

BREAK O'DAY

Recreational Trails Strategy



December 2022



This report was prepared by TRC Tourism for Break O'Day Council as part of the development of the Break O'Day Recreational Trails Strategy.

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ACKNOWLEDGEMENT

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

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Contents

1	Introduction	1
2	Strategic Directions	9
3	The Trails Market	15
4	Assessment of Break O'Day as a Trail Destination	39
5	The Future of Break O'Day Recreational Trails	53
6	Strategic Priorities And Actions	68
7	Appendix	73p
	APPENDIX A. Mountain Bike Trail Types AND RATINGS	74
	APPENDIX B. CASE Studies	77
	APPENDIX C. Potential and Opportunity for Trail Development	83
	APPENDIX D. PROPOSED AND EXISTING trails HIERARCHY	89
	APPENDIX E. Break O'Day PRELIMINARY trail audit	97
	APPENDIX F. break o'day existing mtb network	104
	APPENDIX G. tasmanian target markets	105
	APPENDIX H. east coast tasmania trail PROPOSAL	106
	APPENDIX I. Rotorua Mountain Biking - Management and Governance	107
	APPENDIX J. Community surveys	109
	APPENDIX K. ECONOMIC IMPACT ASSESSMENT REPORT	111

Executive Summary

The Break O’Day Recreational Trails Strategy has been prepared to guide and plan for the future development and activation of a network of sustainable trails to realise maximum social, economic and health benefits for the Break O’Day region.

The strategy will assist the Break O’Day Council and its stakeholders to continue to build the region as a premier trail hub that caters for a range of trail-based activities and events. With a strong existing offering of trails that draw domestic and international visitors, including the Bay of Fires, Blue Tier and St Helens MTB Trails and the privately operated wukalina and Bay of Fires Lodges Walk, this strategy will build on this success, and ensure that the future network is able to achieve the vision for the region:

Vision for Break O’ Day Recreational Trails

Break O’Day connects the special values of the ranges, river valleys and coastal landscapes through extraordinary trail and adventure experiences that link communities, locals and visitors and are supported by strong environmental protections, sustainability and innovative trail experience providers.

The Break O’Day Recreational Trails vision, strategic direction and future are guided by regional and state policy frameworks – these frameworks and community views provide an important context for this Strategy. They include:

- East Coast Tasmania Destination Management Plan DRAFT | JULY 2021
- T21 Action Plan Tasmanian Visitor Economy Strategy¹
- Break O’Day Strategic Plan 2017–2027.
- Trail use markets in Australia

Outdoor active recreation, including trail running, walking, mountain biking and gravel riding, has become increasingly popular. In many parts of the world, trail networks have become significant visitor destinations which attract international visitors, contribute to economic sustainability and provide recreational opportunities and health benefits for regional and local communities.

- Trail running is one of the world’s fastest growing sports. Since the mid-1990s, the popularity of trail running has grown at a rate of 15% each year. A report into trail running in NSW in 2013 showed a 521% increase in event-based participation over three years 2010-2013²
- 1.3 million Australian adults (6.4% of the adult population) and 21,000 children participate in bushwalking activities annually, with 18% of participants undertaking bushwalking activities at least once per week
- 78% of Tasmania’s East Coast visitors go bushwalking, with 62% undertaking short walks of less than four hours
- Recent estimates on mountain bike participation suggest that around one million Australians engage in mountain biking activity, ranging from beginner through to competition level.³

¹ <https://www.t21.net.au/>

² <https://www.worldathletics.org/disciplines/trail-running/trail-running>

³ Warburton Mountain Bike Destination 2019 – Instinct and Reason

Value of trails

The benefits associated with cycling, walking and running include:

- Health and physical activity (in terms of increased life expectancy and reduced risk of disease and illness)
- Increased tourism revenues and greater business investment
- Attracting and retaining people within communities, particularly youth
- Providing outdoor classrooms for physical activity, sport, nature, culture and history
- Enhanced environmental awareness, improved understanding of our natural heritage and stewardship for the environment
- Developing recognition and respect for Tasmanian Aboriginal culture and values
- Health system benefits (in terms of a reduction in costs borne by the health system as a result of physical inactivity)⁴
- Research and Australia-wide examples indicate attracting mountain bikers to purpose-built locations can have significant economic benefit. Research by GHD and AusCycling estimate that people who mountain bike spend approximately \$27.10 per ride.⁵

Heritage, cultural and environmental considerations

For Aboriginal Tasmanians, North East Tasmania is a highly significant cultural landscape where the community continues to demonstrate its living culture and connection to the land.

The Strategy has explored opportunities where Aboriginal Tasmanians, local people and visitors can experience the Aboriginal Culture and landscape.

Trails that are designed to highlight the natural landscape will contribute to greater awareness and understanding of our ecosystems and natural places, leading towards advocacy and protection. Trails should be developed with minimal impact to the environment and, if developed effectively, can contribute to

ecosystem health particularly when combined with species management, recovery plans and restoration projects.

The learnings from the St Helens MTB Trails project acknowledge best practice environmental initiatives and provide the opportunity to apply similar practices to new trail planning, construction and management projects.

The coast has many biodiversity values and challenges, and the Strategy recommends effective assessment of future trail experiences on the coast due to the potential impact on shore birds and Aboriginal cultural sites.

As many of the existing/established trails within Break O'Day are situated on Tasmania Parks and Wildlife Service (PWS) and Sustainable Timbers Tasmania (STT) land, the Council is working closely with these agencies in the development and future delivery of the recommendations of this Strategy.

Community views

A successful trail destination is more than its physical trails. Success also relies on a combination of factors, including reputation for quality and special experiences and, importantly, popular support and use by locals.

The views of stakeholders and the community were sought in the development of Break O' Day Recreational Trails Strategy.

Community views from the Recreational Trails Survey, the St Helens Mountain Bike Trails - Rider Survey and Community Drop in Sessions are provided within this Strategy and are summarised in Appendix K.

⁴ Transport and Infrastructure Council. 2016. Australian Transport Assessment and Planning Guidelines, M4 Active Travel

⁵ GHD Report for AusCycling - Mountain Biking in Australia: An Economic and Participation Analysis

Trail partnerships with land managers

The Strategy recognises the strong partnerships between the Council, Tasmania Parks and Wildlife Service, Sustainable Timber Tasmania and other landowners and managers. Trails across these lands are critical to the Break O' Day trail mix and need to be financially, socially and environmentally sustainable to ensure long-term viability and include a strong focus on good trail design to reduce costly maintenance of trails.

Trail visitor access arrangements and identification of priority trails is an important consideration with land managers. The Strategy recognises the importance of detailed environmental investigations very early on in the planning and development process.

Vision, guiding principles, objectives and signature, supporting and local Trails

For Break O' Day to continue and further develop as a distinctive Trails Hub requires commitment, leadership and investment. It also requires trail networks to be well managed, attractive to a wide range of people including visitors and locals, and to have a strong focus on sustainability. A future Break O' Day trail network will include a combination of signature, supporting and local trails.

The future of the Break O' Day Recreational Trails network will be guided by the following principles, developed in consultation with the community and key stakeholders:

- High quality and diverse trail network
- Sustainable trails infrastructure and services
- Inclusive user experience
- Collaborative governance, management cooperation
- Coordinated marketing and promotion.

What is a trails hub?

A trail hub is a population centre or region that offers a large range of high-quality trails, trail-user related services, facilities, trail-related businesses, strong branding and supportive governance.

At the core of attracting trail users is the environment and setting, the quality and quantity of trails, their accessibility and the interest and challenge offered.

Trail classification

Trails can be classified by a hierarchy of offering, which can help define prioritisation for investment, management, maintenance and marketing.

Figure 1. Trails Classification Signature, Supporting and Local Trails

SIGNATURE TRAILS

A small number of outstanding trail experiences that have the pulling power to persuade a visitor to come to the Break O' Day and generate the greatest economic and local benefit.

E.g. Bay of Fires and Blue Tier Mountain Bike Trails; privately operated Bay of Fires Lodge and wukalina walks.

SUPPORTING TRAILS

A less prominent visitor offering but providing quality visitor and local experiences to support signature trails and hubs, and important recreational opportunities for local communities.

E.g. Blue Tier Forest Reserve walking trails; Leeaberra - Apsley River Waterhole and Gorge, Evercreech 'White Knights' walk and waterfall

LOCAL TRAILS

Important to the local community, often developed through local action.

E.g. Winifred Curtis Reserve Walks, Coal Miners Heritage Walk Cornwall.

Figure 1. Proposed new and upgraded trails discussed in this Strategy.



Figure 2. Existing trails recognised and supported by land managers.



Economic impact assessment

Michael Connell and Associates (MCA) provided an economic impact assessment of the Break O'Day trails network and a cost-benefit analysis of the proposed new trails and improvements to existing trails. The results are indicative of the benefits of the extended trails for walkers and mountain bikers.⁶

Two types of analysis were undertaken: estimates of number of trail users (mountain bikers and walkers) and development of 10-year projections (based on growth in user markets and the extended/improved trails) and the total benefits to the region; and a cost-benefit analysis: estimation of the growth in trail users over this period to measure benefits compared with the proposed capital spending (\$6.995 million) on new trails and trail improvements.

The analysis of each of the trail-user segments allows for a comparative assessment of the economic impacts of trail users on the Break O'Day regional economy.

Trail operations – other benefits

There are several other benefits that can be estimated for the trails. These are: health benefits and productivity benefits associated with exercise; and a consumer valuation of the trails experience (measured by a shadow price or the notional amount people would be willing to pay to use a trail).

- Total other measured benefits increase from \$7.8 million in the base year (2021) to \$10.9 million in year 10. Total for 10 years is \$102.5 million
- Other benefits for mountain bikers increase from \$3.6 million in the base year (2021) to \$5.4 million in year 10 (2031). Total for 10 years is \$48.8 million

- Other benefits for walkers increase from \$4.2 million in the base year (2021) to \$5.6 million in year 10 (2031). Total for 10 years is \$53.7 million.

Cost-benefit analysis

All benefits and costs are analysed for a 10-year period for the trails development and improvements. The measured benefits are those associated with the growth in user numbers (from the estimated 2021 base numbers) over the 10-year period. Total trail users would increase by around 77,100 over the 10-year period (mountain bikers = 41,600 and walkers = 35,500). The benefits compared with costs are those associated with this projected growth in users.

Reserve Activity Assessment

Visitor experiences proposed within the Break O'Day Recreational Trails Strategy have been selected for sustainability, low impact and value to the community and visitors. The Tasmania Parks and Wildlife Service (PWS) assesses whether new or recurrent works or activities on PWS-managed lands are environmentally, socially and economically acceptable. Activities on PWS lands may require additional activity assessment and documentation to:

- Ensure the activities comply with relevant statutes, policies and plans
- Assess environmental, social and economic benefits and impacts
- Establish further actions to be taken to maximise benefits and minimise impacts
- Ascertain whether a proposal is approved, approved with conditions or not approved
- Establish whether the activity, when completed, achieved its stated objectives.

⁶ In this report walkers cover casual walkers on the trails, bush walkers and trail runners.

Strategic priorities and associated actions have been developed for the Break O’Day Recreational Trails Strategy.

STRATEGIC PRIORITY	ACTIONS
<p>① Trail infrastructure purpose built in exciting places for a range of users and to a high quality. Trails link the mountains to the sea and communities together. Trails have broad appeal for a diverse range of people of different capacities and abilities.</p>	<p>1.1 Prioritise investment, management, maintenance and marketing through the Proposed and Existing Trails Hierarchy (presented in Appendix D and map figure 1).</p> <p>1.2 Establish a range of trails suitable for local people to walk, run or ride close to or within towns for enjoyment and to contribute to community health and wellbeing.</p> <p>1.3 Provide improved trail attractions within the Fingal Valley to attract visitors and for enjoyment of local people, including liaising with Tasmania Parks and Wildlife Service, and seek funding to upgrade the popular St Patricks Head Walking Trail.</p> <p>1.4 Seek continuous improvement to the Bay of Fires, Blue Tier and St Helens MTB experience including recognition as International Mountain Bike Association (IMBA) Epic Trail and Mountain Bike Town to contribute to the North East becoming recognised as the iconic MTB destination in Tasmania and an IMBA trail hub.</p> <p>1.5 Improve visitor access to trails including encouraging safe off-road cycling and take-up of shuttle services to reduce congestion and improve safety.</p> <p>1.6 Break O’Day Council together with land managers will provide where possible access-friendly trail experiences for a broad range of people, including mobility impaired visitors, to enable them to enjoy the Break O’Day landscapes independently or with assistance. Trails will be provided that consider the mobility impaired, vision impaired, elderly, infirm, and people with prams.</p>
<p>② Trails are financially, socially, and environmentally sustainable. Trails have minimal environmental impact and contribute to regional biodiversity. Trails are supported by the local community.</p>	<p>2.1 Continue to monitor the views and feelings of the broader community including MTB riders, walkers, trail runners and local community members and encourage a shared partnership approach across the community (e.g., through open days where local people can walk and explore the MTB trails).</p> <p>2.2 Continue strong partnerships between the Council, Tasmanian Parks and Wildlife Service and Sustainable Timber Tasmania and develop partnerships with landowners to ensure the future of a successful Break O’ Day trail mix.</p> <p>2.3. Ensure detailed environmental investigations are undertaken very early in the planning and development process and contribute to regional biodiversity through restoration of new and existing trail corridors.</p> <p>2.3 Ensure trails are financially, socially and environmentally sustainable to ensure long-term viability with a strong focus on good trail design and sustainability of the assets to reduce costly maintenance of trails and risk.</p> <p>2.4 Leverage existing location and mountain biking, events and adventure sports to encourage the development of St Helens and North East Tasmania as a centre for sport development and expertise.</p>

STRATEGIC PRIORITY		ACTIONS
		<p>2.5 Seek funding through grant opportunities and sponsorship for tourism infrastructure and community health to support the development and maintenance of the Break O' Day Council trail network.</p> <p>2.6 Seek Federal and/or State Government contribution towards maintenance of priority trails to assist in ensuring that these premium products are maintained to the highest level, reflecting that the whole state benefits from the trails not just the local community.</p>
③	Trails provide greater recognition and opportunity for Tasmanian Aboriginal Traditional Owners to engage with their land and living places.	<p>3.1 Explore opportunities with Tasmanian Aboriginal Traditional Owners to further connect to the land and sea and provide opportunities where Aboriginal People are able to visit sites and have access regardless of age or ability.</p> <p>3.2 Seek ways for the Tasmanian Aboriginal community to continue to demonstrate their living culture and impart their knowledge to local people and visitors.</p> <p>3.3 Break O' Day Council to continue to work with the Tasmanian Aboriginal Traditional Owners to ensure connection and protection of the land, sea and sites through consultation, planning and seeking permission and approvals to undertake appropriate future trail development work.</p>
④	Land manager partners, private landowners and community work together to build an accessible trail future across the landscape.	<p>4.1 Progress the Trails Collective Governance model and arrangements, and seek to secure additional public and private resources to uphold service standards and maintain and develop the St Helens MTB Network and priority walking, running and shared-use trails identified within this strategy.</p> <p>4.2 Work with landowners to support long-term sustainable trail access arrangements across their lands for priority trails identified within this strategy.</p> <p>4.3 Encourage greater involvement of the broader community in the Trails Collective Governance arrangements while continuing the strong links to businesses and individual supporters.</p> <p>4.4 Continue monitoring trail use to measure user satisfaction, trail experiences, return on investment, and environmental considerations, and to plan for future investment.</p>
⑤	Trail marketing and promotion activities are coordinated across the region to optimise	<p>5.1 Investigate future air access to St Helens via the existing air strip which would provide a significant fly-in, fly-out opportunity for trail users.</p> <p>5.2 Continue to provide pre-visit and on-site trail visitor information to ensure enjoyment, safety and comfort of visitors for priority trails, and contribute to visitors' and locals' understanding of the limitations and challenges in accessing some</p>

STRATEGIC PRIORITY	ACTIONS
<p>visitor awareness of the trail network</p>	<p>hard-to-get-to trails. Strengthen land manager partnerships' approaches to trail marketing, visitor information and standardised trailheads and waymarking signage.</p> <p>5.3 Promote North East Tasmania and the Break O' Day Council area as the place of mild winters (Tasmania's warmest winter days), with less rain providing the opportunity for more trail use, including walking, in the shoulder seasons and during winter.</p> <p>5.4 Continue positioning, promoting and marketing the mountain bike experience. Encourage appropriate use of the St Helens Mountain Bike Trails and the Bay of Fires Trails through online channels and provide up-to-date information for riders and the community. The information centres at St Helens and within the Fingal Valley continue to provide visitors and the community with excellent pre-visit information.</p> <p>5.5 The Great Eastern Drive between Orford and St Helens is a popular route for visitors and should strongly connect with new and existing short walks and MTB opportunities identified within the Strategy.</p> <p>5.6 Leverage existing successful MTB-specific and other events to encourage new trail events including popular trail running.</p>

1 Introduction



The Break O'Day Recreational Trails Strategy has been prepared to guide and plan for the future development and activation of a network of sustainable trails across the region.

