2021), AusPlay (2021), Buning et al. (2019), IMBA (2018)

<sup>11</sup> Tourism Tasmania (2021)

<sup>12</sup> Buning et al. (2019)

<sup>13</sup> IMBA (2015)

Similarly, Destination Queenstown insights<sup>14</sup> identified the following preferences for NZ MTB riders:

- Appreciating scenery/views/nature
- An undulating route
- Forest settings
- Socialising with others
- Exploring new areas
- Ride duration of 2-3 hours
- Smooth/fast/open track surfaces
- Some speed/excitement/risk
- Exercise/fitness workout

“Our guests want another reason to come back and do something different. They want a new fully immersive wilderness experience that’s compelling enough for them to return [from out-of-state] to do it again. People really want that natural beauty” – Tasmanian MTB Operator

**MTB is predominantly not a winter pastime.** An overwhelming preference for mountain biking being a non-winter activity has been quantified by US based research. MTB-specific trips in summer months (34.3%) closely followed by autumn (33.3%) and spring (30.7%). Only a negligible proportion of respondents preferred mountain bike trips during winter (1.8%).<sup>15</sup> Although Tasmania maintains (with the exception of Maydena Bike park) a year round season, evidence from stakeholder interviews highlights a rider preference for mountain biking in Spring, Summer & Autumn.

**MTB visitors are more likely to arrive on the Spirits of Tasmania.** Around 25% of visitors to Tasmania who MTB arrive on the Spirits, compared with around 11% of all visitors. This indicates a significant opportunity as the new Spirits come online for Tasmania with a projected 40% increase in capacity (although

not necessarily converting to a 40% increase in visitation).

Visitors who arrive on the Spirits tend to stay longer, travel into more regional areas and visit more attractions. **Appendix 4** shows the difference between the percentage of all visitors compared with those visitors who mountain bike when visiting Tasmania. This shows a high level of engagement with Tasmania’s regional areas, national parks and natural attractions, as well as cultural attractions, such as MONA, although they are less likely to visit Salamanca Markets.

<sup>14</sup> Destination Queenstown Resource Gathering (2021)

<sup>15</sup> Buning et al. (2019)

### 3.6 Statewide MTB Visitation

The TVS indicates that in the year ending March 2025, 31,754 out-of-state visitors to Tasmania participated in mountain biking as an activity while in the state. Tables 1-3 show the visitation estimates that form the basis of the analysis of this report. These have been derived using a mixture of TVS data and, data observed in survey 1 analysis, and data communicated through interviews with operators.

With the exception of the 24 months throughout COVID between March 2020 and March 2022, this has followed a steady and positive upward trend since 2014. Inclusive of the decline in mountain biking visitation in 2020 & 2021, the data shows an average increase of ~1,800 visitors per year visiting Tasmania and participating in mountain biking. This represents a compound annual growth rate (CAGR) of 14%.

However, the CAGR of MTB visitation since 2018 is 5.2%. This difference is reflective of a significant uptake in visitation after the opening of iconic MTB destinations such as Maydena Bike Park, Blue Derby, George Town, St. Helens, West Coast Trails, Wild Mersey etc. It should be noted that this growth is slowing. The CAGR between 2022 and 2025 is just 2.7%, and could be expected to slow further as mainland Australian destinations continue threatening to take MTB visitors who would otherwise come to Tasmania to mountain bike.

MTB visitors, while significant in impact, make up just 2% of total Tasmanian tourism visitation. This indicates that a significant opportunity exists to grow MTB tourism and its accessibility to the general tourist visiting Tasmania.

Table 1. Visitation Estimates – By Destination

Place	Total visitation	Spending Individuals
Blue Derby	45,148	39,247
Maydena Bike Park	30,000	26,309
Other Destinations	11,599	10,100
<b>Total</b>	<b>86,747</b>	<b>75,656</b>

Table 2. Visitation Estimates – By Visitor type

Origin	Total visitation	Spending Individuals
Intrastate	54,994	47,001
Interstate	25,927	22,830
International	5,826	5,826
<b>Total</b>	<b>86,747</b>	<b>75,656</b>

Table 3. Visitation Estimates - Out-of-State Visitors Only

Origin	Total visitation	Spending Individuals
Out-Of-State Only	31,753	28,656
<b>Total</b>	<b>31,753</b>	<b>28,656</b>

### 3.7 MTB attributed contribution to the state economy

In the year ending March 2025, over 30,000 out-of-state visitors to Tasmania participated in mountain biking as an activity while in the state. Whilst intrastate MTB visitor numbers are higher than those from out of state, they spend far less time and money on their visits, and make a smaller overall contribution. The table below shows the difference between MTB direct spend in out of state and intrastate visitation and spend.

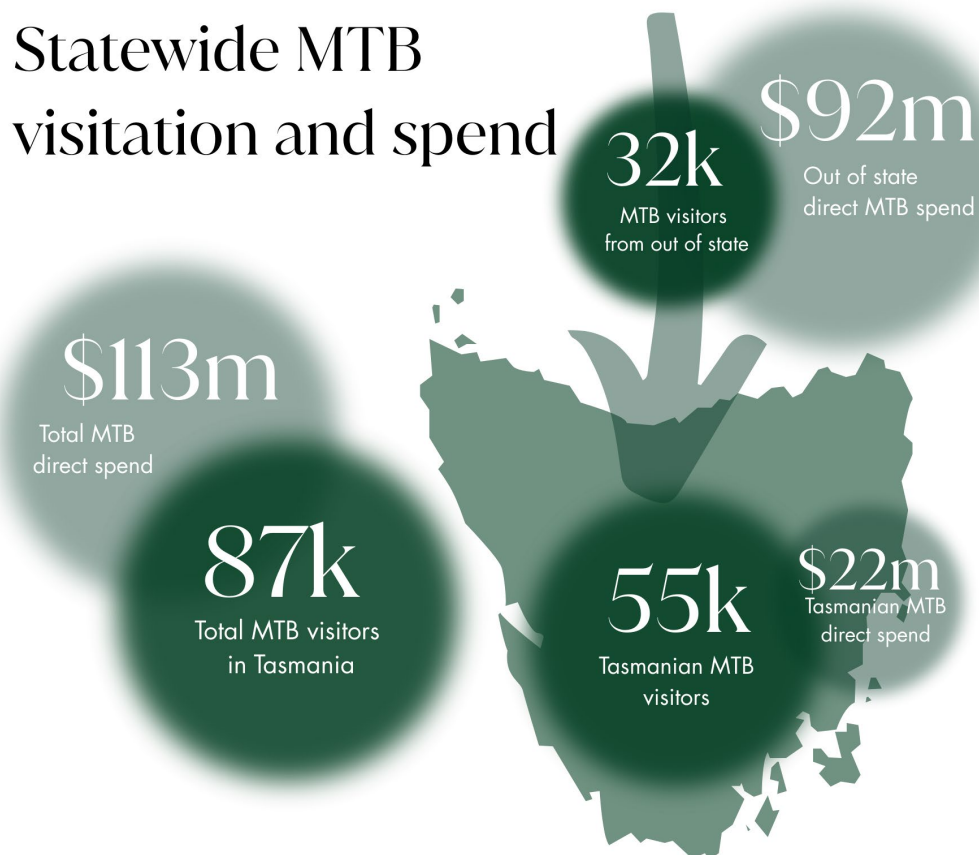


Table 4. Total spend of MTB visitors in Tasmania per year<sup>16</sup>

	Total Trip	MTB Attributed
Total spend of MTB visitors per year	\$142,759,434	\$113,254,130
Total spend of Tasmanian MTB visitors per year	\$26,229,795	\$21,529,458
Total spend of out of state MTB visitors per year	\$116,529,639	\$91,724,672

Table 5. Statewide MTB Attributed Economic Contribution

	Direct	Indirect	Total
Consumption (\$m)	\$117.1	-	\$117.1
Value added (\$m)	\$36.7	\$24.3	\$61.0
Employment (FTE)	344.8	245.5	590.3

<sup>16</sup> Further explanation on these economic contribution figures can be found in the appendices to this report.

Table 5 shows that MTB tourism contributed \$61m to gross state product (GSP) in the year ending March 2025. \$36.7m of this is through direct MTB attributed spend, and \$24.3m comes indirectly through flow-on indirect economic activity. By assessing consumption of non-monetary goods, such as the use of public goods (free public MTB trails, for example), we see a consumption figure for the year ending March 2025 of \$117.1m. Modelling shows that this economic activity supports 345 direct FTE jobs and 246 indirectly, contributing to potential for 590 FTE jobs being supported in Tasmania, as catalysed by mountain biking tourism.

### 3.7.1 Insights from operators on spending

Across the businesses interviewed in this project, out-of-state visitor spending emerged as a critical economic driver. Several operators estimate that between 70% and 99% of their customers come from interstate or overseas, with many undertaking full-service packages, including shuttles, guiding, and accommodation. This claim is supported by the primary data collected in this research, which shows a significantly higher per-visit spend from out-of-state visitors relative to intrastate visitors.

Businesses consistently reported high per-visitor spend, with extended stays of 3–5 days boosting local spend across accommodation, food and beverage, retail, and ancillary tourism activities. For example, Blue Derby alone has an estimated 45,000 visitors per year, feeding into the local economy and driving shoulder season visitation outside of traditional summer peaks. These extended visits are consistent with survey 1 findings that showed a median interstate visitor stay in Tasmania of 9 days.

"70% of them [guests] do the full bike and shuttle package, staying 3 to 5 days. They're not just here for the trails — they spend in the town, restaurants, and local shops." - Tasmanian MTB Operator.

### 3.7.2 Insights from operators on employment

Interviews with operators indicate that while seasonality persists, many businesses have expanded from minimal staffing to large teams. For example, one business evolved from a single bus operation to running fourteen buses, increasing local employment demand to fourteen casual staff during peak season.

Another employs 10 full-time permanent staff and up to 75 total staff during peak season, spanning hospitality, coaching, maintenance, and retail.

"We started with an 8-seater bus; now we have fourteen buses including multiple 25-seaters and a much bigger team. We've become a serious employer in the [NE Tas] region." – Tasmanian MTB Operator

Although employment of ~15 staff may not be considered significant on a state level, it is significant in the context of a small town (such as Derby, for example) which, during the last census in 2021, saw a population of just 109 people<sup>17</sup>.

Industry wide employment growth also includes specialist trail builders, coaches, guides, hospitality workers, a significant Airbnb cleaner demand, publicans, event support roles and many others, reinforcing economic diversification in regional areas.

<sup>17</sup> Australian Bureau of Statistics, 2021

This growth has driven major expansions in infrastructure (new trails, shuttle fleets, bike rental fleets) and catalysed investment in accommodation and supporting services. Businesses highlighted the role of mountain biking in boosting local property values and driving the development of new eateries, shops, and tour experiences.

"We began in the 2016/17 season, and by 17/18, we were really roaring along. By 2019 it was just insane. Every time we'd need a new bus, we'd just go and buy one"  
- Tasmanian MTB Operator

In terms of flow-on effects for business, Break O'Day Council credit the development of MTB trails in their region for new businesses such as *Easy Tiger* and expansions such as the *Big 4 Caravan Park* and *Tasman Caravan Park* investments – this was approximately \$20M of investment.

### 3.8 Market specific MTB Attributed Contribution to the State Economy

This section provides more insight into the relative value of the intrastate, interstate and international MTB visitors compared with their non-MTB counterparts.

#### 3.8.1 Intrastate Visitor Spend Characteristics<sup>18</sup>

## Intrastate markets



Intrastate MTB visitors in Tasmania spend an average of \$577 on their total trip over an average of 3.1 days (\$186 per day). \$468 of this spend can be attributed to the mountain biking component of their trip (\$151 per day). The average length of time taken to get to their mountain biking destination is 3 hours and 5 minutes.

#### Total trip spend

MTB visitor 

\$577

Holiday visitor 

\$416

#### Spend per day

MTB visitor 

\$186

Holiday visitor 

\$169

#### Length of stay

MTB visitor 

3.1 days

Holiday visitor 

2.5 days

Table 6. Spend by category from the intrastate market

Category	Avg Spend	Avg spend per MTB day/night
MTB Attributed Spend	\$468.44	\$150.82
Accommodation spend <sup>19</sup>	\$229.22	\$73.80
Food & drink spend	\$184.4	\$59.38
MTB goods spend	\$263.20	\$84.74
Travel time to/from destination	3 hours 5 minutes each way	-

<sup>18</sup> Data sourced from Survey 1.

<sup>19</sup> Only 39.7% of Tasmanians pay for accommodation on a mountain bike trip. This figure excludes \$0 spends for those free camping, staying at non-paid accommodation sites, and doing day trips. 29.4% of Tasmanians on mountain biking trips do so as a day trip.

### 3.8.2 Interstate Visitor Spend Characteristics<sup>20</sup>

## Interstate markets



Interstate visitors in Tasmania spend an average of \$4,412 on their total trip, over an average of 9.9 days (\$443 per day). The average number of mountain biking days on this trip is 5.58, and the average mountain biking attributed spend is \$3,396 (\$608 per mountain biking day). The average interstate visitor spends an additional \$1,883 getting to/from Tasmania.

