

An aerial photograph of a mountain biker on a dirt trail in a lush forest. The trail is a narrow, winding path of brown earth and fallen leaves, cutting through a dense carpet of vibrant green ferns. Several tall, slender tree trunks are scattered throughout the scene. The biker, wearing a red and white jersey, is positioned in the lower-middle section of the frame, facing away from the viewer. The overall atmosphere is one of a quiet, natural outdoor setting.

NEXT STEPS

Maintaining Tasmania's position as
Australia's leading MTB destination.

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Silver City, Zeehan.
Image: Jasper Da Seymour/Next Level MTB

WHAT IS THE PURPOSE OF THIS DOCUMENT?

The purpose of this report is to present the positive economic, social, and regional impacts that mountain biking delivers for Tasmania, and to define the next stage of investment required to sustain and grow those benefits.

Over the past two years, the Mountain Bike Network - Tasmania (MTB-N) through the support of the Department of State Growth has led a coordinated effort to define the future direction of mountain bike tourism in the state.

This work has included delivering three related projects — the *Mountain Bike Tourism Action Plan (2024)*, *Maximising the Value of Mountain Biking to the Tasmanian Economy (2025)*, and the *Feasibility Assessment Framework (2024)*.

The *Mountain Bike Tourism Action Plan* established a strategic vision for the sector and introduced a consistent, statewide approach to assessing trail development opportunities. It was informed by extensive consultation with local government, State Government agencies, industry operators, and tourism bodies.

The *Feasibility Assessment Framework*, developed through this process, provides a structured and transparent method for evaluating potential projects against economic, environmental, experiential, and community criteria.

Building on that foundation, MTB-N commissioned the *Value of Mountain Biking to the Tasmanian Economy* report to demonstrate the industry's current contribution to the Tasmanian economy and project the impact that MTB tourism may have with ongoing, strategic investment.

Further independent economic data was made available following the Red Bull Hardline even in 2025. This additional visitation and economic impact is included in this document and attributed to Maydena Bike Park as well as the State totals.¹

¹ To achieve consistency across the two data sources, 8.58 FTE jobs per \$million GSP/value add (the same rate used *Value of Mountain Biking to the Tasmanian Economy* report) has been used to calculate the additional employment benefit attributable to Maydena Bike Parks event impact.

Building on these foundations, this report applies the understanding gained through those processes to identify and prioritise investment opportunities that will sustain the industry.

WHY IS MTB TOURISM IMPORTANT TO TASMANIA?

Tasmania's entire mountain bike tourism network has been developed for less than \$30 million in public capital investment over the past decade.

That modest investment is now generating **more than three times its total cost every year** in direct out-of-state visitor spending and around **\$63.3 million in annual Gross State Product.**

Few other tourism products in Tasmania can demonstrate a comparable return on public investment, particularly one that also delivers lasting community, health and environmental benefits alongside its economic outcomes.

Investment in mountain bike tourism is investment in Tasmania's regions. It delivers significant economic returns, strengthens communities and helps the State maintain its reputation for leading Australia in MTB tourism.