The Strategy will define a vision and future for the recreational trails network and will recommend strategies that provide the very best social, economic, community and environmental benefits. Future trails will provide enjoyable and environmentally and financially sustainable experiences for local people and visitors alike.

To ensure the Strategy reflects the views of the broader Break O'Day community, stakeholders, residents and visitors were provided with the opportunity to contribute via an online survey and four Have Your Say Community Drop-Ins held in Scamander, St Helens, Fingal and St Marys. The survey, held between 11 October and 7 November 2021, attracted 158 responses. The Community Drop In Sessions during October 2021 attracted 36 participants.

1.1 Background

The primary objective of the Break O'Day Recreational Trails Strategy is to guide and encourage the collaborative planning, development and activation of a network of inspiring, connected and sustainable trails within the Break O'Day Council area.

The Strategy's recommendations focus on being strategic, realistic, evidence-based and targeted in a manner that attracts investment and provides enjoyment and clear community benefit.

The Strategy ensures the current and potential contribution of trails is understood and supported by stakeholders across the region, particularly the

principal land managers, Tasmanian Parks and Wildlife Service and Sustainable Timber Tasmania, and that any related infrastructure investment will be well planned, designed for low maintenance, sustainability and to provide maximum benefit.

The use of and demand for trails has increased globally, along with the trend for visitors to have experience-based holidays or breaks and find more authentic and immersive ways to experience places and people.

Trails play an important part in community health and wellbeing by improving the liveability of communities and providing visitors with a reason to visit, stay and invest.

Well targeted and designed trails can also generate significant economic and commercial benefits.

Outdoor active recreation including trail running, walking, mountain biking, use of e-bikes and gravel riding have become increasingly popular ways for people to enjoy and appreciate natural areas.

The Strategy focusses on non-motorised trail activity however the importance of vehicle travel through the *Great Eastern Drive* and exploration of backcountry track by 4WD and trail bikes to access remote walking experiences, including waterfalls, is recognised. Priority trails within the Strategy will, however, be for non-motorised transport.

COVID-19 has made predicting visitor growth and the economy challenging. During 2020, there was unprecedented growth in cycling business, indicated through repairs and bike sales and activity on trails.

The social makeup of Break O' Day and future growth of North East Tasmania have been important considerations in the development of recommendations and reflected in the Strategy's vision, guiding principles, strategies and actions.

The Break O'Day Council is central to Tasmania's East Coast region, offering a range of recreational and visitor experiences across diverse and spectacular landscapes and coastal towns and hamlets. The region stretches 3,809 km² and connects with Mount William National Park in the north, Denison River in the south and Fingal Valley to the west.

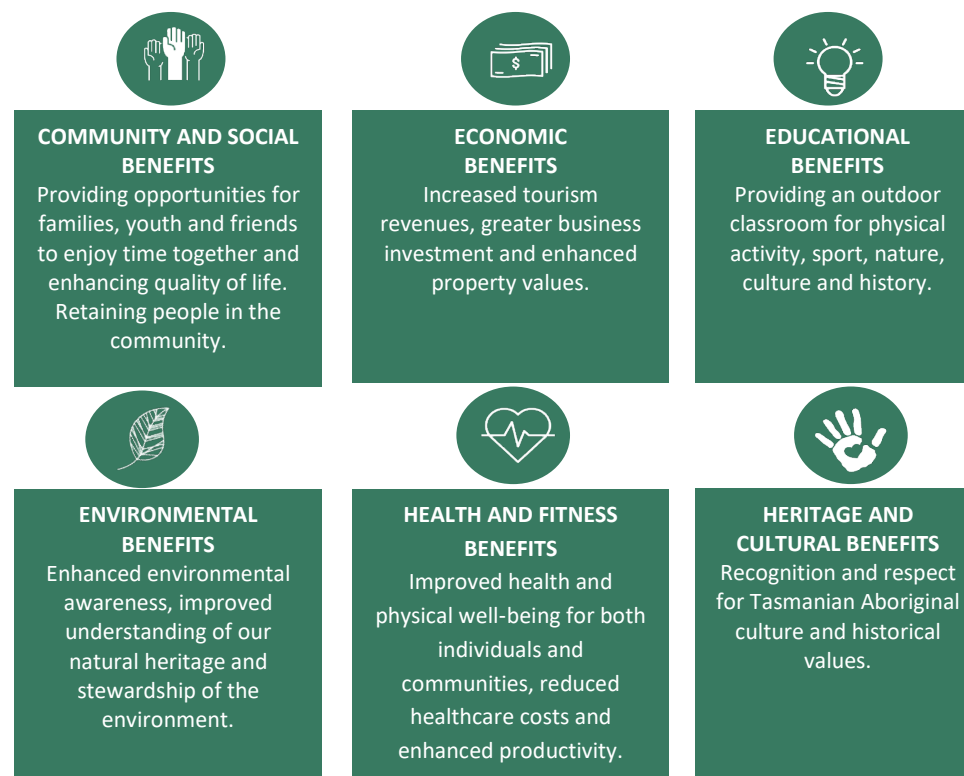
While the region is already well-known for game fishing, the spectacular Larapuna/Bay of Fires, and as a mountain-bike destination of choice, other recreational opportunities and visitor experiences also exist. The region offers a plethora of waterfalls, Indigenous culture and historical experiences, four-wheel driving, bushwalking, surfing, rich agriculture and a vibrant creative arts scene.

To increase awareness and participation in the range of experiences on offer, significant investment has already been made towards recreational trail development throughout the region. This includes a vast network of mountain bike trails and assets, and shared-use paths in St Helens, Scamander and Binalong Bay. There is now a need for a strategic framework to guide the future prioritisation, sustainable network development and management of the region's recreational trails of all types. Break O' Day Council recognises that many of the existing and future trail experiences take place on land managed by Tasmanian Parks and Wildlife Service and Sustainable Timber Tasmania.

The Strategy will support future decision-making and facilitate a network of exceptional recreational trails that provide multiple community benefits and links visitors to the region's natural, cultural and built assets.

- Present a review of all current trails within the Break O'Day Council area including walking, cycling and MTB trails.
- Through public consultation and desktop review, determine current and future community needs and opportunities.
- Undertake an assessment of the economic impacts of regional trails.
- Identify opportunities for future sustainable trail development.

Figure 3. Benefits of trails



1.2 The Break O'Day Destination

The Break O'Day Council area is centrally situated between the Northern and East Coast of Tasmania. The North provides beachside locations and Mount William National Park, the internationally renowned Larapuna/Bay of Fires Conservation Reserve and the Blue Tiers Regional Reserve home of forest giants and epic mountain biking.

The spectacular Fingal Valley features the heritage towns of Fingal and St Marys, Australia's tallest white gums, magnificent waterfalls and spectacular views from the surrounding peaks and ranges. A rich cultural, mining, fishing, forestry and farming heritage can be found throughout the region, with remnants of days past evidenced in the small towns and remembered through a range of tour products, attractions and experiences.

The east coast is fringed with seaside towns, pristine stretches of coastline and the east coast wine trail, complemented with local artisan offerings and ocean fresh 'catch of the day'. The coast also features the largest fishing port on the entire East Coast of Tasmania, exporting to the world, with oyster leases in Georges Bay.

The Break O'Day Council is the local government body covering this 3,809 km² area. The Council is dedicated to providing quality services for the community and visitors while balancing economic development with environmental sustainability.⁷

St Helens is the main township and service hub of the area and the largest town on the northeast coast of Tasmania. By road, travel to St Helens from Launceston is around 166 km (2-hour drive), or from Hobart 252 km (3-hour drive).

In addition to St Helens are the townships of Mathinna, Mangana, Falmouth, Four Mile Creek, Fingal, Cornwall, Pyengana, Weldborough, Binalong Bay, Ansons Bay, Beaumaris, Scamander and St Marys.

Figure 4. Break O'Day Council LGA



⁷ www.bodc.tas.gov.au

1.3 Break O'Day population and demographics

Figure 5. People and communities – Break O'Day Tasmania⁸



6,346 residents
Couples with no children
54% of population



Median weekly household income of \$746



Top Industries
Accommodation 6.4%
Accommodation 8.8% of jobs



Average age of 54
2.8% of population are over 65

Employment



Full time 41.1%
Part time 41.5%
10.9% unemployment which is higher than the State average of 7% and the national average of 6.9%

1.4 Economy

The Break O'Day regional economy accounts for \$310 million in annual gross regional product, a contribution of around 0.9% to the broader Tasmanian economy.

- Agriculture provides an annual value-add of \$62.77 million to the Break O'Day regional economy.
- Accommodation and food/beverage services provide an annual value-add of \$8.31 million to the Break O'Day economy.⁹
- Estimated annual tourism value for the entire East Coast region is \$120.5 million.¹⁰

⁸ ABS Census 2016 Break O'Day Council
Economy.id.com.au - Break O'Day Council

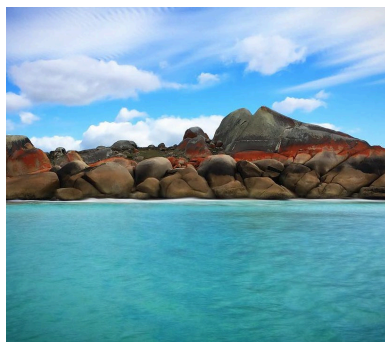
⁹ Economy.id.com.au – Break O'Day Council Tasmania as at June 2020

¹⁰ www.eastcoasttasmania.com.au

1.5 The Visitor Offer

It's picture-perfect, white sand beaches and open, endless blue horizons. It's places that make you feel like you're the first person to leave a footprint. It's national parks filled with wonders, and seaside towns filled with welcome. It's a gourmet food bowl bursting with the best local fare. But it's much more than that. Here, you can experience one of Australia's greatest road trips— a journey that will lead you to places and moments that you'll never forget.¹¹

The towns and areas presented below identify with a range of experiences.



BAY OF FIRES

The Bay of Fires is known all over the world for its extraordinary clear blue seas, brilliant white beaches and striking orange lichen-cloaked boulders. It inspires a string of superlatives from every person lucky enough to come here, and it's one of the most idyllic holiday destinations imaginable.



ST HELENS

St Helens, the largest township on the east coast, is a classic Tasmanian fishing town, a coastal holiday paradise, the gateway to the Bay of Fires and Binalong Bay, exciting mountain bike trails and one of the very best places to find freshly caught, succulent, east coast fish and seafood. What's not to love?



ST MARYS

The pretty town of St Marys, at the head of the Fingal Valley, is hedged with mountains including St Patricks Head, rain forests, rivers, waterfalls and fertile farmland. Take a drive inland to gain a different perspective on the East Coast and explore St Marys' heritage streetscapes, mountain views and quirky shops and galleries.



SURF COAST

(Scamander, Beaumaris, Falmouth, Four Mile Creek)
The coastline between Bicheno and Beaumaris is known as the Surf Coast— a long, languid collection of beaches and towns that includes some of the best surf spots you'll find anywhere on the island. This is a place to pack your beach gear, disconnect your devices, and surrender to a true coastal holiday experience.



FINGAL

Fingal, established in 1827 as a convict station, lies in the heart of the Fingal Valley. Sheltered between Stacks Bluff to the north and the Eastern Tiers to the south, this is a town of beautifully intact heritage and proud rural traditions.

¹¹ www.eastcoasttasmania.com.au

Break O'Day experience themes

Break O'Day is a diverse area with a range of experiences on offer. These experiences can be broken in to themes which are shown below. For the purpose of this document we will be focusing on Coastal, Nature and Iconic Walks, Aboriginal and Living Places and World Class Mountain Biking. This does not make the other themes less important or mean that they may not be included in future trail development.



COASTAL EXPERIENCES

Fishing, surfing, swimming, beach walking on white sandy beaches, Bay of Fires, sailing, snorkelling, scuba diving, kayaking, whale watching.



NATURE AND ICONIC WALKS

Mt William National Park, Bay of Fires, Evercreech Forest Reserve, mountains, rivers, waterfalls, rainforests, forest giants, wildlife & reptile parks, whale watching



GOURMET FOOD BOWL

Fertile farmland, ocean fresh catch, Oysters, East Coast Wine Trail, gourmet cheese, paddock to plate. Distillery and Brewery at Whitesands and local brewery in St Helens



ABORIGINAL CULTURE AND LIVING PLACES

Bay of Fires and wukalina walks, Aboriginal Culture sharing knowledge. Protection of sites through consultation, planning and seeking permission.



WORLD CLASS MOUNTAIN BIKING

St Helens Mountain Bike trails, Blue Tier



CONVICT AND SETTLEMENT HISTORY

History rooms, Trail of the Tin Dragon museums, Heritage Wall and Walk, Fingal Valley Festival



SOFT ADVENTURE

4WD driving, trail bike riding, golf



CREATIVE GALLERIES AND SHOPS

1.6 Environment and Planning Requirements

Reserve Activity Assessments (RAA)

The Tasmania Parks and Wildlife Service (PWS) is responsible for Tasmania's reserves and for protecting the biophysical and cultural values of reserves.