#### Total trip spend

MTB visitor 

\$4,412

Holiday visitor 

\$3,488

#### Spend per day

MTB visitor 

\$443

Holiday visitor 

\$365

#### Length of stay

MTB visitor 

9.9 days

Holiday visitor 

9.6 days

Table 7. Spend by category from the interstate market

Category	Avg Spend (Total Trip)	Avg spend per MTB day/night
MTB Attributed Spend	\$3,396.17	\$607.65
Accommodation spend	\$1,374.10	\$137.98
Food & drink spend	\$911.57	\$91.53
MTB goods spend	\$981.18	\$98.52
Travel cost to/from destination	\$1,883.42	-

Average length of stay: 9.9 days (6.6 MTB days)

<sup>20</sup> TVS YE March 2025

3.8.3 International Visitor Spend Characteristics<sup>21</sup>

# International markets

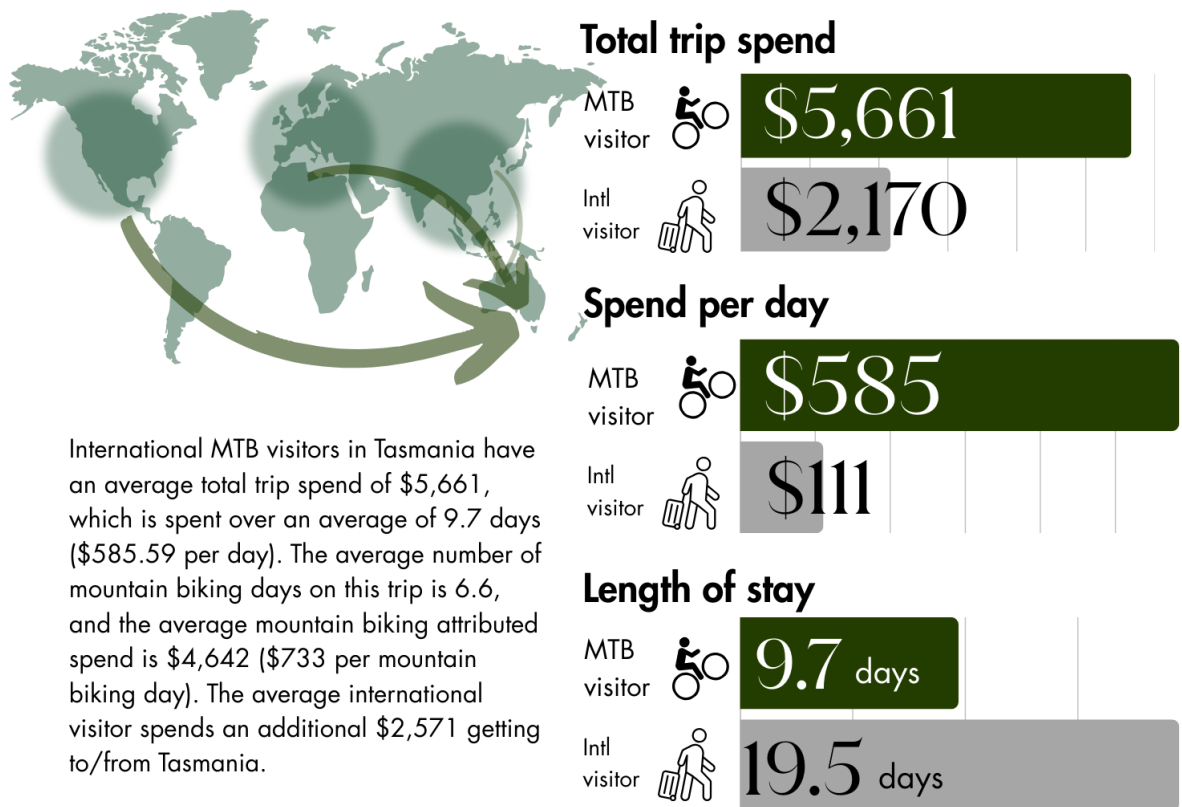


Table 8. Spend by category from the international market

Category	Avg Spend (Total Trip)	Avg spend per MTB day/night
MTB Attributed Spend	\$4,641.79	\$732.91
Accommodation Spend	\$1721.43	\$178.08
Food & Drink Spend	\$942.86	\$97.51
MTB Goods Spend	\$935.71	\$96.80
Travel cost to/from destination	\$2,571.43	-

Average length of stay: 9.7 days (6.6 MTB days)

<sup>21</sup> TVS YE March 2025

## 3.9 Seasonality

Mountain biking in Tasmania is seasonal. **Figure 3** shows the seasonal influence of mountain biking in Tasmania for out-of-state visitors. The blue line shows the 8-year average. The orange line shows the most recent 12 months. These figures have been averaged over the past eight years, and are based on TVS out-of-state visitation data. Although the summer peak is experiencing similar visitation in 2025 relative to the past eight years, there is a clear increase in mid-winter and spring visitation today, relative to the past eight years.

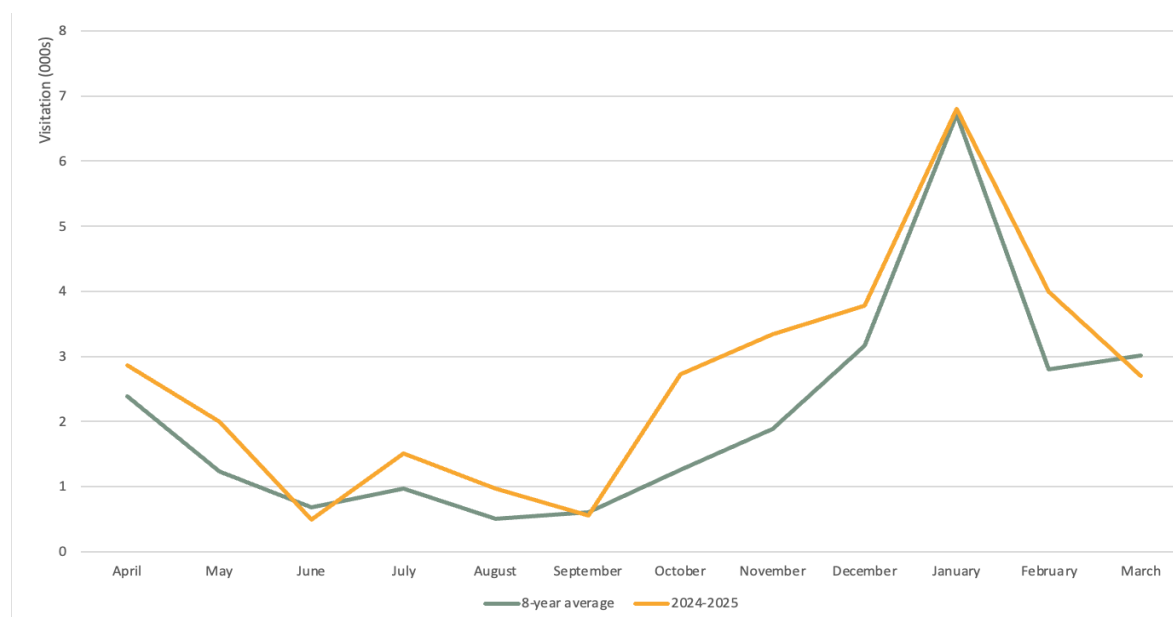
This seasonality is likely based on four primary factors:

1. **Reduced winter appeal.** Mountain biking is wet and cold in Tasmania in winter, limiting its appeal relative to summer. This is likely to be particularly evident for those travelling with young children.
2. **Optimal summer conditions.** Tasmania has a cooler summer that attracts northern hemisphere visitors and northern Australian visitors, where conditions are

either too hot (northern Australia) or too cold (northern hemisphere) for mountain biking, leading to Tasmania being perceived as an optimal summer destination.

3. **Northern hemisphere market influence.** Visitation is low in winter, as more appealing mountain biking conditions exist elsewhere at that time of year. Many northern hemisphere destinations have a set mountain biking season. Outside of this season, destinations become ski focused, hence visitation is limited to their summer months/Tasmania's winter months.
4. **Holiday periods.** What is often considered 'optimal' conditions for mountain biking in Tasmania coincides with the long end of year school holidays, and Tasmania's busy season. This is likely to attract a significant share of mountain biking families to Tasmania.

**Figure 3. Seasonal variation of MTB visitation in Tasmania by month**



## 3.10 Non-economic impacts of MTB tourism in Tasmania

This report quantifies the economic impacts of MTB tourism on the state as a whole and at a regional level, however these are not the only important impacts of the industry. As a visitor market who spends more and stays longer and with more disposable income, the MTB market travels to the regional areas of the state, injecting much needed spending power into smaller communities.

MTB also impacts liveability and desirability of towns. A new resident survey in Break O' Day Council found that around 25% of people moving to the area were influenced in some way by the MTB trails.<sup>22</sup>

Aside from the genuine value that MTB visitors bring to Tasmania in communities where it is most needed, MTB tourism supports the Tasmanian brand and broader tourism product. Aligned with adventure tourism, environmental protection, immersion in nature and personal freedom, mountain biking is the quintessential Tasmanian tourism activity. Investment in building this market brings benefits for the brand as well as the community.

“There is more riding on Hobart LGA MTB trails than five years ago because of Tasmania’s national profile and MTB reputation” – City of Hobart

Other important but unaccounted for contributions to the state include the health benefits of an active population. A GHD Advisory & AusCycling<sup>23</sup> report indicates a number of compelling findings, including:

- The estimated health benefit (the personal and health system benefits due to healthier, active individuals) to communities is \$1.58 per kilometre ridden.
- The positive association between sport and physical recreation, and educational outcomes, (the human capital uplift), is estimated at \$252 annually per rider or \$2.50 per ride.
- The satisfaction people derive from participating in sport and active recreation (consumer surplus) is estimated at \$2,624 per annum per person or \$25.98 per ride.
- The civic and volunteering benefit, which is defined as the value people place on volunteering and enjoying sport and recreation activities is estimated at \$3,214 per annum per person.
- The estimated 341,900 mountain bike participants throughout Australia directly spend \$630.8 million per annum and support 6,095 full time employees annually through riding at their local trails.

<sup>22</sup> Break O' Day Council (2025)

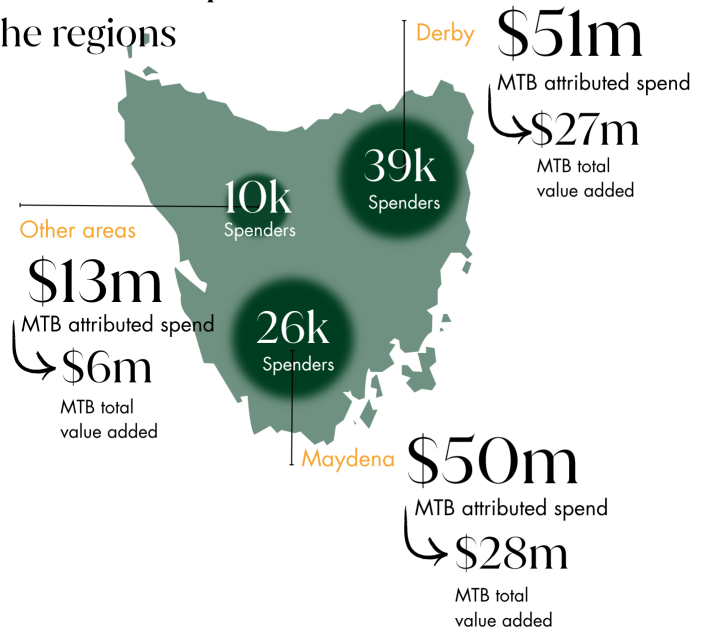
<sup>23</sup> GHD Advisory (2021)

## 4 Economic impact of MTB Tourism in Tasmania's Regions

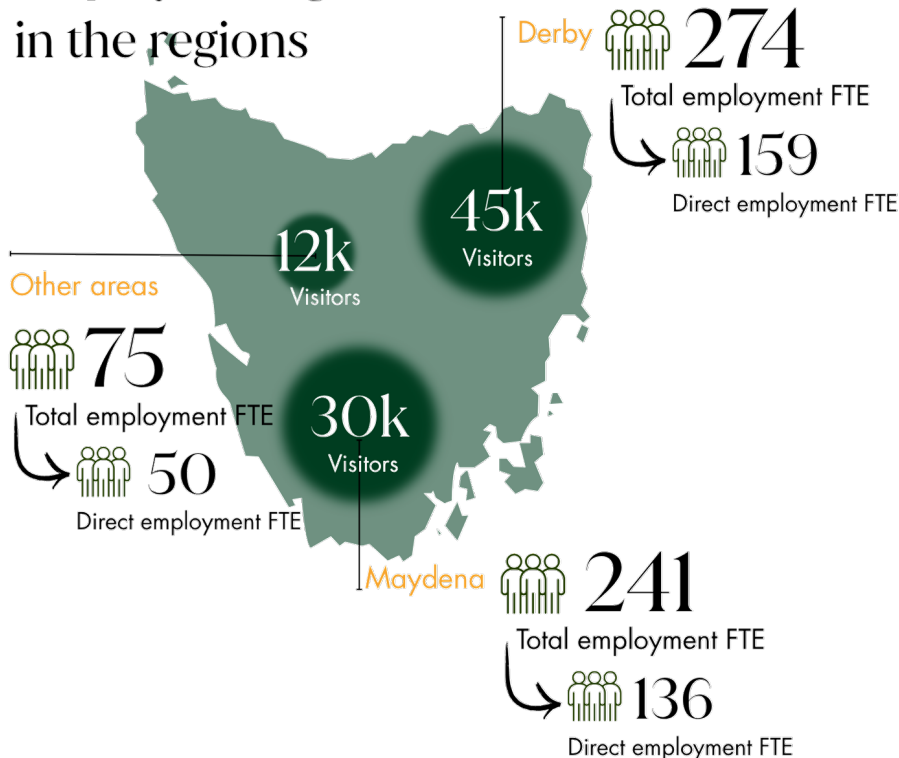
Mountain biking tourism has become a major economic force in regional Tasmania, driving spending, employment, and business growth. While external competition is intensifying, Tasmania has the potential to lead the national mountain biking market with clever sustained investment and strategic support.

The infographics on this page illustrate the visitor spend in Tasmania's main regions and the employment this catalyses. They show that Maydena attracts fewer spending visitors, yet achieves nearly the same MTB attributed spend & value added as Blue Derby. This is likely due to Maydena's attraction of high yielding out-of-state visitors compared with Blue Derby, which attracts a greater share of intrastate visitors who typically spend less, and are less likely to book accommodation.

### MTB visitor spend in the regions



### MTB visitors and employment generation in the regions





### 4.1 Blue Derby

In the ten years since Derby launched its first 20km of the Blue Derby Trail Network in February 2015, the town has hosted the World Enduro Series three times and spearheaded the development of mountain biking as an icon of the Tasmanian tourism experience.

Annual visitation to Blue Derby was calculated using TVS data for out-of-state Blue Derby MTB visitation for the year end March 2025 (12,009 visitors), applying interstate - international split based on primary data, and solving for intrastate visitation based on Survey 1 visitation demographic data.

Blue Derby, with MTB attributable spend of \$50.9m, catalysed an estimated \$26.6 million in direct, indirect and induced value added to the Tasmanian economy in the year ending March 2025, supporting the potential for 274 FTE jobs.<sup>24</sup>

Table 9. Blue Derby direct MTB attributed spend across intrastate, interstate and international visitors.