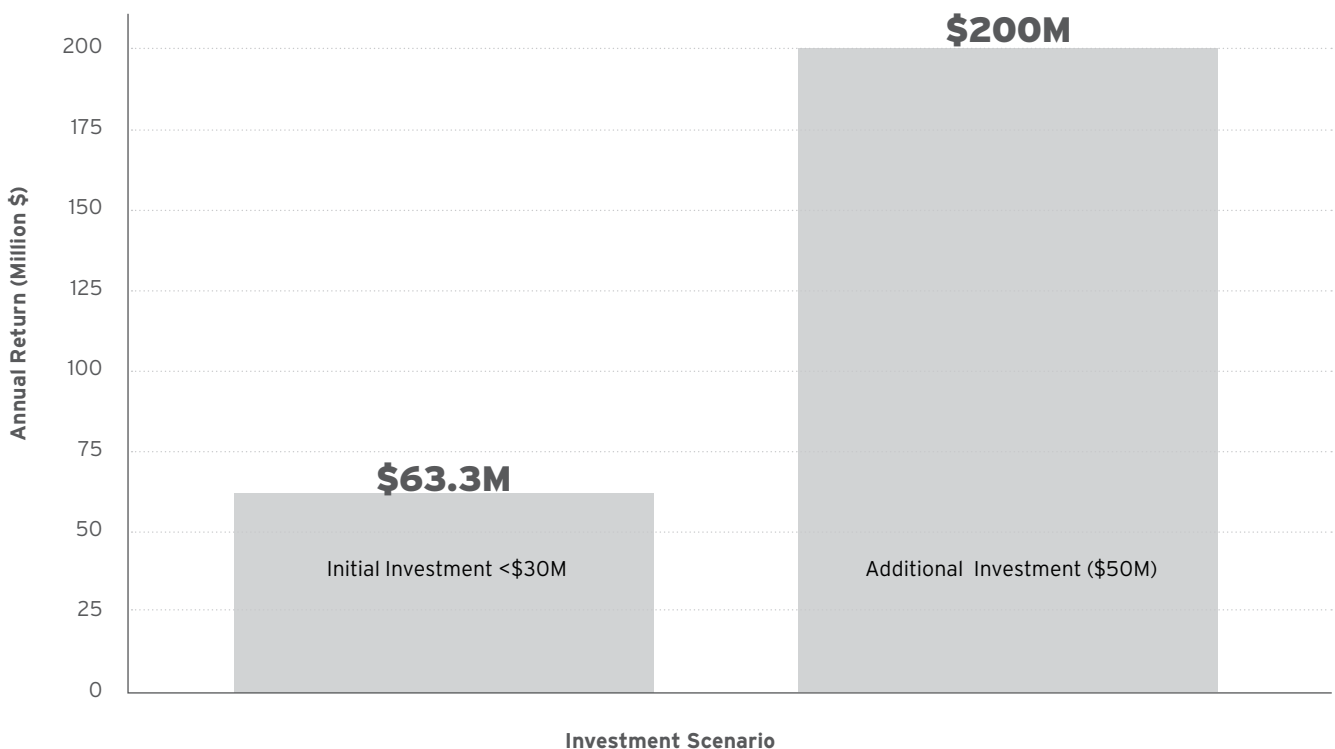
Mountain bike tourism has become one of the strongest drivers of Tasmania's visitor economy—particularly in regional areas where few other industries are growing. It is estimated to support around **610 full-time-equivalent jobs**, most of them in regional communities.

People who visit Tasmania to ride spend significantly more than non-riding visitors. Survey data show that **MTB visitors spend 26 per cent more per trip** than regular holiday visitors, stay longer, and visit more regional and nature-based attractions

Their average trip length is **9.9 days**, with about **five to six days** of that spent riding. Around **70 per cent** of riders travel to Tasmania specifically for mountain biking, meaning the trails themselves are the reason they visit.

That modest investment is now generating more than three times its total cost every year in direct out-of-state visitor spending and around \$61 million in annual Gross State Product.

Projected Annual Return on Investment





HOW MUCH DOES MTB TOURISM CONTRIBUTE TO THE TASMANIAN ECONOMY?

In the year ending March 2025:

- **\$149.76 million** was the total expenditure of MTB visitors to Tasmania.
- **\$117.46 million** was direct MTB-related expenditure.
- Of this, **\$92.75 million** came from visitors outside Tasmania.
- The remaining **\$24.67 million** was generated by Tasmanians travelling within the state to ride (greater than 50km from home).

This mix highlights how mountain bike tourism brings money into the State (interstate and international visitor spend) and through local recreation/regional visitation within Tasmania, distributes spending from major population centres to regions.