PWS have developed the Reserve Activity Assessment (RAA) process to guide decisions about appropriate use or development and the management of associated environmental impacts in Tasmania's reserves.

The RAA process is equivalent to an environmental impact assessment process. The RAA process clearly identifies assessments for proposals on land and waters managed by PWS including reserves subject to the *National Parks and Reserve Management Act 2002* or *Crown Lands Act 1976*.

The roles of the PWS in the RAA process are:

- as a proponent for reserve area infrastructure proposals;
- as an assessment process manager for assessment of external proponent proposals and
- as a stakeholder in other agency assessment processes for proposals in or adjacent to reserved areas.

PWS ensures that the reserve area management objectives specified in the *National Parks and Reserves Management Act 2002* and *Nature Conservation Act 2002* or applicable reserve area management plan are addressed in decision making.

*information from the Tasmanian Parks and Wildlife website – www.parks.tas.gov

Land Use Planning and Approvals Act – LUPAA

In Tasmania the key Act for planning processes is the *Land Use Planning and Approvals Act 1993* (LUPAA). The Act is supported by regulations and includes the below - There may be other Acts that also apply depending on the assessment.

- [Land Use Planning and Approvals Act 1993](#)
- [Tasmanian Planning Commission Act 1997](#)
- [National Parks and Reserves Management Act 2002](#)
- [Water Management Act 1999](#)
- [Wellington Park Act 1993](#)
- [State Policies and Projects Act 1993](#)
- Major Infrastructure Development Act 1999

A planning scheme regulates the use, development, protection and conservation of land within a specific geographical area (generally the whole of the local council area).

Generally, planning schemes regulate development by dividing land into specific zones and setting out objectives and development standards for land uses within each zone. For each zone, planning schemes identify land uses and developments that are exempt, permitted, discretionary or prohibited.

For example, a Landscape Protection Zone may have the overall objective of protecting and maintaining landscape values, including flora and fauna and scenery. To protect these values, industrial developments may be prohibited within the zone, agricultural activities may be permitted and commercial developments may be discretionary to allow Council to assess the likely impact of each proposed development. There may also be restrictions within the zone on building heights and a general policy to retain tree and vegetation cover.

*information from www.planning.tas.gov and www.hobartlegal.org.au

2 Strategic Directions



1.7 Summary of Plans, Strategies and Directions

The Break O'Day vision, strategic priorities and future directions are guided by regional and state policy frameworks - these frameworks and community views provide an important context for this Strategy. A selection of the more relevant strategies and plans are summarised here, with more included in Appendix J.

Destination Management Plan DRAFT | JULY 2021

Strategic priorities and actions from the DMP have been identified that are relevant to the development of the Recreational Trails Strategy.

Encourage social, environmental, cultural and economic wellbeing through the visitor economy

- Encourage tourism operators to incorporate a purpose brand element (such as contribution to Tasmanian Aboriginal programs, revegetation, etc.) into their business to allow for regeneration programs that will provide mutual benefits to the operator and the broader community.

Strengthen the East Coast's appeal as a destination

- Refine the regional brand and adopt a singular focused approach to implementation
- Strengthen awareness as year-round destination

Embrace and pursue effective partnerships and collaboration

- Encourage local communities to be ambassadors for the experiences on offer in the region

Invest in experience development to deepen the visitor offering aligned to positioning and pillars

- Investment in new and improved experiences that deliver on brand and positioning pillars (A Year-Round Place to Play; The Uncrowded Coastline; Nature and Culture Abound)
- Tasmanian Aboriginal Tourism and action to commit resources to capacity building and support for the development of First Nations tourism
- Invest in a strong events program that builds on the positioning for the region.

Infrastructure investment

- Pursue investment in Tasman Highway including the Great Eastern Drive the optimum drive journey in Tasmania including road safety improvements, safe stopping points, signage and spectacular lookouts
- Continued investment in natural areas including improvements to facilities in national parks and reserves and access roads to key visitor destinations
- Services infrastructure including ensuring adequate services to enable growth in community and visitors
- Seek investment in priority projects including developing an investment guide for the region – listing key projects, available support and incentives and economic indicators – that can be used as a tool for attracting potential investors
- Digital connectivity including for community and visitors.

Capacity building

- Encourage Tourism businesses to develop their capability including to support operators through program that will enable them to lift the quality of the visitor experience, Health and Safety, their environmental impact, and their marketing, commercial and business acumen.

T21 Action Plan Tasmanian Visitor Economy Strategy¹²

T21 is a partnership agreement between the Tasmanian Government and the Tasmanian tourism industry.

The COVID-19 pandemic has severely impacted our tourism and hospitality sector and while times have been tough, the foundations remain strong.

T21 is focused on rebuilding tourism and hospitality to once again be a valuable contributor to Tasmania's economy, growing jobs for Tasmanians and benefits for regional communities.

- Primary focus areas are Tasmania's natural environment, home-grown festivals and events, drive holidays and road trips, uniquely Tasmanian operators and experiences and playing to Tasmania's creative strengths
- Launching a drive/touring marketing program and associated five Drive Journeys to support regional visitation – the State Government has committed \$1.4 million into the promotion of the new Drive Journeys
- Focus on the New Zealand market
- Promoting hero experiences and focusing on niche markets for those in the Unordinary Adventures Program, focused on passion travel e.g., walking, mountain biking, golf and game and fly fishing
- Encourage Tasmanian Aboriginal people to maintain a program of cultural presentations and workshops with the broader Tasmanian tourism industry
- Support First Nations tourism operators to establish and operate cultural tourism enterprises on country
- Work with the community in ensuring Tasmania's Aboriginal culture and tourism experiences are appropriately and respectfully represented in destination marketing activities
- Accessibility and inclusivity audit of Tasmanian tourism product and experiences. Build capacity and awareness of inclusive tourism, invest in infrastructure to support inclusive access and promote and market Tasmania's inclusive experiences for all.

Break O'Day Strategic Plan 2022-2027

Our Vision – A naturally beautiful environment that speaks to our heart. A diverse and thriving community; a place of opportunity. A place where everyone feels safe, welcome and connected.

Economy

- Tourism – broaden, lengthen and improve the visitor experience through development of attractions and activities; promotion and signage; and great customer service
- Employment – create a variety of jobs that will reduce the seasonality of the local economy and provide ample opportunities for youth to remain in the area.

Environment

- Appropriate development – encourage sensible and sustainable development through sound land-use planning, building and design.
- Enjoying our environment – provide opportunities to access and learn more about our environment and the ways it can be enjoyed in a sustainable manner.

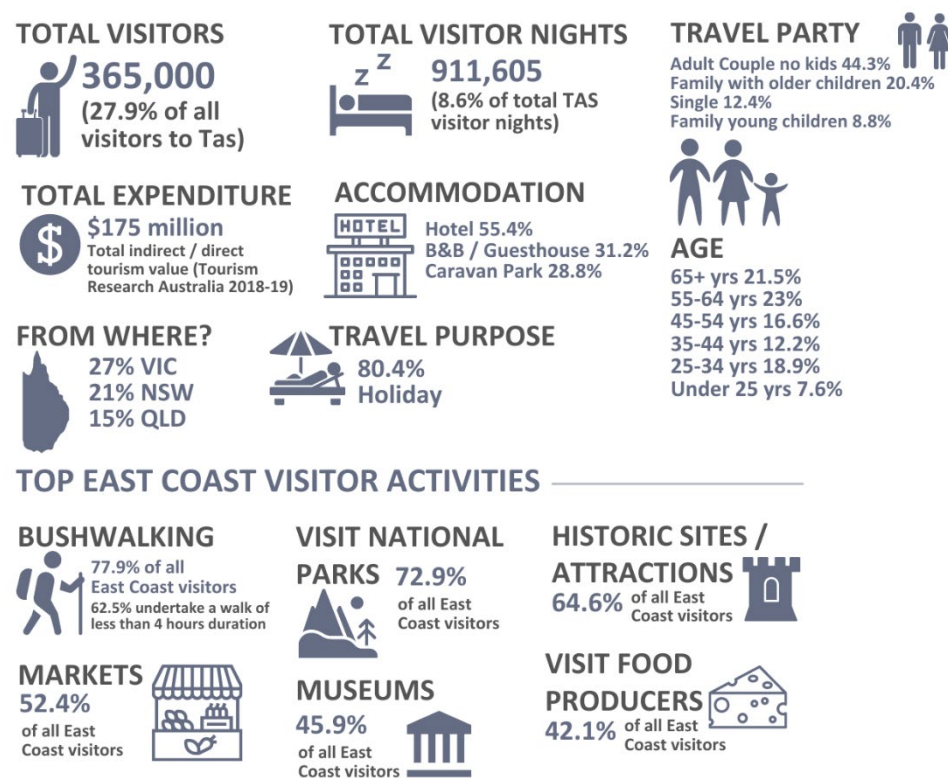
Infrastructure

- Towns – create townships that are vibrant and welcoming through improvements to infrastructure such as, streetscapes, parking, safety and signage
- Community Facilities – provide community facilities that encourage participation and support the lifestyle of residents and growing visitor numbers
- Recreational Facilities – support an outdoor, active and healthy lifestyle for residents and visitors through a range of recreational facilities including walking trails, bike trails and other identified infrastructure.

¹² <https://www.t21.net.au/>

1.8 Tasmanian and Northeast visitors

Figure 6. East Coast visitation at a glance – year ending March 2020¹³



*The significance of mountain biking has not been reflected in this table as the St Helens MTB Network partially opened in November 2019 and was not fully completed until November 2020. The MTB Survey Analysis in Figure 18 below provides a snapshot of the St Helens MTB Market.

The importance of bushwalking to Tasmania's East Coast is reflected here. Northeast Tasmania can leverage this popularity particularly with existing and future short walks that reflect the diverse landscapes.

Table 1. Visitor numbers (Year ending March 2020)¹⁴

Place	Number of visitors
Bay of Fires	177,000
St Helens	172,000
St Marys	83,000
St Columba Falls	40,000
Mt William National Park	25,000
Total Visitors to East Coast	365,124 (up 3.6%)
Total Visitors to Tasmania	1,308,600 (down -1.2%)

¹³ TVS Analyser March 2020, Tourism Research Australia Regional Tourism Satellite Account, East Coast Tasmania 18-19

¹⁴ TVS Analyser, March 2020

1.9 State visitation

To present a story of visitation in Tasmania pre-COVID, a snapshot of past visitor statistics from the year ending March 2020 is presented in this section. For comparison, we have also included a snapshot of year end March 2021 data to observe impacts to the tourism industry. Data has been collated and analysed from Tourism Tasmania, Tourism Research Australia's Satellite Account and the Tasmania Visitor Survey (TVS) Analyser.

Since June 2015, annual visitor numbers to Tasmania have been on the rise, growing from 992,000 annual visitors to a peak of 1.155 million visitors by year end December 2019.¹⁵ The COVID-19 global pandemic has inevitably declined visitor numbers and the overall impact of tourism on Tasmania's visitor economy.

In 2019 – 2020 (compared to 2018-19):

- Total direct and indirect tourism Gross State Product (GSP) was \$3.0 billion – down 18.3%. Tourism-related GSP accounts for 9% of all Tasmanian GSP
- Direct and indirect tourism employment accounted for 37,400 jobs – down 13.5%. Tourism-related employment contributes 15% to all jobs. Despite tourism-related employment experiencing a decline, total state employment increased by 0.5% to 251,000 jobs.

The Tasmanian border was closed to interstate travellers from 19 March 2020 and only opened again to interstate travellers from 'low risk' destinations on 26 October 2020. This had a significant impact on the State's core Victorian and New South Wales markets, with extended travel restrictions for these states until late November 2020, followed by additional closures as further outbreaks occurred. There is some positive recovery with Australians taking more domestic overnight trips in January 2021 than at any time since the start of the pandemic.¹⁷

Nationally in February 2021:

- Domestic overnight trips fell 10% to 6.8 million and spend fell 13% to \$4.1 billion compared with February 2021
- Intrastate travel, however, continued to drive the recovery in domestic overnight travel from the lows of April and May 2020. Intrastate overnight visitors across Australia were up 2% to 5.4 million and spend was up 19% to \$2.7 billion compared with February 2020.

Tasmania in February 2021:

- Welcomed a total of 223,000 overnight visitors (interstate and intrastate), a decrease of 12% compared with February 2020
- Catered for just over 1 million visitor nights, a 14% decrease from February 2020
- Received \$195 million in visitor expenditure, a decrease of 14% compared with February 2020
- Intrastate visitors numbered 135,000, an increase of 14%. They stayed a total of 280,000 nights away from home, a decrease of 35% and spent \$52 million, a decrease of 22% from February 2020.

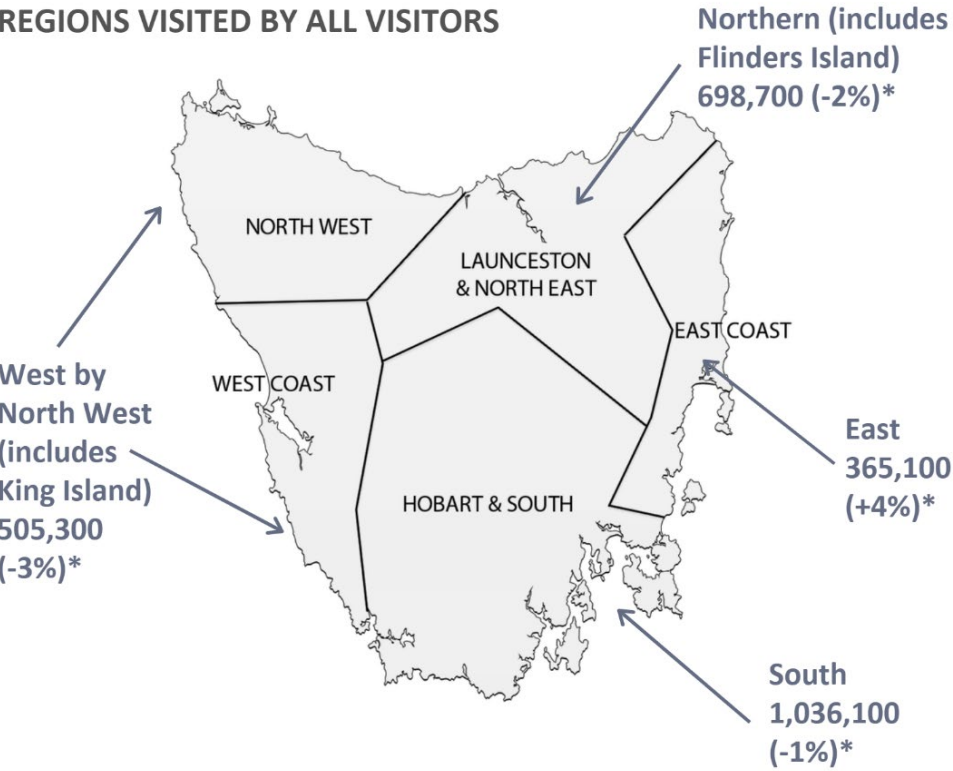
¹⁵ TVS Analyser, Tasmanian visitor data year end March 2020

¹⁶ Tourism Research Australia – Satellite Account Tasmania 2019-2020

¹⁷ Tourism Research Australia – National Visitor Survey Monthly Snapshot January 2021

¹⁸ Tourism Research Australia – National Visitor Survey, monthly domestic overnight visitation February 2021

Figure 7. For comparison, visitors across all Tasmanian regions, year end March 2020¹⁹



*Year on Year changes from March 2019

¹⁹ TVS Analyser, March 2020



3 The Trails Market



1.10 Trail use markets in Australia

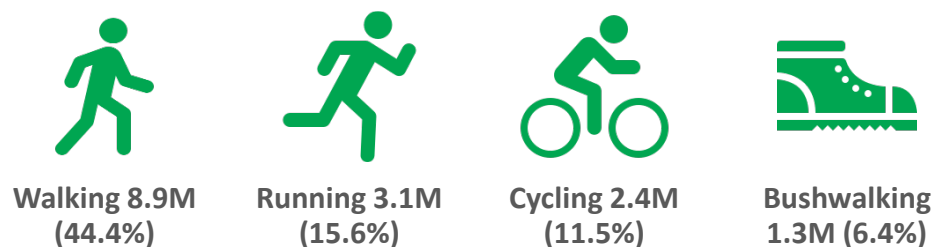
Trails cover a broad range of markets and activities:

- walking
- bushwalking
- cycling
- mountain biking
- horse riding
- snorkelling, diving, kayaking and boating
- trail running
- drive and 4WD trails, and any other active or recreational activity that occurs on a trail.