Visitor origin	MTB Visitor %	MTB Visitors	Spending Individuals	MTB ASPV	MTB attributed direct spend
Intrastate visitors	73.4%	33,139	28,321	\$556	\$15,744,161
Interstate visitors	20.1%	9,075	7,991	\$2,992	\$23,908,561
International	6.5%	2,935	2,935	\$3,823	\$11,220,314
<b>Total</b>	<b>100%</b>	<b>45,148</b>	<b>39,247</b>		<b>\$50,873,035</b>
Out of state total	26.6%	12,009	10,926		\$35,128,875

Table 10. Blue Derby Economic Contribution to Tasmania

	Direct	Indirect	Total
Consumption (\$m)	\$52.6	-	\$ 52.6
Value added (\$m)	\$15.6	\$11.1	\$26.6
Employment (FTE)	159	115	274

Table 9 indicates that Blue Derby catalysed a direct spend of \$50.9m in Tasmania in the year ending March 2025. \$35.1m of this is out-of-state direct spend. Out-of-state visitors contribute the significant majority of spend from all Blue Derby catalysed MTB visitors, despite only making up 20.1% of visitors. International visitors had an average MTB attributed spend significantly greater than the intra and interstate visitor averages, highlighting the importance of attracting and retaining overseas visitors. Out of state visitors only make up just over a quarter of all spending visitors to Blue Derby, yet contribute 69% of the total MTB attributed spend catalysed by Blue Derby.

Table 10 shows that of this direct spend, \$26.6m is represented as true value added to the Tasmanian economy, and is counted in gross state product (GSP). A significant consumption of non-monetary goods (use of public, free MTB trails being a typical example) can be seen with a total consumption figure of

<sup>24</sup> Where value added reflects the contribution of Tasmania's MTB industry to Gross State Product

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\$52.6m. Stemming from this economic activity, the internationally recognised Tourism Satellite Accounting (TSA) framework model estimates that spend catalysed by Blue Derby is supporting 159 direct FTE and 115 indirect FTE for a total of 274 FTE throughout the state.

“There is something for everyone. Kids like blacks, I like blues. Then we do family rides together like Atlas and Blue Tier.” – Anonymous respondent.





## 4.2 Maydena Bike Park

Since Maydena officially launched in 2018 it has established itself as arguably the finest gravity park in Australia, hosting events including the 2023 Enduro World Cup, and the internationally acclaimed Red Bull Hardline.

Annual visitation to Maydena Bike Park was supplied by Maydena Bike Park.

Maydena Bike Park, with a MTB attributable spend of \$49.8m, catalysed an estimated \$28.1 million in value added to the Tasmanian economy in the year ending March 2025, supporting the potential for 240.8 FTE jobs.<sup>25</sup>

Table 11. Maydena direct MTB attributed spend across intrastate, interstate and international visitors.

Visitor origin	MTB Visitor %	MTB Visitors	Spending Individuals	MTB ASPV	MTB direct spend
Intrastate visitors	47.7%	14,312	12,232	\$386	\$4,724,917
Interstate visitors	45.0%	13,486	11,875	\$3,071	\$36,474,156
International	7.3%	2,202	2,202	\$3,913	\$8,617,021
<b>Total</b>	<b>100%</b>	<b>30,000</b>	<b>26,309</b>		<b>\$49,816,094</b>
Out of state total	52.3%	15,688	14,077		\$45,091,177

Table 12. Maydena Economic Contribution to Tasmania

	Direct	Indirect	Total
Consumption (\$m)	\$51.5	\$ -	\$51.5
Value added (\$m)	\$17.2	\$10.9	\$28.1
Employment (FTE)	135.7	105.1	240.8

Table 11 shows that Maydena Bike Park catalysed a direct, MTB attributable spend of \$49.8m for the year ending March 2025. \$45.1m of this is out-of-state specific spend. In line with findings from Blue Derby, interstate visitors contributed the significant majority of Maydena Bike Park catalysed MTB attributed spend in Tasmania, with \$36.5m coming from interstate visitors. International visitor average spend was nearly \$1000 greater per individual than interstate visitor average spend, similarly highlighting the economic importance of attracting high-yielding international visitors to the state for mountain biking.

Table 12 shows that of this direct spend, \$28.1m is represented as value added to the Tasmanian economy. Stemming from this economic activity, It is estimated that spend catalysed by Maydena Bike Park is supporting 136 direct FTE and 105 indirect FTE for a total of 241 FTE throughout the state.

<sup>25</sup> Where value added reflects the contribution of Tasmania's MTB industry to Gross State Product

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The figures in [Table 12](#) have been calculated using the internationally recognised Tourism Satellite Accounting (TSA) framework. It is important to note that *Direct Employment (FTE)* is not a measure of how many FTE Maydena currently supports. Rather, it is an indication of the statewide direct FTE supported as a result of Maydena Bike Park attributable spend across MTB operators and the broader tourism sector.

“Maydena has amazing trails and an amazing vibe. The community around the park is so welcoming and the natural environment – even if I wasn’t riding my bike - would be a spectacular place to spend time. It’s got it all.” – Anonymous respondent

Further to these figures, a case study in section 6.3 of this report estimates a total spend from all people attending two major events held at Maydena in 2025. Together, the total estimated spend from Red Bull Hardline and Gravity Fest visitation is estimated to be \$4.16m. Based on these estimations, the total value added for Red Bull Hardline could be up to \$2m, whilst Gravity Fest could be up to \$300,000. See the case study for further details.





## 4.3 Other mountain biking destinations - cumulative

St. Helens, George Town, West Coast Trails, Wild Mersey, kunanyi/Mt. Wellington etc. Whilst Derby and Maydena are arguably the most well-known and iconic MTB experiences in Tasmania, there are several other destinations that are frequently visited by other out-of-state mountain biking tourists.

While TVS data is available for Tasmania’s other mountain biking destinations, it has not been used in this analysis due to concerns around the accuracy of the TVS methodology for estimating MTB-specific visitation to these regions. To avoid potential conflation or overestimation of out-of-state mountain biking visitation, these figures have been excluded.

Instead, it is assumed that the known MTB visitors to Tasmania that DID NOT ride at Maydena Bike Park or Blue Derby instead mountain biked at one of the other Tasmanian mountain biking destination. As such, visitation to these remaining destinations has been amalgamated into the category ‘Other mountain biking destinations – cumulative’.

Cumulatively, these other mountain biking destinations had an estimated direct MTB attributed spend of \$12.6m for the year ending March 2025, with a \$6.3m total value added to the state economy, supporting the potential for 75.1 jobs.

The estimated categorisation of these remaining visitors, based on survey 1 data is shown below.

Table 13. Other MTB destinations direct MTB attributed spend across intrastate, interstate and international visitors.

Visitor origin	MTB Visitor %	MTB Visitors	Spending Individuals	MTB ASPV	MTB direct spend
Intrastate visitors	65.0%	7,543	6,447	\$164	\$1,060,379
Interstate visitors	29.1%	3,366	2,964	\$2,992	\$8,868,533
International	5.9%	689	689	\$3,823	\$2,636,087
<b>Total direct spend</b>	<b>100%</b>	<b>11,599</b>	<b>10,100</b>		<b>\$12,565,000</b>
Out of state total	35.0%	4,055	3,653		\$11,504,620

Table 14. Other Tasmanian MTB Destinations Economic Contribution

	Direct	Indirect	Total
Consumption	\$13.0	\$-	\$13.0
Value added (\$m)	\$3.9	\$2.4	\$6.3
Employment (FTE)	49.7	25.4	75.1

Table 13 indicates that the other Tasmanian mountain biking destinations cumulatively catalysed a direct spend of \$12.6m in the year ending March 2025. \$11.5m of this is out-of-state attributed spend. As is the case with both Blue Derby and Maydena Bike Park, the other Tasmanian MTB destinations see the

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greatest spend coming from the interstate market, with \$8.9m of direct spend catalysed by these destinations. Intrastate mountain bikers are hugely important to these other destinations, as their more frequent and consistent visitation to such destinations smooth the economic spend flow throughout the year (to a greater extent than out-of-state markets), enabling businesses to stay afloat throughout the quieter months.

**Table 14** shows that of this economic activity, \$6.3m is represented as value added to the Tasmanian economy, and is counted in GSP. The TSA framework model estimates that spend catalysed by the other Tasmanian MTB destinations is supporting 50 direct FTE and 25 indirect FTE throughout the state, as catalysed by these other MTB destinations.



## 5 Rider, industry and manager perspectives

Aside from the economic insights, other perspectives emerged from this research that can support priorities for evolving MTB Tourism. This section details the perspectives and priorities that emerged through surveys with the riders, industry and managers.

### 5.1 The rider perspective

Understanding the rider perspective is critical to making effective investment decisions. Without fully understanding the priorities of the visiting MTB market, decision making could miss the mark entirely, which for a highly networked and connected market, could have wide ranging impacts. This section shares insight from the riders that underpin the recommendations of this report.

#### 5.1.1 Influences on decision to visit

Whilst the profile of Derby and Maydena are known to be key influencers in the decision to travel to ride, this research provides insight into the relative importance of key influencing factors.

Figure 4 shows the relative level of importance attributed to different factors influencing the decision to ride.

These results indicate the critical importance of maintaining the existing trail network to a high standard and the desire for a range of trails. Riders highlight the importance of Tasmania's natural wilderness and environment, and the variety of high quality terrain that comes with it.

It also shows that the vibe of the town is an important to nearly half of respondents, with over a quarter indicating that the vibe is very important to them. This was supported by several operators who also commented on the need for infrastructure supporting the vibe of a town.

Further down the list, but still considered important, is the access to supporting experiences, such as shuttle buses and visitor experiences including food and beverage, accommodation and activities.

Although a lower importance was attributed to 'Other good activities nearby', this may be because the survey was predominantly mountain biking respondents. Interviews with operators suggested that many non-mountain biking visitors still visit mountain biking towns seeking activities to do that fit the adventure theme. This is regarded by operators as very important in attracting whole families / friendships groups, as it ensures all members of the party have a sense of belonging in the town.

Figure 5 supports these findings, showing how riders ranked the options given to them for investment suggestions. This again shows that more trail options and more trail maintenance are important to riders, along with more supporting experiences.

Figure 4. How important were the following factors in influencing your choice to ride here?

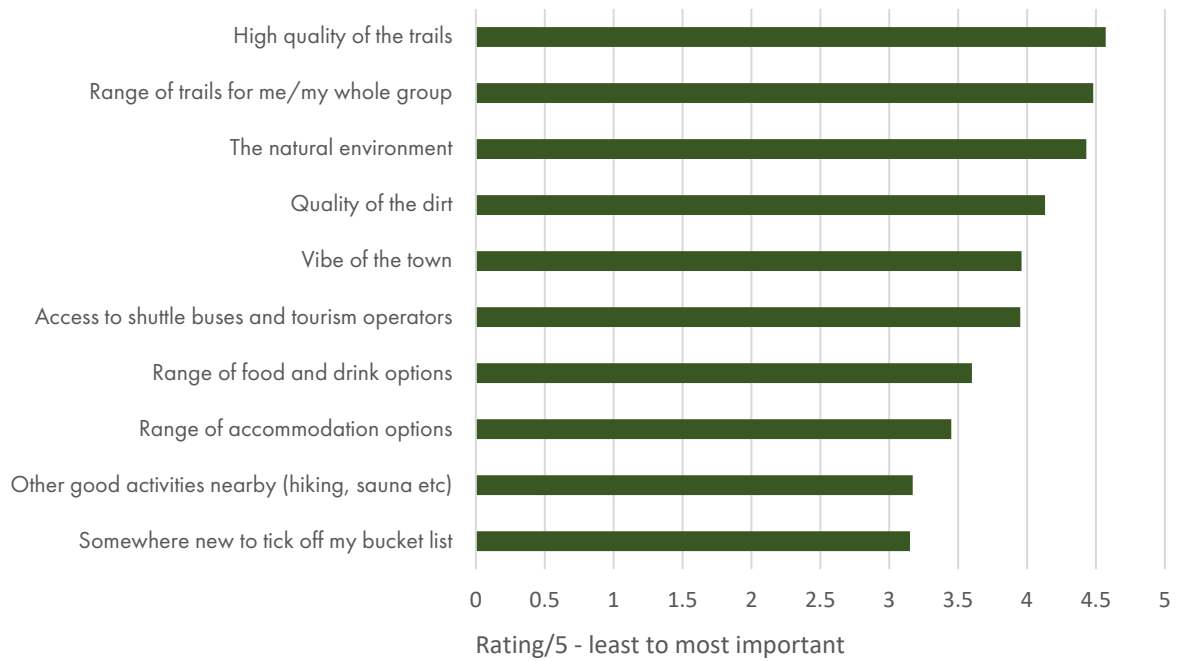
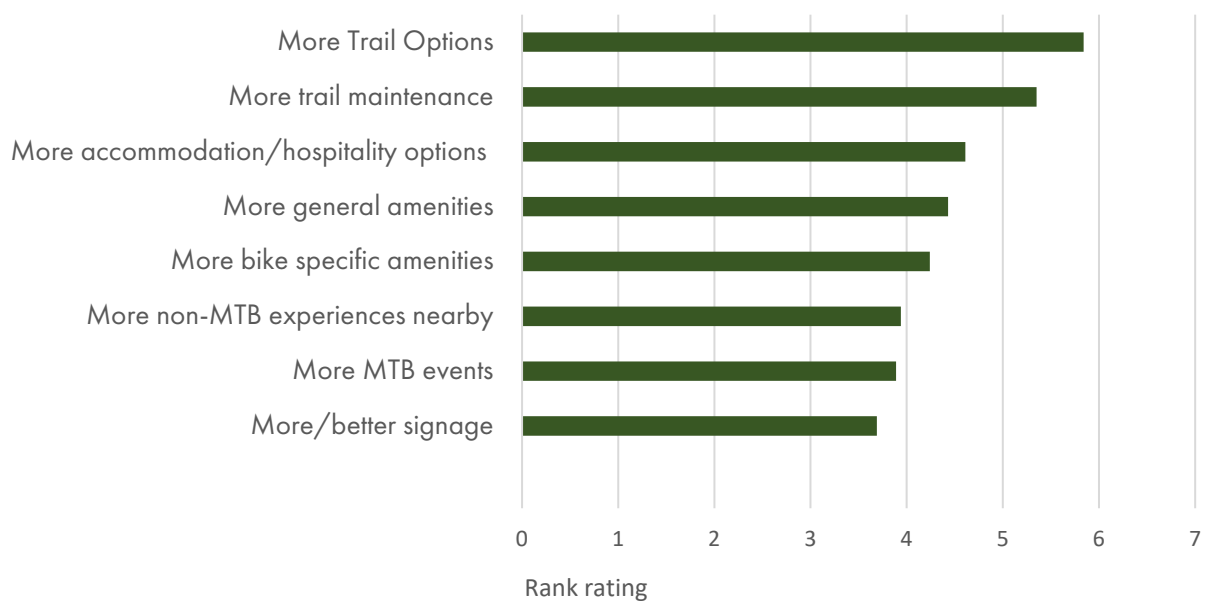


Figure 5. Which of the following improvements to this mountain biking destination would you value the most?