NON-MONETARY IMPACTS OF MTB TRAILS

While the economic return is substantial, the benefits of MTB trails extend well beyond spending:

- **Attracting Residents:** Trail development has influenced population growth; a survey in Break O'Day found that about 25 per cent of new residents were drawn to the area because of the trail network.
- **Health and wellbeing:** Trails encourage physical activity, outdoor participation and youth engagement.
- **Identity and brand:** Quality trails in iconic Tasmanian environments is aligned with and contributes to the Tasmanian brand.

WHERE IS THE ECONOMIC IMPACT GREATEST?

The economic impact of MTB tourism is primarily attributed to Tasmania's two most successful destinations, **Blue Derby** and **Maydena Bike Park**. Both are in small towns, in areas where other industries have contracted.

Together these two networks account for **89 per cent of Tasmania's total MTB-related economic output** – a combined **\$104.8 million** in annual visitor spending and **more than 534 regional jobs**.

The remaining expenditure is distributed across all other destinations.

Destination	Blue Derby	Maydena Bike Park ¹
Direct MTB-related expenditure	\$50.9 million	\$53.96 million
Value-added contribution to GSP	\$26.6 million	\$30.4 million
Jobs Supported (FTE)	≈ 274	≈ 260
Visitor Mix (Approx)	73% intrastate 20% interstate 7% international	48% intrastate 45% interstate 7% international

¹Maydena totals include the additional economic impacts attributable to the 2025 Redbull Hardline event made available following the delivery of the Value of Mountain Biking to the Tasmanian Economy report.



WHY IS MORE INVESTMENT REQUIRED?

Tasmania's success in mountain bike tourism has been built on the quality and distinctiveness of its trail experiences. However, much of the infrastructure that established this success is now ageing and competing destinations are rapidly commissioning new trails.

Projections suggest that with targeted and effective investment, visitor expenditure could **grow to more than \$200m per annum** over the next decade.

Without this investment, the risk for Tasmania is many riders have already visited Tasmania, multiple times, and may choose to explore these new destinations which collectively offer hundreds of kilometres of trail. Mainland destinations have learnt from Tasmania and applied this knowledge to create strong MTB tourism products. It is now ten years since the development of Blue Derby and the MTB tourism market and the products the market demands have evolved.

To remain competitive, Tasmania must reinvest in its most successful networks and enhance others that have the potential to. Regular renewal—reprofiling, re-alignment, and selective redevelopment of existing trails—is essential to preserve the riding experience that underpins visitor satisfaction and repeat visitation.

At the same time, Tasmania's future growth depends on adding breadth to its trail offering. Riders explore new environments through trails. Multi-day and wilderness experiences that connect towns and landscapes, purpose-built jump and progression trails

for safe skill development, and well-designed shuttle and e-bike routes that improve efficiency and experience for riders.

Developing trail in new Tasmanian environments will showcase the diversity of Tasmania's landscapes and broaden the state's appeal. This diversification will not only attract new markets but encourage returning visitors to explore different regions, sustaining the economic and community benefits that mountain bike tourism brings.

Tasmania's next phase of MTB tourism investment should therefore prioritise enhancing its established destinations and addressing clear opportunities to improve others while developing complementary trail types and experiences that broaden appeal and strengthen regional connections. This dual focus—renewal of existing assets and strategic diversification—will ensure that Tasmania continues to deliver a world-class riding experience, supports regional visitation, and remains the benchmark for sustainable mountain bike tourism in Australia.

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WHAT DO WE NEED TO INVEST IN TO STRENGTHEN AND SUSTAIN MTB TOURISM IN TASMANIA?

TRAILS

Tasmania's mountain bike tourism product is our trails and the businesses that create experiences around them. For this reason, most investment priorities are trail developments of investigations that will lead to them.

To sustain growth and attract new visitors, Tasmania needs trails that increase the diversity and novelty of experiences available to riders. This can be achieved through building more and renewing what we have.