Accessible trails are also an important consideration in planning trail experiences, providing access for all.

The top trail-based participation by Australians according to 2020 national data is included in Figure 9.

Figure 8. Top trail-related sports and recreation activities per Australian participant²⁰



The walking market in Australia is the most popular, and is still growing.

Within that market there are numerous pieces of the walking jigsaw:

- short walks
- day walks
- self-guided and supported
- self-guided but not supported
- guided and luxury small group guided journeys.

²⁰ Ausplay National Participation Survey 2020 – Top sports and activities

1.11 Future travel related trends

Recent travel trends in light of continued international border restrictions and COVID safe protocols and strategic lockdowns include:

- **Ticking off the backyard bucket list** – There is a tendency among young Australians (Millennials) to travel overseas in their younger years and wait until they have a family or even until retirement before taking the time to really explore Australia. The pandemic may force this trend to be reversed. Destinations and operators should think of creative ways to get onto the bucket list for customer segments they may not have invested in prior to the pandemic, making now the time to explore those undiscovered destinations.
- **Romancing with the great Aussie road trip** – The number of recreational vehicles (campers, caravans and motorhomes) registered rose by 16.5 per cent in the June quarter of 2020. Families and grey nomads have traditionally been the most passionate road-trippers, however, the profile of the road tripper in 2021 may include more young professionals, older families, cruise enthusiasts and backpackers who would otherwise be overseas. It will be important to have services and activities suitable to these broader customer groups and to tailor and funnel marketing spend to speak to their needs and interests.
- **Regenerative travel** – Following the turbulence of 2020, the desire to use travel as a moment to reconnect and regenerate will dominate in 2021. Soft adventure experiences like multi-day walks and wellness travel (i.e., spa holidays, yoga retreats) have been growing in popularity over the past few years, and the pandemic has only amplified the desire for this style of holiday. Destinations and experiences that leave travellers feeling calm and rejuvenated—whether it's an all-inclusive multi-day hike or an off-grid eco-cabin stay—are expected to be popular with travellers.²¹
- **Adventure and nature-based tourism** – With people craving wide-open spaces, fresh air and nature more than ever, Australia's nature will be more desirable in years to come. Tourism Australia's most recent consumer research, called the Consumer Demand Project, demonstrates that destinations with wide-open spaces feel safer for travellers—and, after spending more time at home last year, people are developing a new appreciation for being out in nature. Forecast to become a \$1.3T global tourism segment by 2023, according to the US based Adventure Travel Trade Association, nature-based tourism sectors gathering traction with audiences include:
 - Glamping and luxury tented accommodation in unique and spectacular locations
 - Repurposing of heritage, industrial and buildings and farm sheds
 - Short walks and interpretive experiences, cycling, mountain biking in nature, and wellness experiences that speak to the improvement of mind, body and spirit.²²
- **Caravan and camping:** Accounting for 44% of all holiday nights across Australia, the latest insights from Tourism Research Australia for the September 2020 quarter showed that caravan and camping was the most popular holiday accommodation type for Australians. The strong recovery of this sector saw over **1.9 million** caravan and camping holidays undertaken by Australians nationally, creating **8.4 million nights** for the September Quarter 2020 alone.²³
- **International travel:** Australia's previous barriers of 'distance' and 'travel time' are now our biggest drawcards. Australia is currently number one on the list of desired international travel destinations, and our wide-open spaces and remote attractions are highly prized.²⁴

²¹ <https://www.luxurytraveladvisor.com/australia-new-zealand/tourism-australia-predicts-top-global-travel-trends-for-2021>

²² <https://getwherewolf.com/adventure-tourism-predictions-for-2021/>

²³ <https://www.caravanindustry.com.au/caravan-camping-critical-to-domestic-tourism-and-regional-australia-recovery-based-on-latest-figures>

²⁴ Tourism Australia presentation – Australian Regional Tourism Convention October 2020

Tasmanian Drive Journeys

Tasmania has recently launched five Tasmanian Drive Journeys to encourage visitors to stay longer and spend more in regional communities. 'The Great Eastern Drive' currently features East Coast trails, including Blue Tier MTB trails, St Columba Falls, St Helens MTB trails and Bay of Fires. There is the opportunity in the future for further trails in the region to be highlighted in this drive, including the trails of Fingal, St Marys and the ranges surrounding the valley.

Figure 9. Great Eastern Drive journey



1.12 Break O' Day future directions

The future directions for the Break O' Day trail network are guided by strategies, global trends and community views.

1.13 Mountain biking

Mountain biking

Recent estimates on mountain bike participation suggest that around one million Australians engage in mountain biking activity, ranging from beginner through to competition level.²⁵

Other relevant data includes:

- 32% of the adult Australian population have already incorporated a mountain bike experience in a holiday.²⁶
- The national representative body, Mountain Bike Australia (MTBA now part of AUS Cycling) has a reported membership of 18,000, a growth of 59.7% in five years. MTBA represents 166 clubs Australia-wide.²⁷
- Most MTB riders travel with their partner and children, except for advanced competition riders who ride equally with one other person OR in a group of 3-5 people.
- Amid the global pandemic, the demand for mountain biking was unprecedented. The global market estimated a whopping 44.2 million 'mountain bike units' were sold during 2020, forecast to rise to 78.5 million by 2027.²⁸

- Top reasons for undertaking an MTB experience is for health and fitness, being outside in the open air, sightseeing, relaxation, recreation and socialisation – elements in strong demand post COVID-19 lockdowns.
- Mountain Biking is an activity with increasing participation rates worldwide. Mountain Biking encompasses a broad spectrum of activities ranging from international level competition and extreme events to school sport programs and recreational riding.
- Mountain biking can be undertaken across a range of settings, however, it is most commonly recognised as riding specialised bikes on dedicated off-road trails.
- Traditionally riders have sought to ride single-track trails which enable riders to connect with the landscape and be challenged through varying levels of technical difficulty. More recently there has been a tendency towards flow and gravity trails that provide an increased level of speed and technical features.

A full description of Mountain Bike Trail types and descriptions can be found in Appendix A.

²⁵ Warburton Mountain Bike Destination 2019 – Instinct and Reason

²⁶ Warburton Mountain Bike Destination 2019 – Instinct and Reason

²⁷ MTBA Annual Report 2020

²⁸ Global Mountain Bike Industry (2020 to 2027) - Market Trajectory & Analytics, Research and Markets, October 2020

Blue Derby

The Blue Derby MTB network attracts over 30,000 visitors to the region each year who stay an average of 4–5 nights. Homes which once sold for \$30,000 are now selling for \$300,000. Old businesses are flourishing and new businesses continue to emerge. In addition to an epic riding experience, riders and their families and friends are attracted by the incredible nature, breweries and vineyards, fishing charters, floating saunas, farm gates, waterfalls and national parks, lavender farms, quad biking and tours. Add to this the cafes, pubs and restaurants, a range of accommodation from short stay through to cabins, huts, pubs and lodges, guided multi-day tours with participants staying in luxury ‘pods’ along the trail, shuttle buses, bike hire, equipment sales and repairs. The Blue Derby has also hosted the Enduro World Series, the first Australian destination to do so, where it was voted by Enduro riding participants as the best trail across the World Series two years in a row. This has all resulted in an estimated economic impact for the region of between \$15 and \$18 million dollars.²⁹

Different mountain bike markets

The activity patterns and needs of the Australian market as described in Table 1 can be broadly divided into:

- core riders (technical, endurance and allrounders)
- non-core riders (leisure riders).

Mountain bikers are generally categorised in either the riding genre (all-mountain, cross country, downhill) and/or by their ability (e.g., beginner, intermediate, advanced) and riders look for trails that suit their skills, abilities and challenges sought.

Mountain Bike Australia (now AusCycling) revised the Mountain Bike Trail Difficulty Rating System based on the International Mountain Bike Association and grades trails according to their relative technical difficulty. They have also developed a table of MTB trail types and descriptions (see Appendix A).

Through the consultation process with stakeholders, monitoring and through the MTB Online Survey (see Figure 10 below) it is evident Break O’Day local users and future visitors fit across the range of core and non-core MTB riders. They cover the leisure, enthusiast types with a growing interest in gravity, technical and flow trails, however, there is still strong demand for more green and blue trails.

²⁹ www.ridebluederby.com.au, www.abc.net.au/news www.rdatamanias.org.au

Different needs

Mountain bike markets can be further separated into the categories of local, domestic and international visitors, to gain an understanding of the needs and expectations of each.

The cycle tourist is much more likely to undertake a range of other activities compared to non-cycle tourists, explaining why the cycle tourist's average spend is much higher than non-cycle tourists. Of interest is their tendency to eat at restaurants, go to licensed venues and go shopping; all activities which would benefit the economy of Break O'Day.

Single-use and shared trails

Single use trails are developed for and used solely by a single users group, particularly in mountain biking, where design and construction can allow for challenges not suitable for other users. Single-use trails, often referred to as single-track trails need to be clearly identified to ensure the very best experiences are had by all users and to avoid conflict.

Shared trails generally include any trails that can be used by more than one user group. Within the context of the Strategy, users include mountain bikers, trail runners, walkers and in some cases horse riders. Responsible mountain biking is generally compatible with other trail users and can help build relationships with other users.

Mountain biking participation

In the past few years there has been significant advances in mountain bike technology, which is redefining the type of experience desired by riders. Australian, New Zealand and international bike industry reports indicate that many of these mountain-bike trends have continued and have in fact increased.

Electric and power assisted bikes (e-bikes) represent one of the fastest growing segments of the bike industry, as they allow riders to extend their cycling distances. E-bikes help in overcoming hilly terrain or lack of fitness, can assist in rehabilitation after injury or illness, and are a cost-effective and green transport solution. They also improve trail accessibility for older riders who can access areas and ride trails that they would not normally be able to.

Australian e-bike sales have just recorded their fourth consecutive year of rapid growth. For the 2019–20 financial year sales were 48,000 units, up almost 50% from 32,500 units sold in 2018–19. Using a \$3,000 average retail sale price estimate would mean \$216 million in annual retail sales this current 2020–21 financial year for a product category that virtually didn't exist in Australia five years ago and is only set for further development and growth.³⁰

Data compiled by Sport Australia as part of the AusPlay survey estimates that approximately 341,900 Australians participate in mountain biking (approximately 1.6 per cent of the population). The data found that participation is generally skewed towards males, and that generally participation is casual and non-organised (rather than through an organisation or at a specific venue).

In terms of growth, the AusPlay report indicates that mountain biking has a market opportunity to grow considerably.

³⁰ Latz Report May 2020

Mountain biking was the sixth most popular recreational activity across Australia which adults participated in more during the April to June 2020 COVID-19 lockdown. These activities, particularly those that can be done solo or physically distanced, were more immune to COVID-19 disruption.³¹

COVID-19 has made predicting visitor growth and the economy challenging. During April and May 2020 there was unprecedented growth in cycling business both through repairs and bike sales.

“Families are buying bikes and hitting the cycle paths in hordes. Gravel bikes, touring bikes and adventure bikes are in great demand”.³²

There is rapid interest in cycling of all types through investment in off-road cycling experiences. Consumers who have taken up cycling amidst social distancing may not continue, particularly with increasing traffic as the world returns to ‘normal’.

Overnight trips in Australia involving nature and other outdoor activities fared better than those involving arts and heritage and/or social activities in June quarter 2020.³³

The increased demand in cycling can be traced to existing cyclists upgrading their equipment and newcomers. The sales for the newcomers will create a new demand that otherwise would not have happened prior to the COVID-19 disruption.

Government investment in bike infrastructure is also creating and supporting more demand for bikes and equipment.

Figure 10. Activity patterns and needs of the Australian market



³¹ Early impact of COVID-19 on sport and physical activity participation (AusPlay, October 2020)

³²³² Latz Report May 2020

³³ Tourism Research Australia - National Visitor Survey Results June 2020 - Year ending June 2020



1.14 Hiking

Introduction

Enjoying a recreational trail on foot varies from leisurely strolls to a more intense and strenuous hike or trail run through rugged terrain. Walking or running can be done for commuting or exercising in urban areas or in national parks and reserves, offering overnight and multi-day experiences. Walkers completing a more remote activity are generally looking to immerse in nature or challenge themselves on an adventure hike.

Bushwalking

- Bushwalking is currently rated in sixth position of the top 20 sports and physical activities undertaken by Australians.
- 1.3 million Australian adults (6.4% of the adult population) and 21,000 children participate in bushwalking activities annually, with 18% of participants undertaking bushwalking activities at least once per week.
- Peak participation age for men is 55–64 years and for women is 25–34 years.
- 50% of Australian bushwalking participants walk for 3 hours or more on average.
- Top reasons to participate in bushwalking are to be outdoors and enjoy nature, for fun and enjoyment and for physical health and fitness.
- Tasmanians have the highest rate of participation in bushwalking nationally, with 10.9% or 47,372 adult participants annually.³⁴

³⁴ Ausplay National Sports and Physical Activity survey, Bushwalking Participation December 2020

³⁵ Ausplay Participation Trends since 2001

Recreational walking

- Recreational walking is currently rated in first place of the top 20 sports and physical activities undertaken by Australians.
- 8.9 million Australian adults (44.4% of the adult population) and 18,900 children participate in recreational walking activities annually, with 91% of participants undertaking recreational walking activities at least once per week.
- Peak participation is by women 65+ years (closed followed by women 55-64 years) and men over 65 years of age.
- On average, majority of walkers spend 62 minutes on each walking occasion.
- The top reason to participate in recreational walking is physical health and fitness (73% of participants).
- Since 2001, the participation in recreational walking by Australians has increased by 14.4%.³⁵
- Tasmanians have the highest rate of participation in recreational walking nationally, with 49.6% or 214,586 adult participants annually.³⁶
- From an international perspective, international visitors engaging in bushwalking and rainforest walks increased by 7% to 1.9 million per annum (2018).