Providing further context around these priorities, riders were also asked about the MTB experience that made them want to go to the destination to ride. These provide more depth to the priorities mentioned above, and indicates other important aspects that riders identify without prompt:

### 1. Trail quality & variety

As already indicated, trail quality and variety is paramount to riders. The term 'World Class Trails' was repeatedly mentioned in responses, indicating that Tasmania has truly established itself on the global stage. 64% of respondents stated this was very important in their decision to ride at their chosen MTB destination. Trail diversity was also mentioned frequently, with riders getting value out of destinations having trails for their whole riding group – from beginner to advanced trails. 55% of respondents stated this was very important to them. Maintenance was frequently cited as a positive drawcard for some destinations (Derby), and an opportunity for future development (Maydena).

### 2. Destination appeal and scenery

The natural beauty and wilderness of the area was very important to 51% of respondents in their decision to ride there. Many commented on the unique blending of landscapes (temperate rainforest, coastal regions, sub-alpine terrain etc).

### 3. Accessibility and Infrastructure

Riders indicated that shuttle service/uplift options are important influences for mountain bikers in their decision to visit a destination. The convenience of a centralised destination (camping, food + drink options, shuttle options etc. all being in one destination) was often praised.

### 4. Family and Group Appeal

Many riders commented on the family friendly nature of a destination influencing their decision to ride there. This incorporates the ease and safety of camping/staying close to the trails, as

well as having a suitable range of trails for the entire family. Respondents also mentioned the benefit of having additional activities for non-MTB members of groups, and activities for riders having a day off.

### 5. Events

Not only do MTB events inject valuable dollars into the local economy, they are also a critical driver for building destination awareness and aspiration to visit. Many respondents commented on the positive influence of events on their decision to ride at a destination. Many visits have been catalysed by media exposure where YouTube and social media footage have built aspiration to visit. Red Bull Hardline, Enduro World Series and Tas Gravity Enduro are mentioned as motivators and catalysts for MTB trips to Tasmanian destinations. This points to the importance of continuing to push for mountain biking events in Tasmania, and the importance of having strong media coverage of these events.

### 6. Repeat visitation and loyalty

Many visitors, both intrastate and out-of-state, commented on the repeat visitation potential for Tasmanian MTB destinations, as there is much to explore. However, some commented on the need for more new trails to drive interest in discovery and exploration. This is an important consideration for Tasmania in the competitive climate of many new MTB experiences coming online in NSW, Queensland and Victoria.

### 7. Broader travel experience

For many respondents, mountain biking was the catalyst for a trip to Tasmania, and they commented on the suite of other ancillary offerings adjacent to the mountain biking component of their trip. The TVS indicates that people who engage in MTB on their trip are also more inclined to bushwalk and enjoy other adventure activities – as a critical mass of complementary activities drives visitation and provides competitive advantage over other destinations.

With such a strong nature-based brand, Tasmania has an advantage in this space, however competing with places particularly in New Zealand, there is still a need for investment in supporting nature-based and cultural activities. This also indicates the critical importance of facilitating cooperative marketing between MTB and other nature-based experiences.

## 8. Social & community atmosphere

Respondents commented on the community friendly atmosphere of Derby, and the engaging social base of Maydena as drawcards for visitation. MTB infrastructure that has been cleverly designed and developed should naturally funnel riders toward central points, which aid in developing this sought after atmosphere.

Data supporting these insights can be found in [Appendix 3](#).

### 5.1.2 Priorities for improvement

Drawing from the rider insights, this research has identified six main areas for improvement of the rider experience in Tasmania. These are:

#### 1. Trails & Maintenance

- Ongoing trail maintenance across all parks (Derby seen as a gold standard, Maydena/St Helens could benefit from improvement).
- More trails overall – new networks, extensions of existing ones, and greater diversity in terrain.
- Range of difficulty: more beginner/green and family-friendly trails, more intermediate flow trails, more advanced tech/black options.
- Desire for specialised features: hand-cut tech trails, wooden features, skills parks, dirt jump/pump track areas.
- Multi-day / bikepacking options with long-distance links and hut/camping infrastructure.

- Trail signage, mapping & safety – clearer maps, route suggestions, trailhead info, cultural/nature interpretation.

#### 2. Shuttles & Access

- More shuttles / less wait times – Maydena and St Helens called out for delays.
- Affordable options: family passes, multi-park shuttle passes, subsidised/free shuttle services.
- Better roads & infrastructure for shuttle vehicles; more trained drivers.
- Alternative uplift systems such as gondolas or cable shuttles. These options require pre-conditions such as appropriate elevation and terrain for construction and operation. They also need a robust business case supported by reliable and consistent demand to make the service financially viable.
- E-bike infrastructure: charging stations, bike washes.

#### 3. Accommodation & Facilities

- Camping options: affordable, organised/bookable sites near trailheads, with toilets, showers, kitchens, laundromats.
- Caravan/camper facilities close to parks.
- Family-friendly accommodation with children's facilities, playgrounds, pump tracks.
- More general accommodation capacity at peak times (especially Maydena, Derby).
- Non-rider amenities: grocery stores, cafes, food options, laundries, breweries.

#### 4. Community & Experience

- Support local businesses around trails (food, retail, guiding, hire).
- Events & programs: kids' clubs, coaching, mixed-race events, statewide downhill series, multi-sport events.
- Community hubs in Launceston, Hobart, Georgetown, Queenstown, Penguin – with better trail quality and hospitality.
- Cultural & nature storytelling integrated into trails (history, mining, forest interpretation).

- Better promotion & marketing: statewide campaigns, centralised website/app, itineraries, stronger branding of Tasmania as a MTB destination (not just Derby/Maydena).

## 5. Sustainability & Environment

- Protect surrounding forests – concerns about logging undermining trail/tourism appeal.
- Environmental infrastructure: shade trees, water refill points, rest areas, toilets.
- Balance trail expansion with quality and sustainability – “quality not just quantity.”

## 6. Travel & Access to Tasmania

- Flights & transport with bikes – airlines making bike transport difficult/expensive.
- Spirit of Tasmania: need easier and cheaper bike travel options.
- Rental vehicles with good bike racks need to be more available and affordable.

The rider perspective indicates that Tasmania’s future as a premier biking and outdoor destination depends on a holistic approach to infrastructure and visitor experience. Investment should focus on maintaining and diversifying the trail network to cater to a wide range of riders, while also ensuring reliable and affordable shuttle services that make access easy and convenient.

Enhancing camping grounds and creating more family-friendly facilities near trailheads will help broaden the appeal for groups and multi-day visitors. At the same time, supporting hospitality providers and local businesses can strengthen community involvement and create a richer visitor experience. A coordinated, statewide promotion strategy that connects different regions will encourage riders to explore beyond a single area, while improvements to transport and bike logistics—both for getting to Tasmania and traveling within it—will ensure seamless journeys from start to finish.

## 5.2 The industry perspective

The MTB tourism industry holds a unique understanding of the MTB market – their needs, how to connect with them, what they enjoy, what trends are emerging and how Tasmania is performing in the global, national and domestic MTB markets. These operators have significant investment in the MTB tourism industry and as such are well placed and motivated to provide robust advice aimed at improving the offering and the market appeal.

This section identifies some of the key priorities identified by the operators interviewed for this report.

**Decline in visitation.** A general consensus among operators was that mountain biking visitation is softening. This is considered partially to the flow of riders seeking offshore experiences after the confines of COVID, but also because of the significant investment in several mainland Australian based mountain biking destinations providing steep competition.

**Demand for e-bikes and supporting infrastructure.** Up to a third of shuttled bikes are now e-bikes, but infrastructure (charging stations, secure facilities) have struggled to keep pace. Operators all commented on the significant rise in demand for e-bike rentals from out-of-state visitors. This surge has escalated dramatically, and has not been met with a significant increase in e-bike infrastructure, such as secure charging stations.

“We’re seeing at least 25% - 33% of bikes on our [shuttle bus] trailer being e-bikes now.” - Tasmanian MTB Operator

**Capitalising on Tasmania’s natural assets.** Most operators commented on the importance of the unique and remarkable scenery and terrain Tasmania has for mountain biking, and indicated that the marketing efforts to promote the

destination do not adequately reflect the quality of Tasmania's offering.

### Wilderness trails as a core drawcard.

Tasmania's wilderness trails, especially signature rides like the Blue Tier and Bay of Fires, are major attractors for out-of-state riders. Operators see potential in developing a multi-day wilderness ride, similar to New Zealand's Old Ghost Road, to further cement Tasmania's reputation.

"Everyone coming to us from interstate and international will do the Blue Tier or Bay of Fires, or both. Derby would have struggled to take off without the Blue Tier. That trail generates the customer that comes back to Tassie year in, year out. It's those big rides that people want more of." - Tasmanian MTB operator.

**Events as catalysts.** Major events drive significant visitation by raising Tasmania's global MTB profile. Some operators commented on the significant influence major MTB events have had on their business receiving out-of-state visitors. Many of their guests have watched events such as the Enduro World Series and Red Bull Hardline on social media, Red Bull TV, and across other media forms, suggesting that broadcasting of a major event has been the catalyst for these visitors coming to Tasmania for a mountain biking trip.

"A major catalyst for our guests coming to us is the prestige given to Tasmanian MTB venues from large events like the EWS and Red Bull Hardline." - Tasmanian MTB Operator

**Trail maintenance expectations.** High-quality maintenance is essential for visitor satisfaction and word-of-mouth promotion.

Many operators stated that Tasmanian MTB trail maintenance is generally quite good, and this has a significant impact on word-of-mouth promotion of a destination. This has a downside however, lifting rider expectations for a high level of trail maintenance. To slow down on trail maintenance investment would be to risk damaging Tasmania's reputation as a high-quality mountain biking destination.

**Adventure tourism & town atmosphere.** Non-MTB adventure activities are vital for groups and mixed-interest visitors. The "buzz" of MTB towns like Derby is also seen as a critical part of the visitor experience, with potential to position them as broader adventure tourism hubs.

Several operators commented on the importance of having ancillary adventure tourism experiences adjacent to MTB destinations, so the non-riders in a group, or the rider wishing to take an afternoon off can still have unique and exciting experiences.

"We need to tap into the adventure market. We need to make Derby Australia's number one MTB destination, and then make it the adventure tourism capital of Australia." - Tasmanian MTB operator.

**Government & industry collaboration.** Operators recommend closer consultation with industry experts to ensure investments are targeted and effective. Past investments could have been better guided with local expertise.

"We need more adventure tourism minded people in government, or proper consultation with industry professionals. Tasmania has world leading experts in this area, and their insights are so valuable. Yet those insights aren't tapped into." - Tasmanian MTB Operator.

**Access & logistics.** Better international access (direct flights) is needed to attract high-yield global visitors. Operators stress the need to “get the ball rolling” even if progress is long-term.

## 5.2.1 Competition & MTB market positioning

The industry identified significant emerging competition, particularly from Warburton (Victoria), New Zealand destinations (e.g., Queenstown), and other Australian trail networks (Mogo was frequently cited). While Derby and Maydena retain strong reputations, there is a consensus among MTB operators that Tasmania must continue investing in both product quality and marketing to stay competitive.

The unique appeal of Tasmanian landscapes and the high-quality experience were noted as key competitive advantages, but concerns were raised about complacency.

“Our biggest competition is New Zealand. They have similar terrain, but they’re investing heavily and marketing even harder” - Tasmanian MTB Operator

Some operators spoke of the remarkable quality of Tasmania’s MTB offerings, but considered the marketing efforts to promote these offerings to other markets to be inconsistent and often focused on a few key trails that have been marketed in a similar way for several years (Detonate (Double Black) & Return to Sender (Blue), Blue Derby, were used as examples). It was suggested that old, or lesser used trails could have marketing efforts reignited and promoted as if they were new trails, without the investment required to build a new trail. Black Dragon (double black) and Dambusters (Blue), Blue Derby were used as this example, as an equivalent trail to Detonate and Return to Sender, respectively.

**Adventure tourism.** Many operators commented on Tasmania’s lack of nearby ancillary adventure tourism offerings. An example was given of Whistler, Canada, which has 4WD tours, ziplining, sightseeing tours, unique / scenic dining options etc. For a non-mountain biker, or a mountain biker taking a day off riding, there is much to do and see. This is key in attracting families, and larger groups of friends, and keeping them in region for several days, as stated by operators. Tasmania has high potential for development of these ancillary offerings, yet the market remains untapped. This identified the need for work to close the gap between where Tasmania’s adventure tourism reputation is, and where it should be, given the current offerings.

**Marketing & promotion needs.** Despite world-class terrain, operators indicated that Tasmania’s marketing hasn’t matched the quality of the product.

“We’ve got the sponge cake with all the right ingredients. It just needs to be iced and covered in sprinkles.” - Tasmanian MTB Operator

Stakeholders also mention that Tasmania’s unique offerings are remarkable – yet the marketing efforts to promote these are sub-par, when compared with other destinations such as New Zealand, and other out-of-state tourism destinations. Stronger, more strategic promotion is needed to:

- Highlight Tasmania’s unique terrain and big-ticket rides.
- Spread demand across lesser-known trails to ease pressure on signature routes.
- Provide a clear online planning hub to help visitors plan trips.

**Lack of accessible information.** Several operators noted that they field a high volume of phone calls from prospective out-of-state

mountain bikers who are eager to undertake a mountain biking trip to Tasmania, yet struggle to figure out what their trip should look like, or how they should structure it due to a lack of centralised, objective information to help guide them.

Compared to other destinations, largely in New Zealand and NSW, Tasmania is underperforming in getting key information to the right demographics. At destination, operators still report many riders questioning them on how to operate shuttle services, where amenities are, how the trail system works etc. Centralised information points are essential to communicate this information en masse, and Tasmanian MTB destinations are underperforming, as stated by MTB operators and visiting riders.

**Meeting Health Trend Expectations.** Several operators mentioned complaints/comments from out-of-state visitors who are increasingly health conscious consumers, regarding the lack of healthy food options in mountain biking towns. As populations become ever more health conscious, Tasmania needs to be aware of meeting this demand in order to retain the health-conscious mountain bike visitor.

**Lack of Public/Private Consultation.** Some operators mentioned the need for better collaboration between government and private industry professionals. Tasmania's MTB operators have personally and heavily invested in the industry and are deeply attached to its success. They deal first-hand with the market and are knowledgeable about language, trends, channels of communication, influencers and the pitfalls of getting these wrong. Engaging with these professionals to guide funding decisions and investments is critical, yet little engagement occurs when decisions are made about MTB infrastructure and marketing.