The MTB Action Plan sets out a rationale for developing further trails based on the understanding that a trail experience is the sum of what it's like to ride the trail and where the trail is - the trail dynamic plus the trail setting. Tasmania's strongest opportunity is to develop trails in its unique environments that ensure the experiences cannot be imitated by competitors.

New trails will provide visitors with

the opportunity to access different environments by bike as well as developing new trail types such as multi-day and wilderness journeys, jump and skills progression trails, and further shuttle-accessed gravity descents.

Each addition must complement rather than duplicate what already exists, broadening Tasmania's overall offering and giving returning visitors new reasons to travel.

Renewal of existing trails can be adapting or replacing those that are no longer popular with experiences that better reflect current demand. In some destinations, there are significant spatial constraints that limits more trails being added. Renewing or repurposing trails in these areas can enhance the experience an area provides significantly simplifies the trail development process by using existing, assessed and approved alignments.

Where there are clear gaps that limit the effectiveness of an existing destination (like

insufficient volume, lacking a trail style etc) and these can be remedied through further feasible (economic, physical and legislative) development, these developments are recommended.

For Maydena Bike Park and Blue Derby the recommendations describe additional trails to increase repeat visitation, renew popular and repurpose underutilised trails and increasing the diversity of product to include new trail types and access new markets; particularly where there are large volumes of non-MTB visitors, providing this market with accessible, introductory experiences.

For other areas the recommendations address gaps described by the MTB Action Plan and provide access to different Tasmanian landscapes, increase trail volume where that is a limitation and diversify the trail offering, usually to provide MTB experiences for visitors that aren't yet mountain bikers.



MARKETING

The experiences that our trails provide need to be communicated to the market through effective and ongoing marketing programs that also include high-profile events.

An ongoing commitment to marketing will give Tasmania the best chance to compete with emerging mainland destinations.

Even the best trails rely on effective communication to reach their audiences and attract riders. Coordinated, long-term investment in mountain bike marketing is required to maintain awareness and convert potential visitors into travellers.

Marketing should be evidence-based and aligned with Tasmania's brand, showcasing distinctive environments and experiences.

This includes ongoing content creation, destination storytelling, and targeted digital campaigns that position Tasmania as an adventure destination. Consistent messaging will not only strengthen awareness interstate and internationally but also increase yield by attracting riders motivated by quality, not volume.

MEASUREMENT

Evidence creates investment confidence and maintains community support. A consistent, statewide approach to collecting and analysing data is needed to measure visitation, understand rider behaviour, and guide future decisions.

We need to measure what is working and why. This will allow strategic investment in more trail that contributes effectively to

Tasmania's position as a MTB destination.

Current measurement of visitation is inconsistent, relying on the TVS, trail counters and rider report through survey.

Establishing ongoing and coordinated data collection — through improved trail counters, rider surveys, geotracking, and economic analysis — will ensure Tasmania can continue to demonstrate the ongoing return on investment from trail

development, identify emerging markets and opportunities, and prioritise funding where it will deliver the greatest impact.

The developments that follow are not an exhaustive list but of achievable priorities.

WHAT NEEDS TO HAPPEN NEXT?

TRAIL INVESTMENT PRIORITIES.

The investment priorities that follow are outcomes of the three projects that inform this document. They draw on direct consultation with trail managers and stakeholders and on the strategic evaluation of current trail supply, demand, gaps, and future opportunities articulated in the Mountain Bike Tourism Action Plan.

Blue Derby/North East Region.