³⁶ Ausplay National Sports and Physical Activity survey, Recreational Walking Participation December 2020

Figure 11. What bushwalkers are seeking

Iconic Walks

An iconic walk is a personal adventure, an achievable challenge that creates an overwhelming feeling of reward.

When people search the world for iconic walks, they consider one or more of these

common characteristics:

- diverse landscapes, often mountainous, coastal, pristine, beautiful, dramatic
- contact with locals, and local history and culture, including built animal encounters
- uncrowded
- length varying from tens to hundreds of kilometres, including optional side trips and sections.

For backcountry longer walks,

people value:

- landscape variety
- solitude
- pristine environment
- adventure
- effort versus reward
- escape
- own pace (for some).

Popular shorter walks

often include:

- landscape variety
- history
- effort versus reward
- uncrowded track
- comfort somewhere (during and/or at the end).

SOURCE: PWS, 2018 as cited in Tasmania's Next Iconic Walk Feasibility Study: Final Report, 23 July 2021 (Version 14) (SGS Economics and Planning)

Considerations for the development of future walking trails

In the Tasmanian Parks and Wildlife Service (PWS) **Tasmania's Next Iconic Walk Feasibility Study** (summarised in Appendix B Case Study) walking trail tourism operators were asked which walking options they would prefer in terms of building their own business and the potential flow-on effects for local towns. A range of comments were received that are useful for Break O' Day future trail experiences:

- the journey is important
- build a really good track, take advantage of every viewpoint
- high quality and comfortable accommodation will work best in cold and wet conditions
- the length of the walk will matter but if the purpose is not to just come, do the walk and go, the destination rather than the walk characteristics are critical
- the issue with longer trips is that guests are bussed in, do the trip, and then bussed out; locals benefit little from the 'iconic' profile of the walk
- currently, the five-day walks are slightly more popular [with their clients] and those visitors are searching for experiences
- build trails and facilities that cater for groups
- better to build an iconic short walk that can be built into existing tour packages, but creates extra nights
- degradation of the landscape needs to be considered – how will the PWS keep walkers on track as they can easily wander off in many places and create new paths and eyesores?

Importantly, the increasing social licence issues around commercialisation and built infrastructure within parks has also created wariness by some operators.

Stakeholders explicitly noted the need to keep Tasmania's walking reputation strong, and disagreed with models including development of private huts, specifically noting they did not want this to occur on a new walk.

Visitor research and records (PWS) and surveys (Tourism Tasmania) show that the majority of bushwalkers avoid the West Coast and sub-alpine areas in cold seasons; for example, on the Overland Track in October (2017) there were 369 walkers. This rises to the peak in December–January, with an average of 1,025 walkers a month, and drops to 76 in May (PWS, 2020).³⁷

North East Tasmania and the Break O' Day Council area is recognised for its mild winters, with warmer winter days and less rain providing opportunity for more walking in shoulder seasons and during winter.

Trail running

Categorised as a form of 'hiking', trail running is one of the world's fastest growing sports. Since the mid-1990s, popularity of trail running has grown at a rate of 15% each year. A report into trail running in NSW in 2013 showed a 521% increase in event-based participation over three years 2010-2013.³⁸ It is broadly recognised and reported by the trail running sector that growth has further increased significantly since that time.

Trail running events are also becoming increasingly popular worldwide, including in Tasmania, with more events and increasing numbers of participants consistently reported over the past decade. In Tasmania races frequently sell out and attract mainland and international entrants.

³⁷ Tasmania's Next Iconic Walk Feasibility Study Tasmania Parks and Wildlife Service 2021

³⁸ <https://www.worldathletics.org/disciplines/trail-running/trail-running>

1.15 Target markets

Two target market categories have been established by Tourism Tasmania on the back of COVID-19, these are:



Raw Urbanites

Seek connection through their experiences, actively engage with products that deliver escape, a back-to-basics approach and a reconnection with self, nature and others.



Erudites

Are inspired by knowledge and culture, seek out learning experiences and those that challenge. They seek to step back and reflect, refresh and renew their own view of self and the world.

Each of these market categories are desiring experiences that Tasmania and Break O' Day can offer – particularly the inspiration through knowledge and culture. Raw Urbanites are more likely to undertake a West Coast experience, seeking to travel into remote regions on longer holidays, looking to disconnect from stresses and re-connect with nature, themselves and loved ones.

Erudites, however, are likely to undertake shorter destination-based trips and will seek experiences to learn about a destinations history, culture and nature which the East Coast can provide. Erudites will also be seeking higher value experiences that include quality food and beverage experiences emerging experiences in Break O'Day.

International markets

Tasmania's target international customers are High Value Travellers who are more likely to invest in communities, as well as those who will seek a rich experience from their travel destination. This includes communities in North America, Continental Europe, United Kingdom, Singapore, Hong Kong, China and New Zealand. Although these markets will take time to recover, focus was placed on the New Zealand flights with direct international flights early, as part of the trans-Tasman travel bubble which commenced in April 2021. Tourism Tasmania will need to continue to engage with priority international markets and prepare for scenarios as travel restrictions lift.

Local Trail Users and Markets

Local people are a particularly important user group as reflected in the recent Break O' Day Recreational Trails Online Survey and Community Drop In Sessions. The ability for local people to participate and be active on trails that suit their interests and abilities is important for community enjoyment and community wellbeing.

Further examples of Tasmanian perspectives on trails are found in Table 1 over page.



Table 1. Tasmanian Trail Markets and Perspectives

TASMANIAN TRAIL USERS	USER PERSPECTIVES
Local East Coast residents	<p>The Break O’ Day Council through their 10 year Strategic Plan 2017-2027 committed to broadening visitor experiences, length of stay and spend, supporting new sustainable employment opportunities for local people, facilitating opportunities for people to enjoy and protect the natural environment and providing suitable infrastructure that encourages healthy outdoor lifestyles.</p> <p>The Plan also seeks to ensure local people have ease of access to community walking trails and facilities for their own physical and social wellbeing. These obligations are also linked to the Council commitment to facilitate new business opportunities and development, investment and employment to support the continued liveability and quality lifestyle for residents within Break O’Day communities.</p>
Tasmanians – intrastate	<p>National data collections such as the Australian Bureau of Statistics reflect the strong participation by Tasmanians in bushwalking and recreational walking, currently ranked number one in Australia.</p> <p>Intrastate visitors may travel for a weekend getaway or a day trip and seek to undertake a favourite walk or bike ride, a walk they have never done before, or an opportunity for a break and ‘leg stretch’ on a drive journey.</p>
Tasmanian bushwalking groups/clubs	<p>Bushwalking Tasmania represents nine clubs located around the State – Blandfordia Alpine, Circular Head Walking Club Inc., Deloraine Walking Club, Easter Shore Ramblers, Hobart Walking Club, Launceston Ramblers Club, Launceston Walking Club, North-West Walking Club and the Pandani Bushwalking Club. Club members will undertake both short and multi-day walking experiences within their own region and also travel to undertake walks in other regions. This can include walks along iconic trails and seldom used tracks such as ridge top or mountain summit walks.</p>
Mountain bikers (independent), clubs and event participants	<p>The region already supports the annual Dragon Trail race, a three-day event that connects trails in Derby with St Helens and the Bay of Fires. In addition, Blue Derby also hosts a range of events including a round of the Enduro World Series planned in April 2023. As mountain bikers often travel with family and friends who may be non-participants, this is an opportunity for Break O’Day to capitalise from and cater for these markets by encouraging visitors to disperse further into the region.</p> <p>There are also several MTB clubs across Tasmania, who undertake short intrastate travel for weekend experiences.</p>
Overnight guided walking experiences	<p>Guided and self-guided accommodated walks are one of the fastest growing tourism products in Australia and other international destinations. Pre-COVID it was estimated that around 200,000 Australians participate in annual high-end extended or multi-night walks overseas, only 40,000 of them do these walks within Australia. There will be greater demand by Australians to participate in these experiences within their own countries while the ability to do so overseas is limited.</p> <p>The ‘Great Walks’ signature brand will also continue to grow on this opportunity, with the Bay of Fires already represented within this suite of walking experiences. Pre-COVID demand showed that many of the Great Walks products operated at or near 100% capacity, especially during peak periods.³⁹</p>
Tour operators	<p>Within the East Coast region, there are tour operators who are already including trail experiences in day-tour itineraries. In addition, there are several multi-day tour operators, who in addition to visiting iconic attractions will also undertake short day-walk experiences within their itineraries. Many of these will be within national parks, with operators required to have Commercial Tour Operator permits to conduct activities such as walking within park reserves.</p>

³⁹ Commercially confidential discussions with industry specialists

1.16 Needs of trail visitors and locals

Break O'Day boasts a myriad of tracks, trails and shared pathways used by a variety of trail users including walkers, hikers, trail runners, cyclists (on and off road) and horse riders. While motorised recreation users including motor-cross (dirt bike) riders and 4WD drivers will not be included in the Strategy, their needs are often connected, and at times can create conflict as similar tracks and trails or locations are used.

Each of the user groups, or trail markets, has experience needs. Aligning these to the target markets being sought by Break O'Day Council will provide a product strength for the region. The following table describes the market group and experience needs.

Table 2. Table of users and their experience needs and preferences

MARKET	DESCRIPTION	EXPERIENCE NEEDS AND PREFERENCES
Walkers and Hikers	<p>Wide range of users and ability levels including people using trails for exercise, relaxation and leisure activities, or to immerse themselves in nature.</p> <p>Some groups using shared trails, rail trails and local paths, some seeking nature and adventure experiences in the region's outstanding scenery and visitor attractions.</p>	<ul style="list-style-type: none"> • Safe short trails for daily use. • Loop trails that return and provide simple logistics. • A range of access trails across all-abilities. • Short to long trails for leisure activities both close to town centres and within easy travel from accommodation. Appealing feature nodes (i.e., waterfalls, viewpoints, historical markers) and desirable destinations including spas and wineries. Linked to nearby activities, attractions. • Short to long trails in a variety of locations at a range of distances, including multiday with on-trail accommodation and links to pick up drop off (Base Camp) options. • Accessible trailheads with adequate parking and facilities including toilets. • Immersive trails that seek 'wilderness' experiences (even if remaining nearby safety of population centres). • Challenge (ascent) trails for fitness, health and wellbeing.
Trail Runners	<p>People running on trails for exercise, training for events and for adventure.</p>	<ul style="list-style-type: none"> • Range of short and long trails in and near town areas, parks and reserves, and along river corridors. • Challenging ascent and/or technical backcountry trails for extended running. • Connected trails suitable for running events into the future. • Range of participative and competitive trail running events.
Road Cyclists	<p>Generally, people riding for fitness and social interaction with like-minded cyclists.</p> <p>Road riders</p>	<ul style="list-style-type: none"> • Ride on road as individuals or in groups. • Safer roads and road verges – this group generally does not ride on trails. • Smoother surfaced roads catering for expensive road bikes with narrow tyres.

MARKET	DESCRIPTION	EXPERIENCE NEEDS AND PREFERENCES
	<p>Backcountry riders</p> <p>Gravel grind riders</p>	<ul style="list-style-type: none"> • Adequate distance between coffee and food stops that varies between 20 and 40 kms. • Backcountry routes on dirt roads with less traffic, can be on rail trails and less often singletrack; seeking views, nature-based environments, routes linking townships and attractions; 50–100km/day; often multiday routes. • Gravel-grind routes with strong ascent (hill climb) profile on dirt/gravel roads, can be on rail trails; linking or looping from townships; nature based experience; 100km–200km/day; single day routes.
Leisure Cyclists	<p>Wide range of users and ability levels including people cycling for exercise, commuting, relaxation and leisure activities and touring.</p> <p>This group generally includes ‘road riders’ and families or couples travelling.</p> <p>Can include backcountry and gravel grind sub-groups.</p>	<ul style="list-style-type: none"> • Safe and comfortable cycling on shared use trails for daily use. • Short to long cycle trails for leisure use both close to population centres and at visitor hubs within easy weekend travel from home. Appealing destinations. Linked or nearby activities, attractions and accommodation such as wineries, cafes and good food. • Some may require bike hire or transport services with accessible trailheads with adequate parking and facilities.
Mountain Bikers Use of purpose-built mountain bikes on purpose-built trails, shared trails or other off-road trails.	<p>Children and families seeking a safe entry level or skills development experience.</p> <p>Riders in the young adult to middle age groups.</p> <p>Experienced local riders who have ridden for many years in the region, and who continue to contribute to the trail network through building, maintenance and other activities.</p>	<ul style="list-style-type: none"> • Trails and bike parks accessible from population centres and together offering a range of trail types in unique settings and well maintained. • Inter-connected trail networks offering a range of difficulty levels and technical challenges. Ideally offering at least a day’s riding. • Skills parks and technical trails. • Participative and competitive events. • Trailheads with appropriate facilities, including car parking, bike wash-down, food and bike services and shuttle transport. • A range of trails accessible for shorter 1 to 4-hour rides near places of work and living. • Trails for the local user market and national and international mountain bike travellers who visit for longer weekend breaks and short and extended holidays. • Some feature rides that might include long descents, well designed and constructed features, outstanding scenery and features. • Diversity of offerings including improvements based on experience monitoring and rider input.

MARKET	DESCRIPTION	EXPERIENCE NEEDS AND PREFERENCES
Horse Riders	<p>Likely to be members of local horse-riding clubs.</p> <p>Independent riders riding with family groups or other friends.</p>	<ul style="list-style-type: none"> • Bridle trails accessible from horse agistment areas/equestrian centres or with adequate horse trailer parking and unloading facilities.
General Visitors	<p>People on a holiday or visiting friends and relations (VFR).</p> <p>Short easy to access trails near the main towns and a range of trail experiences that present unique North East Tasmanian landscapes and settings.</p>	<ul style="list-style-type: none"> • Trails of different types to or at points of interest suited to a range of interests (environmental, geological, historical, cultural) and abilities. • Something different to do while on holiday. • Equipment and bike hire. • Short-guided tours with interpretation. • Easily available information and packaged tours/product to provide the experience in an easily accessible way. • Picnic and toilet facilities close to the trail so that the stop can be an enjoyable one and made easy for them.
Aquatic Trails	<p>Sea kayaking and river and lake kayaking and boating.</p> <p>Underwater dive trails including snorkelling and SCUBA.</p>	<ul style="list-style-type: none"> • Unique experiences that suit skill and ability levels, often not defined trails but routes identified that visitors can identify with. • Access and egress points for loop or linear trails or aquatic experiences with some camp sites identified. • Information regarding local tides, weather condition and open water sections for potential route identification.
Rock Climbing, Abseiling	<p>Rock climbing short sport routes and bouldering to wilderness adventure climbs.</p> <p>The dolerite 200m Bare Rock face at Fingal is fast becoming one of Tasmania's great climbing experiences.</p>	<ul style="list-style-type: none"> • Diversity of climbs across a range of rock types including faces and columns with some bolted edges and ridges. • Climbers seek to camp and socialise with other climbers close to the rock faces. • Climbers and family and friends often seek other opportunities such as walking trails within the area. • Climbers are attracted to localities and work closely with local people and land managers to ensure safe and long-term access to climbing sites.