The industry perspective supports the rider perspective, and adds further dimensions to consider for developing Tasmania's MTB tourism

industry. This section indicates the need to prioritise marketing and trip-planning support, ensuring visitors can easily discover and navigate the state's world-class trails; to invest in e-bike infrastructure to keep pace with surging demand; and to protect and enhance signature wilderness experiences like the Blue Tier and Bay of Fires while progressing a new multi-day wilderness ride to cement Tasmania's global appeal. These steps will help cement Tasmania's competitive edge against mainland destinations and maintain its reputation as a premier mountain biking destination.

### 5.3 The manager perspective

Interviews with trail managers (ranging from trail builders to MTB destination foundations) echo operator priorities around trail maintenance, marketing and building on Tasmania's assets, but with a sharper focus on rail trail activation, data-driven investment, and building global expertise in MTB trail construction, alongside developing an iconic wilderness ride.

**Wilderness experiences.** A new multi-day wilderness trail, styled on New Zealand's Old Ghost Road, is seen as a major opportunity to attract international and interstate riders who have not yet been compelled enough to visit Tasmania.

Managers comment on the unique appeal of wilderness trails, and comment that a cleverly designed and implemented 'Old Ghost Road' styled multi-day wilderness trail would perform as a major catalyst for new out-of-state mountain biking visitation from riders that may have only ever ridden on MTB trips in New Zealand, or haven't been compelled enough to visit Tasmania for mountain biking.

"It's the big rides that people want more of. Blue Tier generates the customer that comes back to Tassie year in, year out." –  
Tasmanian MTB Operator

**Rail trail opportunities.** Tasmania's rail trail network is high quality but under-recognised. With modest activation, supporting infrastructure, and promotion, it could unlock a significant new visitor market—similar to New Zealand's thriving rail trail sector.

Managers were more conscious of the high quality rail trail offerings within Tasmania, and suggested that with a little activation work, these rail trails could be better tapped into to attract a whole new market of out-of-state mountain bikers.

Tasmania's rail trail market won't take a lot to activate. They're hardly marketed, but are a really high-quality offering. The rail trail market in New Zealand is huge, and Tasmania can tap into that market too -  
Tasmanian MTB manager

**Government consultation & data.** Stronger consultation with industry experts and improved visitor data collection (e.g. geotracking, behaviour research) are critical to ensure state and federal investment achieves maximum impact.

Managers noted the need for better data collection and monitoring, so accurate data can continue to best inform future mountain biking related investments. Coupling this with professional industry expert consultations will ensure that each dollar of investment into mountain biking achieves a significant impact.

We need to make sure we get data that can help inform future investments -  
Tasmanian MTB manager.

**Trail building expertise & training.** Tasmania has potential to position itself as a global leader in MTB trail construction by developing a dedicated trail building TAFE course, ensuring the next generation of trail builders are trained to create world-class, environmentally sensitive

trails. Whilst there may not be jobs in Tasmania for all graduates, there exists significant potential to develop as a global skills hub that can provide opportunities for new trail development and attract more track builders, who are inevitably MTB riders as well.

"If you want to be a watch making expert, you go to Switzerland. If you want to become a MTB trail building expert, you should come to Tasmania" - Tasmanian MTB manager

## 6 Comparative benchmarking

Comparatively speaking, Tasmania's MTB experiences currently hold a secure place in the hearts of many mountain bikers. Awarded Trail of the Year through the Enduro World Series in 2017 and 2019, Blue Derby in particular has been celebrated on the world stage. Six years on however, there are many other destinations recently opened or soon to open, particularly in Australia, to challenge the supremacy of the Tasmanian MTB experience.

Whilst Survey 2 in this research yielded a low response rate and is not used for statistical insight, the data did provide the opportunity to understand the perspective of a small group of riders predominantly based in NSW, much like a focus group. This survey presented the following comparative set for consideration:

- TAS - Blue Derby
- NSW - Thredbo
- WA - Dwellingup
- NSW - Narooma
- NSW - Eden
- VIC - Omeo
- NZ - Queenstown
- NZ - Old Ghost Rd
- Canada - Whistler
- TAS - Maydena
- WA - Nannup
- QLD - Cairns
- NSW - Mogo
- VIC - Bright
- VIC - Falls Creek
- NZ - Rotorua
- NZ - Heaphy Track

Of the 27 respondents to this question, 11 indicated that they hadn't been to Maydena but would like to go, behind Falls Creek, Omeo and Old Ghost Rd. 6 indicated they hadn't been to Blue Derby but would like to go. Alternatively, of those trails they had ridden and would ride again, Blue Derby fell behind Thredbo and Mogo, with Maydena in the middle of the pack. Although this question doesn't rate the destinations, it does show that Derby and Maydena are both considered as part of a

broader consideration set within Australia and internationally, but more strategic marketing work must take place to bring attention to these destinations.

Similarly many industry and local government trail managers identified Mogo and Warburton as new experiences that will directly compete with Tasmania.

When asked how important certain factors are in deciding where to travel to ride, most important was the quality of the trails (4.70 out of 5), followed closely by the natural environment (4.56) and range of trail options (4.11). [Figure 6](#) shows the full suite of comparative factors and their relative importance in choosing an MTB destination, and [Figure 7](#) shows the types of trails that influence destination choice.

### Demand for wilderness trails in Tasmania

A report by the Yarra Ranges Council and TRC Tourism in 2021 found that 56% of survey respondents indicated they had ridden or intended to ride either the Blue Tier or Bay of Fires wilderness trails on their visit.<sup>26</sup> This finding is consistent with interviews from this report with shuttle operators in Derby and guided tour operators who state that over half of their guests are eager to ride either the Blue Tier or Bay of Fires trail.

37% of visitors indicated that completing one of the two trails was the main driver for their visit and for 20% it was the whole reason for their visit. 76% of those riders said they would stay fewer nights if those trails did not exist. These insights indicate that wilderness trails such as Blue Tier and Bay of Fires are critical drivers for MTB tourism visitation.

<sup>26</sup> A wilderness trail is defined as a long trail through wilderness, often from one point to another, as opposed to a trail park with many different trails.

Figure 6. Comparative importance of factors influencing MTB travel destinations rated out of 5.

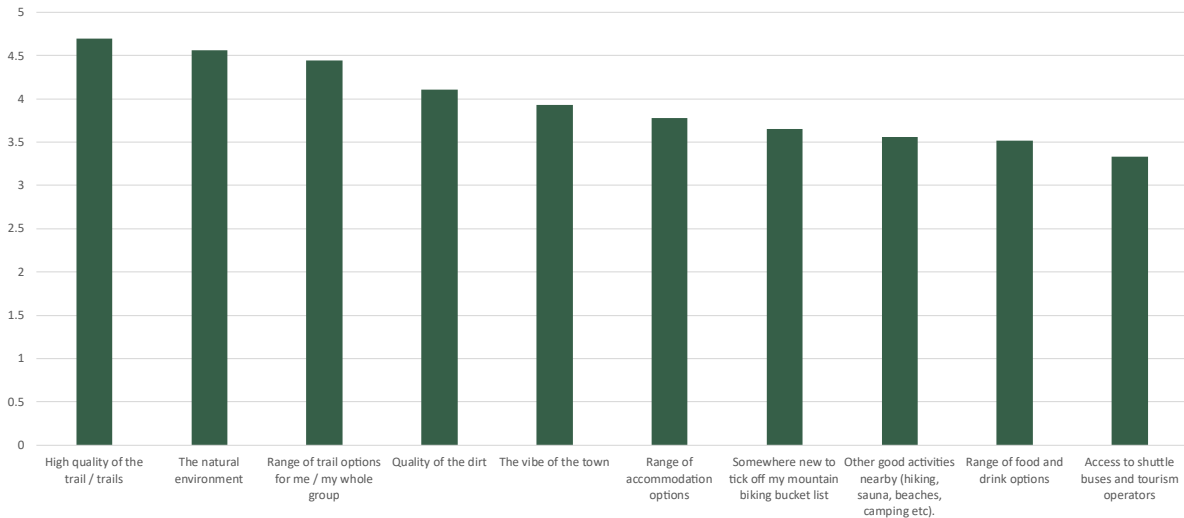
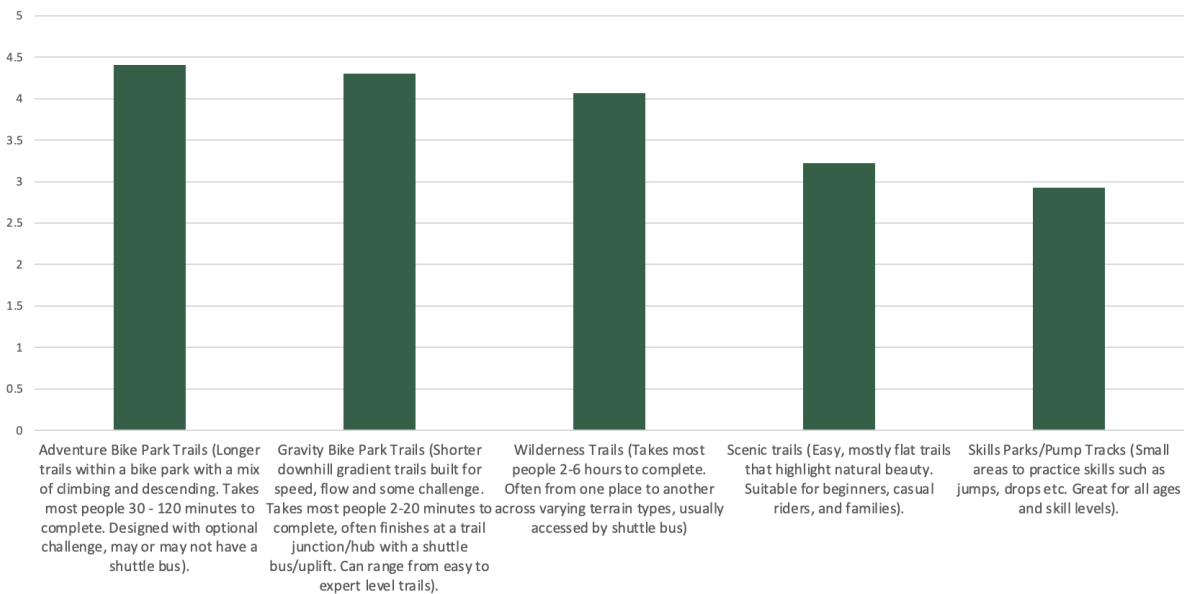


Figure 7. Types of trails that influence MTB destination choice, rated out of 5



“If we [Tasmania] lose a customer, it’s because we’ve failed to attract/keep them, not because someone else has done better.” – Tasmanian MTB Operator

This quote highlights that Tasmania has a unique and high quality mountain biking trail offering. Contextually, the operator is stating that mountain biking visitors should be coming to Tasmania first as a mountain biking destination. If they choose to ride elsewhere in Australia, it is likely because a different destination is marketing better, or has ‘better’ MTB adjacent offerings. By adopting the recommendations provided in this report, Tasmania can better retain interstate visitors.

## 6.1 International benchmarking

Understanding how Tasmania's iconic MTB destinations are performing compared with competitors in other parts of the world can help identify areas of potential improvement. The following examples identify high performing MTB destinations and attempt to make a comparison on performance, subject to data availability.



# Queenstown Bike Park

South Island, New Zealand



Credit: Destination Queenstown

Around Queenstown and surrounds there are four major mountain biking trail networks, and Queenstown Bike Park is at the centre of these. Mountain biking holidaymakers to Queenstown spend around 5% more than the average visitor to the area. Figures in this report show that Tasmania has a spend of ~25% - 100% higher than a non-MTB visitor.

The comparison in the below table shows that the sheer volume of visitors travelling to Queenstown has an impact on the numbers participating in MTB. Added to this is the close proximity of an international airport and the chairlift servicing the park.

Whilst Tasmanian MTB destinations may not aspire to reach the volume of visitation experienced by Queenstown, this example shows that in a brand aligned, adventure destination with growing visitor

numbers and strong supporting infrastructure, brand and marketing, it is possible to grow the value of MTB tourism considerably.

It should be noted that the visitation and spend estimates for Queenstown are representative of every visitor to Queenstown that rides a bike at some stage on their visit. This includes riding along lake trails, and is not exclusively visitation and spend in the Queenstown mountain bike park.

Table 15. Comparison of Queenstown Lakes and Maydena Bike Park<sup>27</sup>

Comparison	Queenstown Lakes	Maydena Bike Park			
	Accessibility	Chairlift & Pedal	Shuttle Bus & Pedal Access		
Gravity assisted trail access	~30km	100+km			
Elevation Drop	~450m	~820m			
Estimated annual visits	176,634 visitors <sup>28</sup>	<b>Total</b>	<b>International</b>	<b>Interstate</b>	<b>Intrastate</b>
	5,313 residents	30,000	2,202	13,486	14,312
Per Visit Expenditure (Visiting Individuals) (AUD, 2025)	\$915	<b>International</b>	<b>Interstate</b>	<b>Intrastate</b>	
		\$4,214 (total trip)	\$3,837 (total trip)	\$435 (total trip)	
		\$3,913 (MTB attributed)	\$3,071 (MTB Attributed)	\$386 (MTB Attributed)	
Direct Jobs Supported	301	<b>TSA Estimate</b>			
		135.7			
Indirect Jobs Supported *	505	<b>TSA Estimate</b>			
		105.1			
Induced Jobs Supported	13.3	Induced jobs included in TSA Indirect jobs estimate			
Total Expenditure (AUD, 2025)	\$174.2m	\$60,169,236 (Total trip spend)			
		\$49,816,94 (MTB attributed Spend)			

Queenstown shows how the combination of brand strength, international accessibility, and clever mountain biking and supporting service infrastructure can amplify the value of mountain biking within an adventure tourism destination.

While Tasmania may not seek to match the sheer scale of Queenstown’s visitor numbers, the lesson is in how mountain biking has been embedded as part of a broader destination identity—supported by easy access, diversified trail experiences, and strong marketing. Queenstown offers mountain biking as a compelling offering to Queenstown based visitors from an introductory to expert level, which increases spend and stay in the region.

For Tasmania, this underscores the opportunity to leverage its natural assets and existing MTB credibility through brand alignment, improved accessibility, and strategic promotion, thereby growing both the value and visibility of MTB tourism and adventure tourism alike.

<sup>27</sup> Patterson, 2022

<sup>28</sup> Visitation figures represent mountain bikers to the Queenstown Lakes Region - not just the Queenstown MTB Park.