Development Focus (What)	Purpose / Rationale (Why)
<p>Complete detailed feasibility assessment, design and construction of further wilderness trails in the region. Investigations should focus on areas offering connection to existing trails or where a level of feasibility assessment has already occurred. This/these trails should provide a distinct experience, complementing the Blue Tier, Bay of Fires Trail and Dreaming Pools.</p>	<p>Data supports the role that the north-east's long-distance point-to-point wilderness trails play in attracting visitors and increasing the duration of their stay. This type of product is well-aligned with the Tasmanian brand and allows creation of inimitable experiences due to their dependence on unique Tasmanian environments.</p>
<p>Black Stump shuttle road extension/duplication. Extend the existing shuttle road or establish a new road to access more elevation.</p>	<p>An increased elevation range serviced by shuttle will improve rider experience and the viability of commercial shuttle businesses. Access to this road extension should be limited to licenced business to discourage private shuttles which will reduce safety/experience issues related to riders using the road and private vehicles.</p>
<p>Renew, repurpose and add trails accessed by the Black Stump shuttle that provide a continuous descending experience across the range of technical difficulty ratings and trail styles.</p>	<p>More trails and a greater elevation accessed by shuttle will enhance rider experience, improve rider safety and visitor stay/spend. Include Green, Blue and Black jump trails using table-tops and located close to emergency access. The limited space available will require renewal and repurposing of existing trails.</p>



Blue Derby.
Image: Adam Gibson

Maydena Bike Park/Maydena.

Development Focus (What)	Purpose / Rationale (Why)
Support the development of trails accessing and connecting points of interest outside the Park.	This will diversify the trail offering and provide riding outside of the Park's current season. Easy trails that create the opportunity to ride to and between points of interest will be accessible to non-MTB visitors taking advantage of the large-volume of visitors to Mt Field National Park.

West Coast.

Development Focus (What)	Purpose / Rationale (Why)
Undertake feasibility assessment, design and construction of a shared use trail from the existing Tramway Street trailhead to the base of Horsetail Falls.	This trail will provide an introductory MTB experience, improve the experience offered by the existing network and enable further low-cost trail developments to increase trail diversity and number. It will also enable through-hiking from Hauland Gap and existing Horsetail Falls viewing trails.

St Helens.

Development Focus (What)	Purpose / Rationale (Why)
Further shuttle trails that prioritize constant descending from the shuttle drop or from a reasonable distance above. Diversity of styles and range of technical difficulties with a focus on jump trails close to access across the full difficulty rating spectrum.	Shuttle trails are extremely popular and provide direct economic opportunity as well as a chance for trail managers to generate revenue proportional to user volumes to support trail maintenance.

Tasman Peninsula, Central Tasmania.

Development Focus (What)	Purpose / Rationale (Why)
Investigate the feasibility of establishing MTB experiences that provide riders with experience of Tasmanian coastal and pastoral environments respectively.	<p>These two environments identified in the Action Plan are examples of iconic Tasmanian landscapes that do not contain MTB experiences.</p> <p>The coastal setting of the Tasman Peninsula has an existing MTB trail proposal progressed that could easily be adapted to meet demonstrated demand and further diversify our trail experiences.</p>

MARKETING INVESTMENT PRIORITIES.

Development Focus (What)	Purpose / Rationale (Why)
Secure an ongoing, multi-year commitment from Government to invest in marketing our MTB product that is proportional to the benefits it provides.	Consistency and a higher volume of quality content will ensure our MTB product is visible and competitive in a market of well-resourced mainland destinations.
Support the establishment a body that is equivalent to the former Mountain Bike Reference Group (Tourism Tasmania - Unordinary Adventures Program) to guide marketing spend.	Mountain bike tourism is best understood by industry. Marketing spend will be most effective when allocated by a group composed of industry experts. This could be facilitated by the MTB-N or the MTB-N could be resourced to perform this role.

MEASUREMENT INVESTMENT PRIORITIES.

Development Focus (What)	Purpose / Rationale (Why)
Modify the Tasmanian Visitor Survey (TVS) to increase the detail and accuracy of information about MTB visitor behaviours.	Greater collection of more detailed data will support better decision making and resource allocation into the future.
Trial mobile location data collection/access.	Mobility data allows identification of visitor origin markets and travel behaviour without compromising privacy. Understanding where visitors come from, where they ride and how they move between destinations will strengthen marketing decisions, evaluate the effectiveness of trail development, and demonstrate the broader regional impact of mountain bike tourism.