Source: TRC Tourism 2021

Marketing campaigns

In accordance with the T21 Visitor Economy Action Plan 2020-22 Tourism Tasmania has commenced a range of marketing campaigns and programs to cater for target markets⁴⁰ which the Break O' Day Trails can leverage:

- **Make Yourself at Home** – encourages Tasmanians to travel around their own backyards on day trips, weekend getaways and longer. By exploring their own state, Tasmanians can support the local tourism and hospitality industry.
- **Tasmania – Come Down for Air** – this program has been launched to both the broader Australian domestic market and recently the New Zealand market. Australians are invited to 'come down for air' to escape the everyday stresses and routine, to create 'calm in the chaos', to connect with the self and to feel more human on an island of difference. For New Zealanders, it is acknowledged that many refer to Tasmania as 'Australia's New Zealand', the campaign aims to showcase Tasmania's points of difference – a safe destination that boasts incomparable wildlife, heritage and history, walking tracks and food and beverage.
- **Unordinary Adventures** – the program has been designed to encourage regional dispersal by targeting specific visitor passions. Presently, these include walking, golf, fly fishing and mountain biking. The 'unordinary' point of difference for each activity is articulated, with the potential for niche passions to collaborate with Tourism Australia's Signature Experience Program in the future. Tasmania's aim is to hold the reputation for world-class offerings in each of these activities, while further catering for and attracting visitors with complementary unique Tasmanian experiences and character.⁴¹

⁴⁰ <https://www.tourismtasmania.com.au/news/category/tourism-tasmania/t21-visitor-economy-action-plan-2020-22>

Importance of accessibility for all

Accessibility for all is about providing services and opportunities for people with a range of disabilities which may include mobility, mental health, cognitive, visual or hearing impairments. Accessible trails can also be for different visitor demographics such as young families or baby stroller use. The recent Break O' Day Community Recreational Trails Survey strongly identified the importance of providing accessibility for a wide range of people.

Many governments have committed to addressing shortfalls in accessibility through National Disability Strategies and Discrimination legislation. Where appropriate, providing trails and/or trail services that cater for a range of accessibility needs creates opportunities for local people, value-adds, and enhanced experiences for people with disabilities and those they are travelling with.

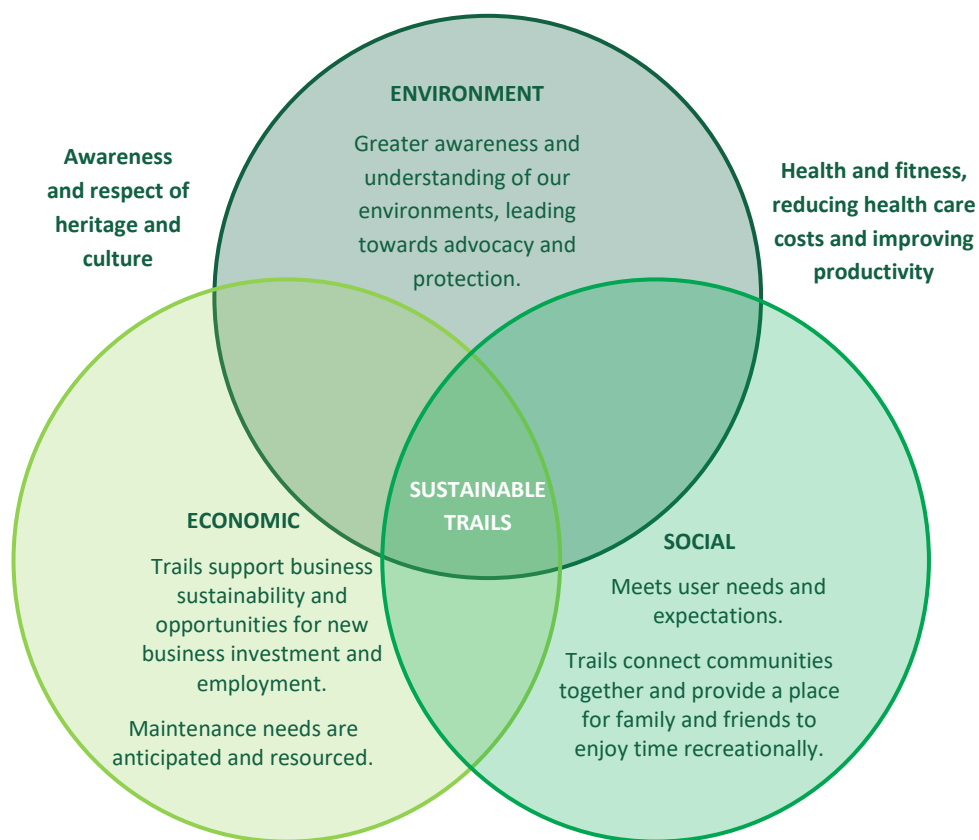
- An estimated 20% of the Australian adult population has a disability or long-term health condition.
- By 2050, it is estimated that nearly one quarter of the population will be aged over 65, with the expectancy that disabilities and accessibility needs will continue to grow.
- Travel undertaken by adults with disabilities accounts for around 1.3 million visitors or 7% of the total Australian adult population. Many of these people will travel with a carer or others during their trip, substantially increasing 'accessible' visitor numbers.
- It is estimated the combined annual expenditure of travellers with disabilities and carers/support family and friends contributes \$8 billion annually to the Australian visitor economy.⁴²

⁴¹ Unordinary Adventures Program, Tourism Tasmania

⁴² ⁴² Tourism Research Australia – Accessible Tourism 2018 Factsheet

1.17 Economic and social benefits of trails

Figure 12. Benefits of Trails



Value of trails

The Australian Transport Assessment and Planning Guidelines (ATAP) for estimating the benefits associated with cycling and walking estimate the health benefits of cycling at \$1.58 per km (in 2020 dollars). This is a cumulative value and includes the following benefits:

- Health and physical activity (in terms of increased life expectancy and reduced risk of disease and illness)
- Health system benefits (in terms of a reduction in costs borne by the health system as a result of physical inactivity).

Further, physical activity such as trail-based recreation is also likely to contribute towards higher societal productivity due to reduction in absenteeism and presenteeism in the workplace because of improved physical and mental health.

The productivity benefits of sport and active recreation are estimated at \$11.325 billion nationwide. This is approximately \$767 of productivity benefits per individual who participates in a sport and recreational activity per year.

With mountain biking this can often show added benefit in the form of trail building and maintenance, or club/event officials. Volunteering in the sport and active recreation sector is estimated to add \$6.327 billion to the Australian economy. This converts to approximately \$3,214 of volunteering benefit per volunteer per year.⁴³

⁴³ Transport and Infrastructure Council. 2016. Australian Transport Assessment and Planning Guidelines, M4 Active Travel

Health benefits

Many of the perceived benefits of outdoor recreation are being confirmed by scientific research into physical and mental health and wellbeing. We know that:

- physical activity releases endorphins
- socialising creates a feel-good cocktail of oxytocin, serotonin and dopamine
- being out in nature in the fresh air stimulates serotonin production.⁴⁴

Bushwalkers regularly report these positive feelings and benefits to be gained from time on the trails.

A West Australian Government report *More People More Active Outdoors* (2019) referenced supporting research, which summarised “five pillars” supporting the benefits of outdoor recreation:

1. Personal development, challenge and enjoyment
2. Improved health and wellbeing
3. Outdoor learning
4. Connection to nature
5. Economic development.

It is not only of great benefit to the individual to be recreating in nature, but also in the interest of employers, healthcare providers and educators.

Encouraging participation in outdoor pursuits assists individuals in reaching their full potential, both physically and mentally. One in five Australians experiences a mental health condition in a given year and almost one in two will experience a mental health condition at some point in their lifetime.⁴⁵

⁴⁴ Better Health Channel. Victoria State Government. Retrieved from www.betterhealth.vic.gov.au

⁴⁵ Australian Bureau of Statistics. National Survey of Mental Health and Wellbeing: Summary of Results. (2008). Retrieved from www.abs.gov.au

Physical exercise, socialising, and spending time in nature are known to be complementary and preventative treatments for anyone suffering, or at risk from suffering, from mental health conditions.

In 2018, the Move It AUS campaign was launched due to reduced overall health and vitality of the nation, with the aim to have every adult commit to 30 minutes of exercise daily.⁴⁶

Mountain Bike Spending

The research and Australia-wide examples indicate attracting mountain bikers to purpose-built locations can have significant economic benefits.

Research by GHD and AusCycling estimate that people who mountain bike spend approximately \$27.10 per ride.

On intrastate holidays for the primary purpose of mountain biking they would typically spend \$1,707.95 each trip, typically with one to three trips completed annually.

When people go on an interstate holiday that revolves around mountain biking they would typically spend \$2,485.75 each trip, typically with one to two trips completed annually.⁴⁷

⁴⁶ Sport Australia, Find Your 30. (n.d.) Retrieved from www.sportaus.gov.au/findyour30

⁴⁷ GHD Report for AusCycling - Mountain Biking in Australia: An Economic and Participation Analysis

Figure 13. Summary of MTB expenditure

AVERAGE EXPENDITURE	MTBA MEMBER	NON-MTBA MEMBER	TOTAL RIDERS
Expenditure per ride	\$25.95	\$28.25	\$27.10
Annual expenditure per ride	\$2,726.20	\$1,849.90	\$2,282.90
Annual expenditure on items equipment and clothing	\$5,990.65	\$3,875.20	\$4,921.95
Expenditure on intrastate MTB holiday per trip	\$1,934.55	\$1,412.15	\$1,707.95
Expenditure on interstate MTB holiday per trip	\$2,594.10	\$2,305.90	\$2,485.75

Figure 14. Economic contribution of mountain bike riders to Australia⁴⁸

IMPACT	OUTPUT (\$M)	VALUE ADD (\$M)	WAGES AND SALARIES (\$M)	EMPLOYMENT (FTE)
Direct Impact	\$630.8	\$358.0	\$233.7	4,163
Indirect (Type 1 Impact)	\$339.1	\$156.0	\$78.9	769
Indirect (Type 2 Impact)	\$443.1	\$234.5	\$100.2	1,163
Total Impact	\$1,413.0	\$748.5	\$412.7	6,095

⁴⁸ GHD Report for AusCycling - Mountain Biking in Australia: An Economic and Participation Analysis

⁴⁹ Tasmania Parks and Wildlife Service 2021, SGS Economics and Planning Tasmania's next Iconic Walk Feasibility Study

Bushwalking and trail running spending

Guided and self-guided accommodated walks are one of the fastest growing tourism products in Australia and other international destinations. This high-value growth market is being targeted by other Australian jurisdictions and international destinations. Due in part to the restricted availability, many of the Australian 'Great Walks' operated at or near 100% capacity, especially in peak periods.

Overall, the development of walking across Tasmania (through products such as the 60 Great Short Walks) has been highly successful. Tasmanian Visitor Survey (TVS) data (year end March) from 2017–2019 shows total bushwalkers forming about 44.5–47% of all visitors, and those undertaking any type of walk as 52–54% of all visitors. Multi-day walkers (bushwalk overnight or longer) were 3.1–3.6% of all visitors. The 2018–2019 data showed a slight drop in overall walker proportions compared to the two previous years across all types of walking examined.⁴⁹

Trail running events can bring significant economic benefits for surrounding communities. In 2017, more than US\$8.5 million was generated from the Ultra Trail du Mont Blanc (UTMB)⁵⁰, considered the global pinnacle of ultra-trail running events. In Australia, Ultra Trail Australia now hosts a sell-out (capacity) 6,000 across five distances. The Blue Mountains City Council's Event Strategic Plan identified the Ultra Trail event as a high yield event contributing an estimated \$12.5M in 2018 to the local economy and supporting local employment and associated businesses.⁵¹

⁵⁰ <https://www.lyoncapitale.fr/actualite/coronavirus-et-trail-quel-impact-sur-l-utmb/>

⁵¹ https://www.bmcc.nsw.gov.au/sites/default/files/docs/LPP_Report_2_Violet_Street_KATOOMBA_NSW_2780_X_687_2020.pdf

1.18 Heritage, cultural and environmental considerations

Tasmanian Aboriginal Culture

Aboriginal communities have lived in Tasmania (lutruwitta) for over 35,000 years. For Aboriginal Tasmanians, the North East is a highly significant cultural landscape where the community continues to demonstrate its living culture and connection to the land.

Much can be learned from the interaction between Tasmanian Aboriginal people, the land and sea. The Aboriginal practice of living and managing resources in a sustainable way and protecting the land and sea for future generations, can provide an important context for visitor interaction with the landscape today.

The Strategy will look for opportunities where both Tasmanian Aboriginal people, local people and visitors can experience the Aboriginal Culture and landscape. Future and existing trails will be managed in a manner that considers carefully how to minimise risks to cultural sites and to comply with Guidelines issued under the Aboriginal Heritage Act 1975.

The strategy planning team met with the local Tasmanian Aboriginal Traditional Owners to discuss potential trail experiences and sought ways in which traditional owners can better experience sites. This is particularly important as many are growing in years and require ease of access to experience some of their traditional living places.

Environment

Good trails will contribute to greater awareness and understanding of our ecosystems and natural places leading towards advocacy and protection. Trails can be developed with minimal impact to the environment and if developed effectively can contribute to ecosystem health, particularly when combined with species management and recovery plans and restoration projects.

Providing high-quality infrastructure and creative trail spaces provides opportunity for visitors and locals to engage with the unique and diverse environment of Northeast Tasmania.

To ensure the integrity of the natural environment the development and management of the St Helens MTB Trails the Council focused on sustainability and biodiversity protection. Detailed environmental investigations to be undertaken very early on in the planning and development process. These investigations provided the specification and standards which were incorporated in all Planning and Contract documentation.

Throughout the entire St Helens MTB trail network there are 11 registered eagle nests both wedge tail and white bellied sea eagles. These birds are integral to the Tasmanian ecosystem. In the North East they are regularly spotted all the way through the Fingal Valley and along the coastline. Both species of eagles are endangered and vulnerable, making it essential that all is done to protect them.

The involvement of leading ecologists, experts and stakeholders is fundamental to the delivery of high quality, sustainable trails and the delivery of specific environmental management plans, including Eagle Management Plans Weed and Disease Management Plans, Vegetation Management Plans and *Phytophthora cinnamomi*, (Root Rot, Dieback) mitigation strategy, which includes efficient and easy-to-use hygiene stations.