## Rotorua

North Island, New Zealand



Credit: Ashwell Palmer, MTB Project

Rotorua is a major competitor for Derby. Within easy reach of the major markets in Australian and New Zealand cities, the region has established itself as a premier international mountain biking destination, and has significant supporting tourism attractions including geothermal springs and cultural attractions nearby. In 2019, the International Mountain Biking Association (IMBA) renewed its gold-level Ride Centre™ designation—IMBA’s highest accolade for mountain biking destinations worldwide. Central to Rotorua’s appeal is the extensive trail network within Whakarewarewa Forest, offering approximately 200 kilometres of purpose-built tracks. These trails cater to a wide spectrum of riders, from novices to elite downhill competitors, and accommodate all ages and fitness levels.

Beyond Whakarewarewa, Rotorua boasts additional riding experiences at locations such as Skyline MTB Park, Rainbow Mountain, Moerangi Track, Western Okataina Walkway, the Timber Trail, and Whirinaki Forest Trails. Critical to Rotorua’s success has been the critical mass of supporting tourism product and the high accommodation capacity.

The region also hosts the globally renowned Crankworx festival, which attracts top-tier riders from around the world to compete in downhill and freestyle events on Mt Ngongotahā, further cementing Rotorua’s

reputation as a hub for mountain biking excellence. The Rotorua Lakes Council provides \$250,000 each year from 2022 to 2027, and the NZ government allocates \$1 million to the event annually. Crankworx contributes around \$4.3million to the local economy and generates millions of broadcast views when it is held. This represents a return of \$3.44 to every dollar invested in the event, as well as significant value in brand awareness and media coverage.

Table 16. Comparison of Rotorua MTB and Derby

Comparison	Rotorua Lakes	Blue Derby			
	Accessibility	Shuttle Bus & Pedal Access	Shuttle Bus & Pedal Access		
Gravity assisted trail access	220km	125km			
Elevation Drop	514m	~400m			
Estimated annual visits	148,597 visitors	<b>Total</b> 45,000	<b>International</b> 2,274	<b>Interstate</b> 8,474	<b>Intrastate</b> 44,762
Per Visit Expenditure (Visiting Individuals) (AUD)	\$970.71	<b>International</b>	<b>Interstate</b>	<b>Intrastate</b>	
		\$5,134.76 (total trip)	\$3,931.91 (total trip)	\$647.94 (total trip)	
		\$3,823.43 (MTB attributed)	\$2,992.01 (MTB Attributed)	\$555.91 (MTB Attributed)	
Direct Jobs Supported	384	<b>TSA Estimate</b> 159.4			
Indirect Jobs Supported*	769	<b>TSA Estimate</b> 115			
Total Spend (AUD, 2025)	\$139.8m	\$50.9m			

Rotorua’s success demonstrates the value of combining a large, diverse trail network with a critical mass of complementary tourism offerings. Its 200+ km of purpose-built tracks provides a plethora of options for every rider type, while the integration of natural attractions, cultural experiences, and strong supporting infrastructure ensures that visitors extend their stays and spend more locally.

For Tasmania to remain competitive with international destinations like Rotorua, investment must include holistic visitor experiences, seamless access, and year-round adventure tourism products that encourages riders and their families to view the state as a complete mountain biking destination. Rotorua has successfully established a reputation as an adventure tourism destination, and has the supporting infrastructure to host peak season booms of visitation. With >100,000 more mountain biking visitors than Blue Derby each year, Blue Derby can learn a lot from Rotorua around destination branding and development of supporting infrastructure.



## Old Ghost Road

South Island, New Zealand



Credit: Becky Norman and Sam Rice

“The Old Ghost Road is the longest singletrack ride in New Zealand, and the best. The trail winds through dense native bush, and rocky high alpine on good bench-cut and machine built tread. It’s fantastic backcountry riding, made accessible for intermediate mountain bikers.” - Montana Miller, 2025.

The Old Ghost road has received international attention since its development as a multi-day (2-3 day) mountain biking trail. It is a point-to-point 85km singletrack ride with 2,741m of ascent. In 2018, the trail was covered by over 12,400 people. Two-thirds of these were mountain bikers (the remainder being hikers). It is estimated visitation currently sits between 12,000-14,000 people per year ([Ombler, 2019](#)). This hut-to-hut styled trail is akin to Tasmania’s iconic Overland Track, but primarily for mountain bikers.

A flat multi-day fee is charged per rider of \$160 NZD per person (sleeping in huts), and \$50 per booking for tent sites (camping) for up to two people ([Old Ghost Road, 2025](#)). A private summer sleep out for four

people can also be booked for \$360 per booking. Although spend figures are not publicly available, the below revenue calculations have been made.

Table 17. Old Ghost Road Booking Revenue

Visitors per year 13,000		NZD:AUD 0.91		
Pricing		Estimated % of total	NZD total	AUD total
Private Summer Sleep Out per booking	\$360	5%	\$234,000	\$212,940
Hut fee per rider	\$160	70%	\$1,456,000	\$1,324,960
Tent fee per booking	\$50	15%	\$97,500	\$88,725
<b>Total -</b>		<b>90%*</b>	<b>\$1,787,500</b>	<b>\$1,626,625</b>

\* Only 90% of visitors have been included in these calculations to account for those included in group bookings that do not incur a spend.

As shown, the Old Ghost Road generates significant economic impact through hut bookings alone. This highlights a clear opportunity for Tasmania to explore a similar revenue model to help fund a multi-day wilderness mountain biking experience.

The Old Ghost Road generates an estimated \$1.63m annually in booking fee revenue, excluding transfers, food, and other spending. Tasmania’s landscapes, favourable weather in many regions, and established MTB offerings suggest a similar long-distance trail would be well suited. Despite receiving 2000mm+ rainfall annually, demand for the Old Ghost Road remains strong – indicating Tasmania’s comparatively drier conditions could attract an even broader rider base.

Tasmanian MTB operators consistently note the enthusiasm their guests show for trails such as the Blue Tier and Bay of Fires. They anticipate that a multi-day equivalent would generate similar levels of excitement and demand. This presents a significant opportunity for Tasmania to expand its MTB portfolio and capture a larger share of the adventure-oriented mountain biking market. This opportunity is in alignment with the Tasmanian Mountain Bike Tourism Action Plan 2024.

“The demand for the Blue Tier and Bay of Fires trail from our guests is massive! Nearly 50% come just for them. Our guests want more of this style of trail, and show interest in trails like Old Ghost Road” - Tasmanian MTB Operator

“Fully immersive wilderness experiences on an adventure trail, like on Blue Tier & Bay of Fires, is what people talk about, to the point of telling strangers about their experience. People want another ‘stick in your mind for your whole life’ wilderness trail. But it must be linked to an already prominent network to leverage existing MTB infrastructure” – Tasmanian MTB Manager



## Crested Butte Colorado, USA



Credit: Zach Dischner

A recent study highlights the economic impact of mountain biking in USA<sup>29</sup>, with Crested Butte, Colorado used here as a comparison to Maydena Bike Park. Figures are shown in AUD and adjusted for inflation from the original 2018 study.

While primarily a winter ski town, Crested Butte has fostered a strong MTB culture since 1983 through the Crested Butte Mountain Bike Association (CBMBA), considered the world's oldest mountain bike club.<sup>30</sup> In 2025, the CBMBA had a board of directors with 14 members, five full time staff, and a team of committed volunteers.<sup>31</sup>

Although only 48km of chairlift assisted singletrack is accessible, there is over 700km of pedal access only singletrack stemming out from the town of Crested Butte. This attracts a broad range of trail users.

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<sup>29</sup> Clinton, 2024

<sup>30</sup> [Shirbach](#), 2020

<sup>31</sup> [Crested Butte Mountain Bike](#), 2025

Notably, Crested Butte benefits from a steady influx of riders who relocate permanently, creating long-term economic and community impacts. The township recorded 1,658 residents in 2023.<sup>32</sup>

Table 18. Comparison of Crested Butte and Maydena Bike Park

Comparison	Crested Butte	Maydena Bike Park			
	Accessibility	2x Chairlifts	Shuttle uplift		
Gravity assisted trail access	48km	100+km			
Elevation Drop	849m	820m			
Estimated annual visits	37,583 visitors (+16,107 residents)	<b>Total</b> 30,000	<b>International</b> 2,202	<b>Interstate</b> 13,486	<b>Intrastate</b> 14,312
Per Visit Expenditure (Visiting Individuals) (AUD)	\$937.90	<b>International</b>	<b>Interstate</b>	<b>Intrastate</b>	
		\$4,214.29 (total trip)	\$3,837.21 (total trip)	\$435.10 (total trip)	
		\$3,913.27 (MTB spend attributed to trip)	\$3,071.47 (MTB spend attributed to trip)	\$386.29 (MTB spend attributed to trip)	
Direct Jobs Supported	137.3	<b>Peak Season *</b>	<b>Off Peak *</b>	<b>TSA Estimate</b>	
		75	10	135.7	
Indirect Jobs Supported*	13.7	<b>MBP Estimate *</b>		<b>TSA Estimate</b>	
		≥10		105.1	
Induced Jobs Supported	16.5	Induced jobs included in TSA Indirect jobs estimate			
Total Value Added (AUD, 2025)	\$14,277,188	\$28,100,000			

\*Employment figures listed for MBP are real and current bike park only jobs. TSA estimate shows likely FTE that *could* be supported, given direct spend.

This comparison highlights that while Maydena Bike Park already surpasses Crested Butte in trail length and total economic value added, its reliance on shuttle uplift limits overall visitation and growth potential. Crested Butte demonstrates how chairlift infrastructure can dramatically expand carrying capacity, with an estimated 20,000+ more visitors per year than Maydena Bike Park.

For Maydena and Tasmania more broadly, the lesson is clear: investment in major MTB attributed infrastructure, such as lift-assisted access, could unlock substantial new economic and tourism benefits, positioning the state to compete directly with leading international destinations while meeting the expectations of high-yield adventure travellers. Exploring the suitability of lift-accessed developments within Tasmania is beyond the scope of this report. As such, no recommendation has been made regarding lift accessed MTB terrain. Future research into this area is encouraged.

<sup>32</sup> [World Population Review](#), 2023

## 6.2 International Event Case Study



# Crankworx Whistler 2023

Whistler, Canada



Credit: Chris Pilling

Crankworx Whistler is widely regarded as the world's premier mountain biking festival, celebrated for its elite competition and global prestige. Since its inception in 2004, the event has delivered substantial economic impact, driven by high visitor expenditure and extensive international media exposure.

The festival underscores the social nature of mountain biking and the capacity of globally recognised events to attract large numbers of high-yield visitors. Spectators are drawn to the high calibre of competition, as well as the immersive, MTB-focused festival atmosphere the event creates.

While Tasmania does not possess a purpose-built resort village comparable to Whistler, its unique and iconic landscapes present an opportunity to host events that are equally distinctive, yet tailored to the state's strengths. As one operator noted: *"Tasmania will never become a Whistler. But Whistler will never become Tasmania."* Tasmania has already demonstrated its ability to deliver world-class spectacles, such as Red Bull Hardline, which has significantly raised the state's international profile. Building on this momentum, Tasmania has the potential to host further globally recognised events that showcase its trails, as well as attracting mountain bikers from around the world.

Table 19. Key statistics from the Crankworx Whistler 2023 event

Element	CrankWorx Whistler 2023*	
Jobs Supported	586 (total) 523 (in Whistler)	
Total Attendance	304,460 (over ten days)	
Out-of-Town visitors	92,139	
% of attendees from out of region	61%	
% of international visitors	21.8% (Excluding US) 45.5% (Including US)	
Average length of stay	5.2 days	
Event influenced decision to come	76%	
Event was key reason to come	51%	
Regional/Municipality investment (AUD, 2025)	\$175,638	
State/Province investment (AUD, 2025)	<b>BC Province Tourism &amp; Events*</b>	<b>BC Festivals, Fairs &amp; Events Fund*</b>
	\$173,327	\$288,878
Visitor Spending in Whistler (AUD, 2025)	\$58,584,357	
Average spend per party (AUD, 2025)	\$1,917	
Event Participation (Across all categories)	1,300 Individuals	
Event volunteers	>500	
Broadcast reach	1.3 million views	
Top viewing countries	US, Canada, UK, Germany, Australia	

\*Inflation & exchange rate adjusted to 2025 AUD

(Crankworx, [2023](#))

Crankworx Whistler demonstrates the economic importance of major MTB events in generating high visitation, high-yield visitors, and global exposure. Its 1.3 million broadcast views translate to 1.3 million potential visitors becoming aware of Whistler as a premium MTB destination, reinforcing its reputation as a hub for rider progression and MTB culture. The BC Government’s \$450,000 grant further underscores the recognised value of such events, and signals confidence in the event and its associated activities to private industry, inviting further investment.

Over the past three years, Crankworx Cairns (Australia) has delivered \$19.5 million in economic impact, 67,000 room nights, 23,644 attendees, and 1.9 million broadcast views, while Crankworx Rotorua (New Zealand) continues to attract thousands of visitors and millions of viewers annually.

Together, these examples highlight the power of MTB events to attract high-yield visitors and global audiences. Having proven its capability with Red Bull Hardline, Tasmania now has the opportunity to build on this momentum and secure a stronger presence on the international MTB event calendar. However, MTB events must be carefully chosen to ensure they are the right fit for the right destination at the right time. Further work should be done to assess event suitability in Tasmania.

### 6.3 Local Event Case Study



## Red Bull Hardline 2025

Maydena, Tasmania



Credit: Red Bull, 2025

Red Bull Hardline is a major international event with an 11 year history in Wales, UK. It is generally regarded as the world's most challenging downhill mountain bike course, and has attracted major in-person crowds, as well as significant online viewership.

In February 2024, Maydena Bike Park (MBP) held the first ever Hardline outside of Wales. It was again held at MBP in 2025 and is due to be held at MBP in 2026. The 2025 event attracted over 6,000 in-person spectators each day for the two days of the event. 25% of these spectators were from interstate and international destinations, and 75% of spectators were intrastate spectators. The event also had 200 event crew (athletes, staff, volunteers) for the seven days surrounding the event.

The economic impact of the event cannot be fully evaluated due to a lack of insight on primary purpose of travel. However data provided by the organisers indicates that over the two days of Red Bull Hardline in 2025, the spend from spectators, competitors and crew is estimated at around \$3.50m, from 6,914 people, with an estimated 18,897 bed nights.

Gravity Fest, a fixed program run over five days in the same week as Red Bull Hardline, had an estimated event spend of \$616k, from 247 attendees, with an estimated 1,235 bed nights. Together, the total estimated spend from Red Bull Hardline and Gravity Fest visitation is estimated to be \$4.16m.