The learnings from the St Helens MTB Trails project's environmental practices provide the opportunity to apply similar best practices to new trail planning, construction and management projects.

The coast has many biodiversity values and challenges and PWS strongly assess future trail experiences on the coast due to the potential impact on shore birds and Tasmanian Aboriginal cultural sites.

As many of the trails within Break O'Day are situated on PWS land, the Council works closely with PWS in the development and future delivery of the recommendations of this Strategy.

The Weed and Disease Management Plans (WDMP) details the threats and requirements for the management of weeds, flora and fauna and disease risk associated with the construction and operation of the St Helens MTB Trail Network.

The WDMP provides direction to the managers, contractors and operators of the trails to minimise the impact to natural habitats and biodiversity on which the trails are located and seek to eliminate the risk of weeds and diseases spread along trails by use.

4 Assessment of Break O'Day as a Trail Destination



1.19 Trail hierarchy of offering

Trail classification

Trails can be classified by a hierarchy of offering, which can help define prioritisation for investment, management, maintenance and marketing.

Figure 15. Trails Classification Signature, Supporting and Local Trails

SIGNATURE TRAILS

A small number of outstanding trail experiences that have the pulling power to persuade a visitor to come to the Break O'Day and generate the greatest economic and local benefit.

E.g. Bay of Fires Mountain Bike Trail; Bay of Fires Lodge Trail, Blue Tier MTB Descent Trail

SUPPORTING TRAILS

A less prominent visitor offering but providing quality visitor and local experiences to support Signature trails and hubs and important recreational opportunities for local communities.

E.g. Blue Tier Forest Reserve walking trails; Apsley River Waterhole and Gorge, Evercreech 'White Knights' walk and waterfall

LOCAL TRAILS

Important to the local community,
often developed through local action.

*E.g. Winifred Curtis Reserve Walks, Coal Miners Heritage Walk
Cornwall*

Signature Trails

A small number of outstanding trails will be chosen as the region's Signature Trail experiences and will have the highest priority for regional investment. These trail experiences will have strong marketability that can attract visitors and achieve recognition beyond the region. They will reflect the region's strengths and key points of difference across the trails offering. They will also align to the positioning of the region and fill identified gaps in the region's trail offering.

Signature Trails Criteria

The highest quality experiences in nature and culture:

- One of the best trails of its type
- The highest quality infrastructure that is fit for purpose and sustainable
- Accessible to target markets for Break O'Day and for trail visitors
- Good information – from pre-trip to post-trip follow up
- Environmentally and culturally sustainable
- Effective management and coordination, including community
- Brand and reputation aligned and positioned in the market
- Provides (or has the potential to provide) for strong visitor number growth in Break O'Day.

Signature Trails Criteria:

Are significant trails that form the core of the trail network and:

- Provide quality experiences for residents and visitors
- Support the region's positioning and its signature trails by offering a variety of other quality experiences and have the potential to keep people in the region longer
- Will be prioritised for development based on their needs and potential to contribute to the destination, and opportunities for business growth based on the trail visitor numbers and yield
- May have the potential to evolve into Signature Trails. Decisions on conversion to Signature Trails should be made based on the criteria and with the appropriate decision-making governance framework applied.

Supporting Trails Criteria:

Attract people from within and outside the region with good standards, facilities and services and include:

- Strong experience offering
- Quality infrastructure – fit for purpose
- Good accessibility for users
- Designed and managed to limit damage to the environment
- Effective management regime
- Could cope with some increase in use if required
- Can collectively be part of a Signature Trail hub or group
- Provides a contribution to the visitor economy (or has the potential to) through increased visitor numbers, or increased length of time spent while in the region.

Local Trails Criteria

Local trails primarily service a local community and provide facilities suited to local markets:

- Investment in local trails will be the responsibility of the relevant Council or trail (land) manager
- Prioritisation for works, improvements and signage on these trails would continue with the managing authority
- A designation as a local trail does not imply it will receive less funding, or that it is less important to a local community
- Importantly it continues to place the decisions for the management of trail at a local level so that issues and opportunities are addressed locally.

1.20 Successful trail destinations

A successful trail destination is more than its physical trails. A combination of factors creates a destination that continues to attract visitors through its reputation for quality and a special experience, while being supported, popular and well used by locals.

At the core of attracting trail visitors is the environment and setting, the quality and quantity of trails, their accessibility, and the interest and (in some cases) the challenge offered.

The provision of an adequate supply of services is also critical. Trail users today have higher expectations about their trail experience and the broader community seeks to ensure trails are sustainable, well resourced, provide benefit, and contribute to community wellbeing.

What are the stakeholder and community views?

The views of stakeholders and the community were sought in the development of the Break O' Day Recreational Trails Strategy.

The consultation sought to understand views, concerns and aspirations to be considered in the development of future directions and decisions and to provide advice and innovation in the formulating of solutions, recommendations and decisions to the maximum extent possible. Community views are important in developing the very best community supported trails. Across the range of consultation activities, the team sought the views of active trail users, the broader community, and those that for whatever reasons do not currently use trails or would like to be more involved.

The planning team also met with the principal landowners, including representatives from Tasmania Parks and Wildlife Service and Sustainable Timber Tasmania, and representatives from conservation organisations, trail and recreation specialists, tourism operators and local Tasmanian Aboriginal Traditional Owners.

The broader community were invited to contribute ideas for the strategic future of Break O' Day recreational trails through an online survey. The survey questions focused on existing use, what would encourage future use, what ideas are there for improvement and what barriers are there for people being involved in trails.

The survey was provided directly to the Break O' Day community and visitors between 11 October and 7 November 2021, attracting 158 responses.

The community survey was delivered concurrently with a series of Break O' Day Recreational Trails Community Drop In Sessions conducted at Scamander, St Helens, St Marys and Fingal between 20 and 21 October 2021. The Community Drop In Sessions attracted some 36 participants.

To ensure a wide cross section of community views, Break O' Day Council also undertook an online survey of mountain bikers including visitors from beyond the Break O' Day Council area through the St Helens Mountain Bike Trails – Rider Survey.

A summary of the community views on the Recreational Trails Survey and the St Helens Mountain Bike Trails - Rider Survey are provided below and the more detailed considerations have been included in the development of the Break O' Day Recreational Trails Strategy. A full report of Recreational Trails Survey can be found in Appendix K.

Figure 16. Break O'Day Recreational Trails Survey Analysis

RECREATIONAL TRAILS SURVEY ANALYSIS

The survey attracted **158 RESPONSES**.

KEY THEMES:

- ongoing maintenance
- more walking trails
- more multi user trails
- problems with access to trails
- investment in the hinterland/valleys (not only the coastal areas and St Helens)
- trails for all abilities and ages
- need a aquatic centre / swimming pool
- walking trails in Fingal Valley
- dogs / leash free trails
- multi day walks
- equal emphasis on ALL trails
- interest in St Marys Fingal rail trail

THE SURVEY WAS OPEN

11th October 2021 to the 7th November 2021.

TRAIL ACTIVITIES

TOP THREE

Bushwalking short and day walks

81%

Local walking for exercise and enjoyment

76%

Enjoying nature

69%

MOTIVATION

TOP THREE

Nature and the environment

93%

Exercise

90%

Wellbeing

75%

ISSUES

FOR EXISTING TRAILS

- Need maintenance
- Too much focus on the St Helens area
- Not enough Parking (St Helens)
- Access

WHICH TRAILS

TOP KEY WORDS

WALKING TRAILS

ST HELENS

BLUE TIER

ST MARYS

MTB TRAILS

WHY THESE TRAILS

TOP KEY WORDS

NATURE

BEAUTIFUL

EXERCISE

NEED MORE

TOP KEY WORDS

SHORT WALKS

LONGER DAY WALKS

DOG FRIENDLY TRAILS

ACCESSIBLE TRAILS

MANY SURVEY RESPONDENTS ALSO SAID NONE, THERE WERE ALREADY ENOUGH TRAILS.

WHAT WOULD MAKE IT EASIER TO GET INVOLVED IN MORE TRAIL ACTIVITIES

Need trails closer to home

50%

Need more trails that suit my abilities or interests

50%

COMMON THEMES:

- better maintenance
- access
- signage
- an increase of walking trails

NEW OR UPGRADED TRAILS

WHERE?

- St Helens
- St Marys Fingal
- St Helens Binalong
- Binalong Bay
- Scamander

Figure 17. St Helens Mountain Bike Trails - Rider Survey Analysis

MTB SURVEY ANALYSIS

From 30th September to the 7th November the survey attracted

242 RESPONSES

RESIDENCY

83% Tasmania
16% Australia
1% International

TRAVEL PARTY

45% With my family
26% With my partner
16% As part of a group

AGE GROUP

39% 36-45 age bracket
28% 46-55 age bracket

84% Survey respondents staying in St Helens or surrounds

ESTIMATED SPEND PER DAY
excluding accommodation
\$134

staying
3 NIGHTS
average

SPEND ON ACCOMMODATION
average
\$93

THE PRIMARY REASON FOR TRAVELLING TO ST HELENS

62% Specially to ride the St Helens MTB trails

FREQUENCY OF MOUNTAIN BIKING

42% Weekly
30% More than once a week

MOUNTAIN BIKE SKILL LEVEL

48% I'm OK – Intermediate
43% I'm pretty good – Advanced

PLANS TO VISIT OTHER MTB NETWORKS IN THE NEXT MONTH?

76% Blue Derby
41% Wild Mersey
34% Maydena

HOW DID YOU FIND OUT ABOUT THE ST HELENS MOUNTAIN BIKE TRAILS

45% Social Media
36% Friends/family

TO GET TO THE ST HELENS FLAGSTAFF TRAILS

48% self-shuttling (car)
27% riding
25% using a shuttle service

TO GET TO THE BAY OF FIRES TRAILS

53% self-shuttling (car)
47% using a shuttle service

TRAIL CONDITION

49% Good
38% Excellent

SIGNAGE

75% Easy to understand
20% I had some trouble understanding

OTHER ACTIVITIES WHILE IN BREAK O'DAY COUNCIL REGION

76% Relax
36% Bushwalking
26% Surfing

WHAT DO YOU THINK WE ARE DOING WELL

- Variety of trails
- Trail maintenance
- Facilities
- Family friendly
- Shuttle service
- Social media / advertising

WHAT COULD WE CONSIDER DOING DIFFERENTLY?

- Pump track
- Drinking water at trail head
- Shaded areas
- Better signage
- More food and drink options
- Improve the café at the trailhead (service and food quality)
- BBQs
- Toilets
- Showers
- Wash stations
- Additional parking
- More green and blue trails
- Better climbing trails
- Improve social media content
- Camping / caravan area
- Free or cheaper shuttles (or day passes or 10 passes)
- Events

WHAT ARE WE CURRENTLY NOT DOING AND SHOULD CONSIDER DOING?

- Green trails
- BBQ areas
- Showers
- Trail head signage should include ride times and distance
- More food facilities at trail heads, including vegan options
- Additional parking
- Pump track
- Skills park
- Play equipment
- Loyalty program
- Free or cheaper shuttles
- Tech trails, gravity trails, more flow and switchbacks
- Lit up night circuit
- Camping ground
- Bike wash
- Trail guides
- Trail maintenance
- Enduro events
- MTB parties
- Selling beer

GENERAL FEEDBACK

- Provide more overflow parking, especially for RVs
- Safety messaging on rider education (safe progression), trail network design
- Better maintenance of less used tracks
- More dog friendly accommodation in the area
- Water stations
- Free shuttles
- Lack of pump track or skills park
- Better signage
- More bench seating
- Music at trailhead



Figure 18. Requirements for great trail destinations



1.21 Potential and opportunity as a trails destination

For Break O'Day to continue and further develop as a distinctive Signature, Supporting and Local Trails Hub requires commitment, leadership and investment. It also requires trail networks to be well managed, attractive to a wide range of people including visitors and locals, with a strong focus on sustainability

A future Break O'Day trail network will include a combination of signature, supporting and local trails.

Table 3. Summarised Potential and Opportunity for Trail Development – the full analysis is included in Appendix C.

TRAIL INFRASTRUCTURE, DESIGN, SUPPORT FACILITIES AND MANAGEMENT		
FACTORS THAT CREATE GREAT TRAIL DESTINATION	HOW BREAK O'DAY PERFORMS AS A TRAIL DESTINATION	SUGGESTED IMPROVEMENTS
Diversity of trail types, styles and destinations	Mountain Bike Trails Successful MTB destination with trails ranging from beginner (green) to intermediate (blue) as well as serious downhill (black), cross country flow and fun trails for the family. The Bay of Fires Trail is a 42 km mountain bike adventure trail is a particular highlight. The MTB Survey of November 2021 reflected positively on the variety of trails with some additional trails across types and styles sought. The addition of a pump track and skills park were identified by respondents as facilities they are seeking.	<ul style="list-style-type: none"> • The recent MTB survey provides a range of suggested improvements. Many of these are being implemented including new trails. • Plan for recognition as IMBA Epic Trail and Mountain Bike Town destination. • Development of a pump track and skills park will provide increased benefit to the overall experience.
	Walking and Other Trails Short walks available including waterfall and coastal walking. The North East includes eight examples of 60 Tasmanian Great Short Walks, with four within Break O' Day. Established guided and independent multi-day walking includes the Bay of Fires Lodge Walk and wukalina Walk. Independent multi-day walking is available in the Douglas Aspley National Park, however, vehicle access to the trailhead is restricted. There are few opportunities for local people to walk, run or ride close to or within the towns.	<ul style="list-style-type: none"> • The Recreational Trails Survey and Community Drop in Sessions undertaken as part of this Strategy indicated a strong desire for a greater focus on walking trails. • A summary of community comments is provided in Appendix K and are outlined in these suggested improvements. • Requires a range of walking trails suitable for local people to walk, run or ride close to or within the towns. • Requires good long-term access to trails. • Provide trails with a focus on Tasmanian Aboriginal culture. • New trail experiences should be explored that reflected the Break O' Day character, including kayaking trails.