The total spend from all people attending Red Bull Hardline (including outside the event dates from interstate & international visitors that would have been unlikely to occur if it were not for Hardline being the catalyst for their trip to Tasmania), is estimated at \$7.0m. The recorded spend includes food and beverage, accommodation, transport while in Tasmania, spectator & competitor tickets and other experiences while in the state.

Based on these estimations, the total value added for Red Bull Hardline could be up to \$2m, whilst Gravity Fest could be up to \$300,000. In terms of the total trip expenditure for Red Bull Hardline this could be up to \$3.9m.<sup>33</sup>

More research is needed to fully evaluate the impact of the Red Bull Hardline event, however these indications suggest a significant economic impact.

This event exemplifies Tasmania's ability to attract world class events with impactful outcomes.

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<sup>33</sup> These figures are estimates only. No primary data was collected throughout Red Bull Hardline nor Gravity Fest to accurately measure spectator, competitor or crew spending behaviours. The figures presented have been calculated using the best data available at the time, and should be used as an estimate only.

## 7 Looking forward

In recent years, Tasmania has established itself as a premier mountain biking destination, gaining international acclaim through word-of-mouth, destination appeal, and the successful hosting of globally recognised events such as the Enduro World Series in Derby (2017 and 2018), the Enduro World Cup in Derby and Maydena (2023), and Red Bull Hardline (2024–2026). These events have significantly contributed to Tasmania's profile among mountain biking enthusiasts, particularly those from mainland Australia.

Mountain bike tourism growth in Tasmania has traditionally been strong, but is beginning to plateau. The state relies heavily on the Victorian and NSW markets, and the novelty and exclusivity that once defined Tasmania's trails are increasingly being challenged by the emergence of new mountain biking networks such as Mogo and Warburton. These new facilities are attracting attention from mainland-based mountain bikers by offering convenience, lower costs, and similar experiences closer to home.

"There are people sitting in their Melbourne city offices right now that have hardly even heard of mountain biking. In 12 months' time, they'll be riding their own mountain bike in Warburton and loving it. The more people ride, the more they will travel to ride. People will always go to iconic destinations, and Tasmania needs to continuously polish its brand to stay iconic, always". – Tasmanian MTB Manager

Without proactive intervention, Tasmania risks losing its competitive edge. There is a very real possibility that riders from key source markets such as Melbourne will choose more accessible mainland options over the added expense and logistical complexity of travel to Tasmania.

Conversely, there is a clear opportunity to defend and elevate Tasmania's position as a world-class mountain biking and adventure tourism destination. This involves a unified, statewide approach focused on:

1. **Distinctive trail experiences.** Developing and maintaining trail types that mainland competitors cannot replicate—trails that offer immersive, journey-based experiences that create lifelong memories.
2. **Destination branding and marketing alignment.** Strengthening Tasmania's identity as a globally unique, adventure-driven destination through coordinated marketing across regions and stakeholders.
3. **International event hosting.** Securing additional high-profile international events to sustain and enhance Tasmania's profile on the global mountain biking stage. Accurate capture of event related data should accompany this.
4. **Improved accessibility.** Advocating for expanded direct air routes, including increased services from New Zealand and new links from priority growth markets such as Singapore and Dubai.
5. **Maintenance and infrastructure excellence.** Ensuring Tasmania's trail networks remain among the best-maintained in the world, reinforcing its reputation for quality and reliability.

By doubling down on what sets Tasmania apart, creating trail and visitor experiences that are truly inimitable, and maintaining a standard that competitors cannot match, Tasmania can retain—and grow—its status as one of, if not *the* world's premier mountain biking destination.

## 7.1 Scenarios

Working to improve the experience quality and diversity is critical to ensuring the future of MTB tourism in Tasmania. Based on the findings from this report, three scenarios are emerging, with very different outcomes for the state, visitors and the industry. These scenarios have been developed based on data trends, survey responses, out-of-state mountain biking market developments, and predictions from 11 interviewed MTB operators and industry representatives who are seeing changes in the MTB industry occurring firsthand.



### Scenario 1. Watch and observe.

Nothing is done to defend against interstate MTB destination competitors.

In this scenario, visitation decreases 3% year-on-year for the first five years, as 'Tasmania's out-of-state visitors' ride more frequently at new mainland-based destinations such as Mogo and Warburton. After 5 years, it is expected more of 'Tasmania's out-of-state visitors' will recognise the inherent natural wilderness value and unique characteristics Tasmania offers that are lacking in equivalent quality elsewhere. However, the accessibility of mainland-based destinations will still be a major draw to 'Tasmania's out-of-state visitors', hence, annual visitation reduction is still present, but is reduced to a 1% decrease per year.



### Scenario 2. Defend

Some recommendations are implemented to defend against mainland competitors. No major new infrastructure projects.

Due to the novelty and appeal of new, accessible trail networks opening such as Mogo and Warburton, it is expected that a share of 'Tasmania's out-of-state visitors' will likely use their holiday periods to undertake a mountain biking trip in these destinations instead. However, once several recommendations from this report and the Mountain Bike Tourism Action Plan – 2024 are implemented, it is expected Tasmania will begin recovering this share of riders, and an annual increase of 2.5% is seen from 2028/29 onwards.



### Scenario 3. Defend & Elevate

All recommendations are implemented, and Tasmania aggressively pursues a stronger position in interstate & international markets.

It may be unlikely Tasmania receives an increase in out-of-state mountain biking visitation over the coming season, as Tasmania's out-of-state mountain biking visitors instead take mountain biking trips at the new mainland-based destinations such as Mogo and Warburton. During this time, construction of a new iconic wilderness trail may be underway, and other recommendations from this report and the Mountain Bike Tourism Action Plan – 2024 are implemented. Upon opening of this new trail, and maturation of other implemented recommendations in ~2028/29, out-of-state visitation could reasonably be expected to reach an increase of 5% year-on-year.

The below graphs show how these scenarios are expected to play out in terms of visitor numbers and MTB attributed spend.

Figure 8. 10-Year Out of State Visitation Scenario Forecast<sup>34</sup>

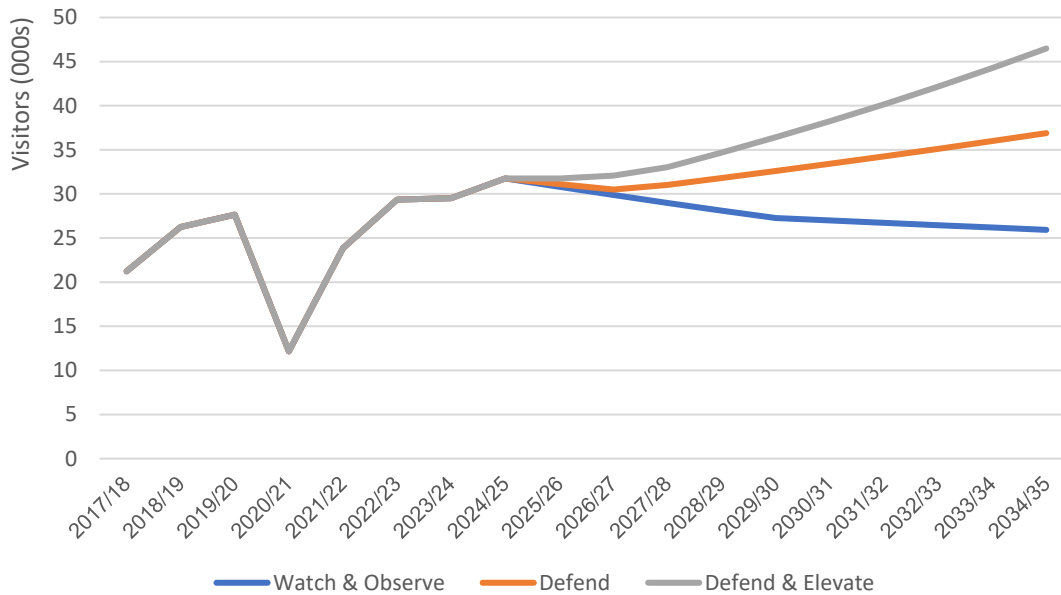
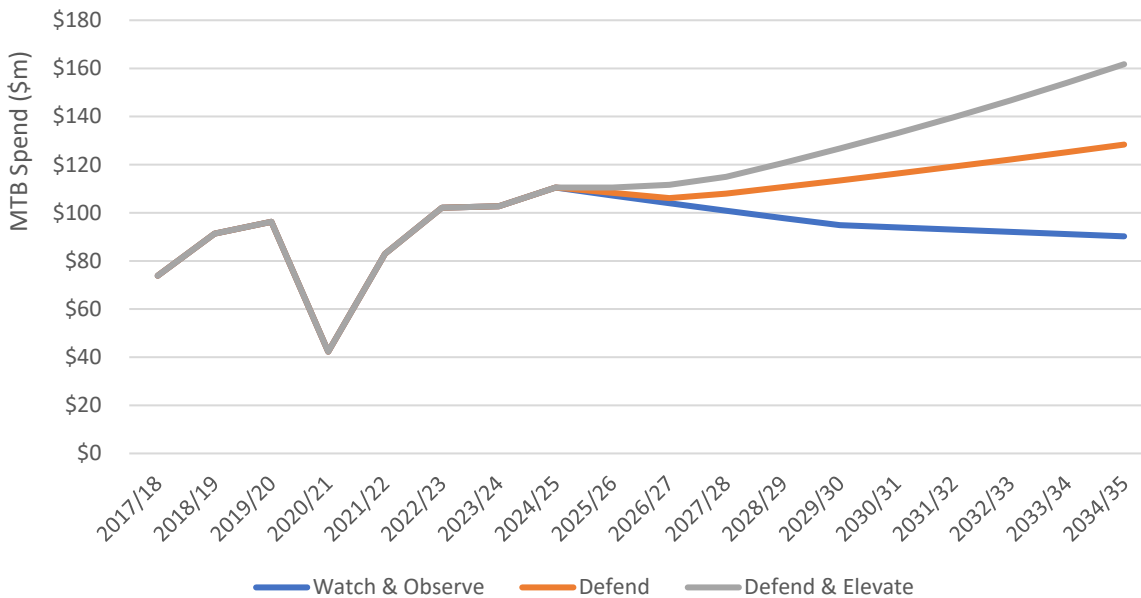


Figure 9. 10-Year Forecast - MTB Attributed Spend<sup>35</sup>



<sup>34</sup> Please note this graph shows out-of-state visitation only, as this is the market most likely to be influenced by Tasmania’s mountain biking industry actions over the coming years.

<sup>35</sup> Please note the figures above have not been adjusted for inflation, to enable an easier interpretation of industry growth over time.

Table 20. 2034 Scenario Economic Impact Projection – MTB Attributed Spend - 2025 dollars

	2025	2034
Scenario 1 - Watch & Observe	\$107,174,080	\$90,230,356
Scenario 2 - Defend	\$108,278,967	\$128,342,843
Scenario 3 - Defend & Elevate	\$110,488,742	\$161,734,146

Table 21. 2034 Scenario Economic Projection – MTB Attributed Spend - 2034 dollars

	2025	2034
Scenario 1 - Watch & Observe	\$107,174,080	\$117,781,013
Scenario 2 - Defend	\$108,278,967	\$167,530,648
Scenario 3 - Defend & Elevate	\$110,488,742	\$211,117,548

These figures show the estimated 2034 spend in 2034 dollars. I.e. In 2034, under scenario 2 the estimated MTB attributed spend is \$168m, measured in 2034 dollars.

## 7.2 Priorities for investment

This report has examined the economic value of MTB tourism to Tasmania, drawing on primary data, secondary sources and established economic modelling techniques. Through this process, perspectives from the riders, industry and managers have indicated critical priorities for investment to ensure that Tasmania remains a premier MTB destination that is recognised on a global scale. Supporting this, comparative benchmarking has illustrated opportunities for growth and expansion of the value MTB tourism brings to Tasmania.

Historically, MTB in Tasmania has been driven by motivated local governments and industry members with hard-won grant support from state and federal government. This report identifies the need for the management of trails to remain local, but with more reliable support from the state government in acknowledgement of the high value of MTB to regional communities, health and wellbeing and the Tasmanian brand.

“Tasmania has established itself as Australia’s leading MTB state. This has occurred through the development of successful MTB destinations; Maydena Bike Park, Blue Derby, St Helens and trails on the West Coast. This success has been achieved through an uncoordinated approach with individual Local Government proponents pursuing development in isolation without reference to a state-wide strategic direction.”

- MTB Action Plan 2024

The MTBAP24 identified recommendations and actions for a more coordinated approach to the management of MTB product in the state, and this report supports these. Findings also suggest that whilst Tasmania has a strong MTB brand, our competitive advantage is being eroded by more coordinated, well-funded and heavily

marketed alternatives in Australia and New Zealand.

Investment in MTB tourism is an investment in Tasmania’s regions. Currently, MTB tourism is worth \$61 million per year to the Tasmanian economy and supports 590 jobs, many of which are based in regional areas with few other opportunities for employment. MTB visitors spend 26% more than regular holiday visitors to Tasmania, and evidence from other MTB destinations suggests that there exists considerably more market demand than is currently mobilising to the state. Given this demand and relative value of MTB visitors both within and to Tasmania, a coordinated approach with targeted spending and resourcing could significantly increase this figure, contributing further benefits to regional communities.

Effective and targeted investment to grow MTB tourism is also an investment in the delivery of Tasmania’s State Visitor Economy Strategy. This report has shown that growing MTB tourism increases the contribution visitors make to Tasmania and maximises benefit to regional communities. It differentiates and builds awareness of Tasmania to attract MTB visitors who grow value over volume, and it is instrumental in increasing liveability, which supports the attraction of a skilled workforce.

Findings from the research in this report indicate the need to consolidate existing product with assured maintenance programs, programmatic network expansion, infrastructure investment and marketing. The next pages detail the top priorities to first defend the MTB product Tasmania already has, and then to elevate through consolidating areas of priority for market expansion.

## Defend: Make the most of what we have

The foundations of Tasmania's MTB product are strong, however maintaining our lead in the MTB tourism market is far from assured. The following priorities are aligned with the MTBAP24 and recommend work to enhance Tasmania's existing MTB assets to maximise value for visitors, the state, industry and regional communities. The recommendations are listed in priority order, however the key actions below them are identified for delivery as opportunity arises and not necessarily in priority order.

### 1. Programmatic expansion and enhancement of the existing ride experience

This report has shown that the range and quality of trails available for riding is one of the most important factors in choosing where to ride. In the current market with strong competition emerging from new and interesting products with heavy marketing budgets, it is critical for Tasmania to retain a reputation for high quality trails and experiences. Riders are happy to return to destinations, however these can lose appeal if there are no new experiences, modifications or investments coming online.

A programmatic approach to the expansion and enhancement of the existing ride experience would need to be supported by ongoing engagement with trail managers and industry operators to identify a forward program of development work, likely to include the following actions:

- 1.1. **Develop more iconic single/multi-day wilderness mountain biking experiences.** Invest in a long-distance, point-to-point wilderness trail that showcases Tasmania's iconic wilderness character. "Tasmania's equivalent to New Zealand's Old Ghost Road". Include purpose-built huts designed for mountain bikers and explore options for e-bike charging infrastructure to cater to the growing e-bike market.
- 1.2. **Expand existing iconic trail networks** to maintain rider engagement including new trail features.
- 1.3. **Develop trailheads**, including more accessible rider information and services.
- 1.4. **Explore uplift options**, including examining cableway concepts and other sustainable options such as electric vehicles
- 1.5. **Build physical information hubs** that are centrally located and accessible to guide first-time visitors on services, trail options, and essential amenities.
- 1.6. **Support ongoing research and development** on rider comfort improvements and innovations including water stations at key points throughout networks.
- 1.7. **Develop e-bike specific infrastructure** throughout significant trail networks, including charging stations and tailored signage, to support and encourage this fast-growing rider segment. New, direct e-bike centric climbing trails will also help keep riders off dangerous shuttle roads.

"The government should take ownership of the trails a bit more. Currently it's resting on Derby and Maydena, but it's much bigger than that. The North East is one of the best riding regions in Australia, and has nearly 300km of trail. And Maydena, another unique offering."  
– Trail manager

"Tasmania needs to be smarter with its funding. Focus the spend, and don't spread it out over multiple destinations. Derby is at the tipping point of becoming a global destination - it just needs the right investments. We need to think bigger, and focus the spend."  
– Trail designer

"Riders want a better trailhead, new trails, shuttles, and catering for a greater diversity of skills levels." – Trail manager

## 2. Consistent budgetary support for iconic trail network maintenance and innovation

This report has shown that well maintained trails are central to riders' decision to travel to MTB. The effective management and maintenance of existing iconic trail networks is critical to maintaining the reputation of Tasmania as a premium MTB destination. Ensuring all new trail investments are accompanied by dedicated funding for trail maintenance will support long-term quality and sustainability. Additionally, innovation in MTB is critical to maintain market engagement. This can be supported by the following actions:

- 2.1. **Develop a state government trail maintenance and innovation fund** to create and maintain high-value infrastructure with dedicated and consistent funding for trail networks on a per km basis to ensure the riding experience remains premium and brand aligned.
- 2.2. **Ensure that trail maintenance funding is included** in the planning and costing of new MTB developments.

"We need more trail maintenance funding, particularly in the first five years of a trail's life. This has been one thing elevating Tasmania above mainland destinations. Relative to new trail funding, it's very difficult to get trail maintenance funding."

– Tasmanian MTB Stakeholder

"State investment sends a message that 'this is a good investment', and good things are happening here. We need the state government to indicate to the market that this thing [mountain biking in Tasmania] is going to the moon."

– Tasmanian MTB Operator

"Word-of-mouth in the mountain bike industry is huge – particularly in referencing trail maintenance. We [Tasmania] should invest in more large scaled events to catalyse greater interest in mountain biking in Tassie. Word-of-mouth helps build our reputation."

- Tasmanian MTB Operator

## 3. Engage with Tourism Tasmania and other strategic partners to better promote Tasmanian MTB

The research in this report identifies that whilst Tasmania currently has a high brand value in MTB due to the world class events and industry marketing, there is a perceived disconnect between the quality of the Tasmanian MTB experience and the marketing that promotes it. Additionally, operators have indicated that they field a high volume of phone calls from prospective out-of-state mountain bikers who are eager to undertake a mountain biking trip to Tasmania, yet struggle to figure out what their trip should look like, or how they should structure it. This lack of coordination around the information available on riding in the state and indicates a need for centralised, objective information to help guide them.

There is also significant potential for at-destination marketing through visitor centres and collaborative marketing to attract visitors to Tasmania who did not purposely come to ride. With only 2.5% of visitors riding and a limited amount of nature-based product in the state, there exists a major opportunity to expand the market to new and novice riders through effective marketing strategies.

Tourism Tasmania has acknowledged MTB as a key adventure tourism market through the Unordinary Adventures program, which was developed in 2019. This work is due for an update in consultation with the MTB industry.

- 3.1. **Facilitate collaborative marketing efforts with Tourism Tasmania** and other adventure-based tourism operators, accommodation and food and beverage operators in line with the increasingly adventure focused Tasmania brand.
- 3.2. Working with Regional Tourism Organisations, **launch an ongoing industry education program** to connect with Tasmanian tourism operators and information providers on MTB signature & non-signature offerings.
- 3.3. Work with Tourism Tasmania to **update the Unordinary Adventures collateral** and deliver Off Season strategies for MTB options in winter months.
- 3.4. Spread the love through **identifying lesser-used high-quality trails** to reduce pressure on signature trails through marketing partnerships with MTB-N members and influencers.
- 3.5. **Build a landing page for the curious mountain biker**. This could be developed to link to the Discover Tasmania website to channel people into broader adventure tourism holidays as well.
- 3.6. **Bring awareness to Tasmania's rail trail offerings**. With strong existing rail trail offerings (specifically N.E rail trail and Railton – Sheffield rail trail), this market remains largely untapped in Tasmania. Develop strategies to bring awareness of these rail trails to a growing and high-yielding interstate & international rail trail rider market, coupled with some supporting infrastructure to streamline logistics of doing a rail trail ride.

"We need a Tasmanian mountain biking landing page for the curious mountain biker. A place for people to identify if they're a Maydena person or a Derby person, or a West Coast Trails person." – Tasmanian MTB Stakeholder

"State agencies like Tourism Tasmania could do more to assist in marketing the state as a tourism destination as well as regional dispersal. Current Tourism marketing campaigns only reference one particular audience and do not represent our region.

[Tourism Tasmania's] Off Season campaign needs to really showcase Tasmania in winter and attract visitation to trails that are still enjoyable to ride in winter." – Trail manager

#### 4. **Prioritise the attraction of significant international MTB events**

MTB events have been identified throughout this report as an important tool for leveraging effective and targeted marketing through broadcast coverage, as well as yielding local economic returns. Crankworx Whistler 2023 reached over 1.3 million people with 40 million views on Crankworx channels, and Rotorua yielded 4.6 million views globally, effectively targeting the exact audience who might consider travelling to MTB, as well as building brand awareness and value.

Both Blue Derby and Maydena have enjoyed considerable success from multiple years of the UCI Enduro World Cup and Red Bull Hardline Series. At the time of this report, Maydena Bike Park are negotiating with Events Tasmania and Red Bull regarding an extension of the Red Bull Hardline event beyond 2026. All parties are in agreement that there is significant value in continuing the event beyond 2026, and are working collectively towards confirming a 2027 event (and beyond) in the near future.

To ensure Tasmania can capitalise on the full benefit of MTB events, a strategic approach is needed:

- 4.1. Leverage Tasmania's strong reputation as Australia's mountain biking capital to continue hosting and **attract new high-profile competitions** and spectator-focused events.

- 4.2. **Strategically examine which events present the best yield** in terms of brand building and economic return for Tasmania.
- 4.3. Increase support and grant funding to **develop home-grown events** that have a unique Tasmanian lens, mountain biking events that attract high yielding groups of interstate and international visitors.
- 4.4. **Incorporate the needs of events in iconic trail surrounding region** master planning.

“The 2023 Crankworx Whistler Festival generated \$50.7 million in economic activity in Canada, adding \$40.8 million to British Columbia’s GDP, and \$29.6 million for the Whistler municipality, and Crankworx Rotorua added \$4.3 million to the local economy.” - Crankworx

## 5. **Consult with industry experts**

A critical recommendation from this report is the need to ensure that the MTB industry is engaged in decision making about MTB infrastructure, management and marketing. Tasmania’s MTB operators have personally and heavily invested in the industry and are deeply attached to its success. They deal first-hand with the market and are knowledgeable about language, trends, channels of communication, influencers and the pitfalls of getting these wrong.

- 5.1. **Engage closely with Tasmanian mountain biking industry experts**, including the MTB-N, to guide new proposals and inform investment decisions, ensuring sustainable and strategically aligned growth.

## **Elevate: Expand to meet our potential**

To elevate Tasmania’s MTB tourism potential, the state needs to learn from competitors, collaborate more effectively, build capability in our industry, improve access, attract investment. The following priorities reach beyond existing assets to expand and elevate the Tasmanian MTB experience:

## 6. **Grow Tasmania as an adventure tourism destination**

MTB visitors are adventure tourism visitors and many engage in adventure tourism beyond MTB experiences. New Zealand provides an excellent example of this. Increasing the number of adventure tourism visitors to Tasmania will directly lead to greater participation in MTB tourism.

The MTB industry has been working collectively for many years to deliver an exceptional MTB experience for the state. As we consider strategically growing the industry, it is important to ensure a depth of expertise, knowledge, collective action and passion in the adventure tourism industry. Supporting and growing the adventure tourism industry through the delivery of events that foster connection, knowledge sharing and collaboration will help achieve this.

- 6.1. **Develop an annual adventure tourism forum** for adventure tourism operators to collaborate and develop unified adventure tourism strategies that attract an ‘adventure tourist’ to Tasmania that is likely to embrace several adventure tourism experiences while in the state.
- 6.2. Develop and commit to a **world leading MTB trail building TAFE course** that can raise the industry standard for MTB trail building around the country and the world. Encourage mountain

bikers to move to Tasmania and pursue a career in the mountain biking industry, learning from the best builders in the industry.

- 6.3. **Invest in visitor geotracking and other research** to build market knowledge and understanding. This may be at a statewide level as part of the Tasmanian Visitor Survey, or at a more specific level for MTB or adventure visitors.
- 6.4. **Conduct a demand assessment and gap analysis** for Tasmanian adventure tourism as a whole within the current competitive landscape, focusing on the adventure visitor journey and identifying gaps in experience delivery. The findings from this can support industry development and assist in attracting investment.

## 7. Pursue better access for MTB visitors

Access to major markets is critical for the growth of the industry, as evidenced by the success of Queenstown in New Zealand, which has an international airport. Engaging with airlines and tour operators to ensure clarity on MTB transport, connection at the airport and transport to the trail networks will enhance the appeal of Tasmania's MTB offering to people visiting the MTB. Supporting Tourism Tasmania's access strategy to deliver more and more frequent direct flights to key markets will encourage more MTB visitor attraction.

The new Spirits of Tasmania also present a major opportunity for Tasmania's MTB industry. With 25% of visitors who MTB arriving on the Spirit of Tasmania ferries, the expanded capacity of the new vessels are presenting significant opportunities for MTB market development. This recommendation is secondary to the need to invest in product and trails, but the Spirit Preparedness fund provides significant potential to access funding for further development.

- 7.1. **Work with TT Line** on collaborative marketing, visitor information and easy access for bikes on the Spirits of Tasmania.
- 7.2. Advocate with Tourism Tasmania for **additional direct flights** from key markets to reduce accessibility barriers.
- 7.3. Improve awareness and **streamline "bike and drive" options** and airport transfer services from Hobart and Launceston to key mountain biking hubs.

## 8. Attract and leverage private investment opportunities

This report has been clear in the need for significantly more funding allocation to trail development, maintenance, supporting infrastructure and services. Given the state's current fiscal position, attracting and leveraging targeted private equity to grow Tasmania's MTB product could underpin a more effective response to the increasing competitive environment. To ensure this investment is appropriately targeted and impactful, investment consultation with the MTB Network is recommended.

- 8.1. **Develop an investment prospectus** to support and encourage targeted private investment in trail and bike park development as well as complementary services such as mountain bike coaching, guiding, bike washing and laundry. These enhance visitor experience and create additional business opportunities within mountain biking destinations.

### 7.3 Assumptions and further work

There are many aspects of MTB tourism that have not been addressed in this report, as it has attempted to maintain a clear focus on the contribution of MTB tourism to the Tasmanian economy and community. Additions that could further enrich the findings of this report include:

1. Analysis of MTB riders willingness to pay (WTP) to use free MTB trails. This would help to inform a more accurate 'Consumption' figure for each MTB destination; the figure that represents value added, plus consumption of non-monetary goods, such as free to use MTB trails.
2. A full market demand analysis – an independent market research study that explores the true capacity of the market to expand as competitors come online.
3. An analysis of 'carrying capacity' – allowing for seasonality, an exploration of the from an accommodation and trail capacity perspective.
4. An analysis of the customer journey of a MTB visitor – from considering options, to selecting, planning, considering the broader travel experience, booking, travelling, and sharing.

Assumptions not previously mentioned in this report include:

- The observed sample from the surveys are representative of the total population visiting Tasmania for mountain biking tourism.
- Tasmanian Visitor Survey (TVS) data captures an accurate sample of out-of-state visitors mountain biking in Tasmania
- Those out-of-state mountain biking visitors who undertake multiple trips to Tasmania for mountain biking purposes each year are reflected in TVS data.
- All spending is expressed in 2025 AUD.
- Historic data has been inflation-adjusted for comparability.

- The spend estimates collected during the survey period are reflective of average MTB trip spend for visitors throughout the year.

### 7.4 General reliance restriction

This report is prepared solely for the use of the Mountain Biking Network - Tasmania. It was prepared for the purpose of demonstrating the current and potential value of MTB tourism under a defined set of assumptions, specified in collaboration with the MTB-N. This report is not intended to and should not be used or relied upon by anyone else and we accept no duty of care to any other person or entity. Due to the uncertain nature of economic data and forecasting, episteme does not warrant the accuracy of the analysis or estimates provided in this report.

### 7.5 Conclusion

This report has shown that mountain bike tourism is a major contributor to Tasmania's economy, generating \$113 million in direct MTB-attributed spend, \$78.7 million in direct output, and supporting 590 FTE jobs in the year ending March 2025. With targeted and effective investment, this could grow to more than \$200m in spend over the next decade.

To realise this potential, investment must extend beyond building new trails to include ongoing maintenance, improved access, and supporting services, ensuring Tasmania's premium product is sustained. International comparisons highlight that leading MTB destinations succeed by leveraging natural assets, diversifying tourism offerings, and strengthening supporting infrastructure and marketing. For Tasmania, the lesson is clear: MTB tourism should be developed as part of a broader, connected adventure tourism industry, underpinned by strategic investment that maximises economic returns and reinforces the state's position as a world-class destination.

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