TRAIL INFRASTRUCTURE, DESIGN, SUPPORT FACILITIES AND MANAGEMENT

FACTORS THAT CREATE GREAT TRAIL DESTINATION	HOW BREAK O'DAY PERFORMS AS A TRAIL DESTINATION	SUGGESTED IMPROVEMENTS
Concentration of trail opportunities	<p>The St Helens Mountain Bike Trails provide a mix and concentration of trails in remarkable scenery. Walking has improved within St Helens with the introduction of new sections of the shared use foreshore trail, however further expansion of the trail network and road connections is required. The Fingal Valley and St Marys area has some spectacular trail experiences and opportunities, there are short trails within the towns and a skills park has recently been developed in St Marys. Longer trails for local and visitor use can be improved. There are recent trail investments including the St Marys bike skills park and the community space. The Beaumaris, Scamander and Falmouth areas to the south east have an assortment of beach access points with some connecting trails and a developing system of shared use footpaths.</p>	<ul style="list-style-type: none"> • Development of proposed new trails and future pump track and skills park will contribute to a good concentration of MTB opportunities. • Increase the concentration of trails for locals and visitors within the St Helens and Georges Bay area. • Provide a mix of trail experiences in the Fingal Valley that are popular with visitors and the local valley community. • Explore new connecting trails within the Beaumaris, Scamander and Falmouth areas that connect visitors and locals with the towns and landscapes whilst ensuring protection of shore birds and the fragile coastal environment.
High quality, sustainable trail infrastructure	<p>MTB trails are maintained at a high standard and the popular and recognised trails such as the Break O' Day 60 Great Short Walks are maintained. Other trails are less well maintained due to restrictions on budgets and the need to maintain service standards.</p>	<ul style="list-style-type: none"> • Identify the priority trails and focus on these to maintain the experience. • Ongoing MTB trail maintenance is a priority and identified during the user survey. Future sustainable maintenance resourcing is required. • Governance including initiatives from the Trails Collective will contribute to sustainability improvements.
Leading (Signature), supporting and local trails	<p>Mountain Bike Trails The Bay of Fire Mountain Bike Trail and the Blue Tiers Descent are Signature Break O' Day trails providing the attraction and drawing visitors, complimented by the St Helens Mountain Bike Trails. These trails are clear examples of leading, supporting and local trails that contribute to an exceptional mountain bike destination.</p> <p>Walking and Other Trails Leading trails include the multi-day Bay of Fires Lodge Walk experience and the wukalina walk palawa traditional owners</p>	<ul style="list-style-type: none"> • There is a need to identify the trail priorities within the Leading (Signature), supporting and local trails into the future, and prioritise resourcing and commitments accordingly • Through consultation, planning and permission there is opportunity for increased recognition and opportunity for Traditional Owners, locals and visitors to experience Tasmania's Aboriginal living places through appropriate trails.

TRAIL INFRASTRUCTURE, DESIGN, SUPPORT FACILITIES AND MANAGEMENT

FACTORS THAT CREATE GREAT TRAIL DESTINATION	HOW BREAK O'DAY PERFORMS AS A TRAIL DESTINATION	SUGGESTED IMPROVEMENTS
	<p>owned and led guided experience. The Bay of Fires Lodge Walk provides the draw to visitors and provides Signature recognition, while the wukalina Walk has the potential to be one of the special Traditional Owner-led cultural experiences within the Mount William National Park.</p> <p>The spectacular St Columba Falls has the pulling power to persuade a visitor to come to the Break O'Day, evidenced by the 40,000 visitors per year.</p> <p>Local trails generally close to, within, or between towns are popular with residents. There are calls for more or improved local trails evidenced through community consultation.</p> <p>The Blue Tier Forest Reserve walking trails provide some good supporting regional trails ranging from 20 minutes to 6 hours, and provide glimpses of the tin-mining heritage in this alpine setting, attractive to visitors and locals.</p>	<ul style="list-style-type: none"> • Fingal Valley seeks a network of multi-use trails that are family accessible • A rail trail between St Marys and Fingal has been sought by local people for fitness and recreation. • A shortened rail trail from St Marys to Cornwall is a popular alternative to a costly 20km link to Fingal for multi-use and family walking. • St Patricks Head is a spectacular and popular walk with local people and has the potential to draw visitors, however, access is problematic, and part of the trail is placed on private land. • There is community desire for development and improvement of new and existing trails in the Fingal Valley. • The existing Georges Bay Trail is popular and inclusion of an extension and other activities including kayaking is popular. • Scamander River Walking Cycling Trail on the south side of the river by the bridge is an option for future consideration and would require environmental assessment. • Local Fingal town trails for walking and cycling with a focus on heritage.
Accessibility	<p>Access to the St Helens Mountain Bike Trails is excellent through the Flagstaff Trail Head and via the shared town trail to and from St Helens. Vehicle access above the Flagstaff Trail Head is via forestry roads often shared with large vehicles.</p> <p>Access to the numerous designated walking trails is across a mix of Tasmania Parks and Wildlife Service, Sustainable Timber Tasmania and council managed roads. Some of the known waterfall trails and previous popular day and multi-day walks have restricted access due to bridges being unsafe and being removed and forest roads being unsuitable for visitors, or not suitable for visitor vehicles.</p>	<ul style="list-style-type: none"> • The identification of priority trails will require commitment to providing suitable access for locals and visitors. • Future air access to St Helens via the existing air strip would provide a significant fly in fly out opportunity for trail users. • Visitors and locals will need to understand the limitations and difficulty accessing some less priority trails. • Some priority trails are accessed through private land. This arrangement is currently working with landowners supporting sustainable trail access, however permanent access arrangements should be considered.

TRAIL INFRASTRUCTURE, DESIGN, SUPPORT FACILITIES AND MANAGEMENT		
FACTORS THAT CREATE GREAT TRAIL DESTINATION	HOW BREAK O'DAY PERFORMS AS A TRAIL DESTINATION	SUGGESTED IMPROVEMENTS
	<p>Community consultation indicated a desire for local trails close to home without the need for driving and improved accessibility for all abilities.</p> <p>Some popular trail experiences rely on access across private land. The support provided by landowners enables visitors to access these trails. These landowners are recognised for their contribution to community benefit.</p>	<ul style="list-style-type: none"> Continuous improvement of shuttle services (both self-shuttle and paid) will contribute to reducing congestion on access roads and at key access points and improve safety.
Effective governance, coordination and management	<p>Multiple agencies contribute to the delivery of great trail experiences and the challenges of resourcing and managing these existing trails is recognised. The perception of the amount of public funds used for the management of trails is a concern. Tasmania Parks and Wildlife Service and Sustainable Timber Tasmania have indicated they have limited resources for the management of recreational assets and are focused on ensuring the existing recreational infrastructure is managed effectively. There is a reluctance from these agencies to take on new trail initiatives without further resources being available. Future governance and resourcing arrangements and partnerships have been developed that provide for the sustainable management of trail experiences. These arrangements also provide evidence of benefit for communities.</p>	<ul style="list-style-type: none"> Governance arrangements that provide additional resources and encourage less of a Council focus on the MTB Network and its management would be beneficial. Future governance and management arrangements will need to develop support from the broader community while continuing the strong links to businesses and individuals. Future governance should seek to include the broader Break O'Day trails and further develop relationships between Council and key land managers.
Community and industry engagement and support	<p>The community have indicated support for an upgrade of some existing trails and a limited number of new trails. There was strong support for trails in Fingal Valley and St Marys for local community use and to attract visitors. Opportunities exist for open days where walkers and trail runners can experience the beauty of the trails and develop a greater understanding and involvement in the trails.</p> <p>The mountain bike trails have seen strong support from the mountain bike community and businesses, reflected in the support for the Trail Ambassador Program. The St Helens MTB</p>	<ul style="list-style-type: none"> Continued development of the St Helens MTB Trail Network, Break O'Day Trails Collective Inc and governance arrangements will need to include innovative sustainable resourcing solutions and continue to encourage community support for MTB trails. Volunteers have an opportunity to play an increasing role in promotion and advocacy across the growing range of trail activity and to generate networks and understanding across these activities.

TRAIL INFRASTRUCTURE, DESIGN, SUPPORT FACILITIES AND MANAGEMENT

FACTORS THAT CREATE GREAT TRAIL DESTINATION	HOW BREAK O'DAY PERFORMS AS A TRAIL DESTINATION	SUGGESTED IMPROVEMENTS
	<p>Trail Network and Break O'Day Trails Collective Inc. have provided governance and financial contribution to the ongoing maintenance and development of the trail network contributing to the premium riding experience.</p> <p>The support of the community is important in developing future trails and the spirit developed during the recent Drop In Sessions and Break O' Day Trails Survey should be followed through with staged delivery of a new trail focus.</p> <p>Volunteers across MTB, walking and trail running within PWS, STT and Council managed lands provide significant contribution. They are involved in developing policies and standards, monitoring trail conditions, planning events, raising funds, maintaining trails and updating and monitoring social media. Future opportunities include leading guided trail activities, getting involved in trail consultation activities, and further promoting the Trails Collective.</p>	<ul style="list-style-type: none"> • Volunteers will continue to have an important role in funds generation, sharing trail news, information and stories, developing policies and driving passion for the trails. • Community enthusiasm for trails should be recognised through with staged delivery of a new sustainable trails focus.
Trail Maintenance and Day-to-Day Management	<p>Responsibility for future management and maintenance will rest with land managers. It is important to ensure that trails and structures are designed and built to the very best trail practice, ensuring a great trail experience that doesn't place management or maintenance burdens on the agency.</p>	<ul style="list-style-type: none"> • Initiatives such as the Break O'Day Trails Collective Inc. and the Trail Ambassador Program will be important to ensure day-to-day management is maintained. • State Government contributions towards maintaining priority trails would assist in ensuring that these premium products are maintained to the highest level, as the whole state benefits from them – not just the local community. • Seek further opportunities to encourage sponsorship and donations including deductible gift recipient status for The Collective to then match donations by individuals a tax deduction. • Strong liaison, coordination and shared responsibilities with all land managers is important to ensure a sustainable future for trails.

TRAIL INFRASTRUCTURE, DESIGN, SUPPORT FACILITIES AND MANAGEMENT

FACTORS THAT CREATE GREAT TRAIL DESTINATION	HOW BREAK O'DAY PERFORMS AS A TRAIL DESTINATION	SUGGESTED IMPROVEMENTS
Distinctive experiences	<p>The Break O' Day landscape includes some remarkable and distinctively north-eastern Tasmanian views, experiences, culture and environments.</p> <p>The climb up St Patricks Head near St Marys is rewarded by stunning 360° views of ranges, valleys and the Tasman Sea. Views expressed during consultation indicated St Patricks Head as one of the community's favourites.</p> <p>The ridge tops that surround the valley provide opportunity to explore short or longer distance walking or trail running experiences whilst the coal mining history and waterfalls provide distinctive themes for trails and interpretation.</p> <p>The 42 km Bay of Fires Trail makes for a distinctive North East Tasmanian mountain-bike experience. St Helens will continue have a focus on planning and developing unique, distinctive and diverse trail experiences.</p> <p>The Traditional Owners of the land recognise many features in the landscape through cultural stories, song lines and as boundary markers on the land. The coastal rainforest, tidal flats and cultural living places around Georges Bay and Moulting Bay are places to be protected but also provide opportunity for improved access for Traditional Owners and visitors to the land. Blue Tier and waterfall trails and rainforest walks are well represented. Coastal trails are represented but may need review to avoid coastal impacts. Multi-day walks have been provided through Bay of Fires Lodge Walk and the wukalina Walk, however, the popular Douglas - Apsley National Park multi day walk has been restricted due to the removal of a bridge on the access track.</p> <p>The rock climbing at Bare Rock out of Fingal is emerging as one of Tasmania most popular climbs. Not technically a trail experience,</p>	<ul style="list-style-type: none"> • Appropriate and enjoyable trails where people can be involved in these special places by trails is important. • The differing land and sea scapes need to be presented to visitors and locals via a range of trails that suit user needs. • There is opportunity through distinct short cultural walks and through the multi day wukalina walk to promote distinctive Tasmanian Aboriginal cultural experiences shared by traditional owners, locals and visitors. • The distinctive Bare Rock is a draw for climbers and could see the Fingal Valley become an attractive place for climbers and associated visitors to visit and stay in Fingal. • Trails that both provide access for Aboriginal people to areas important to them and to introduce visitors to these sites will provide unique and distinctive trail experiences. • Swimcart Beach to Binalong to St Helens has been proposed as an off-road shared trail to connect these coastal areas. This supporting trail is to be assessed as part of the Bay of Fires Master Planning process to investigate the feasibility and sustainability of this proposed trail. This approach is a good example of collective decision-making incorporating a range of issues.

TRAIL INFRASTRUCTURE, DESIGN, SUPPORT FACILITIES AND MANAGEMENT		
FACTORS THAT CREATE GREAT TRAIL DESTINATION	HOW BREAK O'DAY PERFORMS AS A TRAIL DESTINATION	SUGGESTED IMPROVEMENTS
	however, the attraction of Bare Rock as a destination for walkers is significant.	
Quality pre-trip information	<p>The St Helens Mountain Bike Trails and the Bay of Fires Trail have an excellent online focus providing up to date information for riders and the community. Pre-visit information through Break O' Day Council and East Coast Tasmania websites is available including for popular trails.</p> <p>More detailed Information (in-person and online) on short walks, multi day walks and other trails in the region is lacking in quality and consistency.</p>	<ul style="list-style-type: none"> • Continue the range of pre-visit information to ensure people are getting the very best, safe and issues free experience and by picking the right trail experience that is right for them. • Provide pre visit and on-site trail visitor information to ensure enjoyment, safety and comfort of visitors for other priority trails including walking trails and ensure to visitors and locals understand the limitations and challenges in accessing some less priority trails.
A range of quality support services and facilities including information and way marking	<p>The on-site mountain bike trail information is excellent with a safety focus including marker poles that are marked with numbers representing the distance from the trail start. The mountain bike trail head and waymarking is world class and clearly reflects the level of difficulty riders will encounter on the trail enabling riders to best suit the trail to their abilities.</p> <p>The established and maintained walking trails are well signposted at the trail head and reflect the classification of trail to be experienced.</p>	<ul style="list-style-type: none"> • The level of MTB trail marking is to a high standard, some comments from the MTB survey indicated some improved ride distance and times required. • Future priority walking trails will need to include quality trail head and waymarking linked to the trail classification.
Trail, food, beverage and retail products and businesses	<p>St Helens has a range of food, beverage and retail products together with bike service and supply shops and shuttle services to transport rider to and from the trails.</p> <p>The attraction of the Valley with new walking experiences and Fingal to climbers at Bare Rock could see the Valley attract and keep new visitors contributing to new hospitality attractions and camping facilities in the Valley.</p>	<ul style="list-style-type: none"> • The MTB survey identified some improvements required to food and beverage available at the St Helens trailhead. • As new experiences develop trail guiding servicing and drop off pick up to base camp operations will provide additional access and experiences for visitors.

5 The Future of Break O'Day Recreational Trails



VISION

Break O'Day connects the special values of the ranges, river valleys and coastal landscapes through extraordinary trail and adventure experiences that link communities, locals and visitors and are supported by strong environmental protections, sustainability and innovative trail experience providers.

OBJECTIVES

The objectives of The Break O' Day Recreational Trails Strategy are:

1. Develop Bay of Fires and St Helens as a Signature mountain bike hub in Tasmania's North East.
2. Deliver trail and adventure experiences and services to meet the needs of the local community and the visitor market and encourage people to visit and stay.
3. Diversify sustainable trail experiences that provide economic benefit and encourage use by local people generating wellbeing and community health benefits.
4. Further develop partnerships with land managers and private land owners and find innovative ways to ensure a sustainable range of trail infrastructure that connects the extraordinary ranges and the coast.
5. Secure public and private sector investment to ensure maintenance of current trails and development of future trails are resourced while minimising impact on rate payers.

GUIDING PRINCIPLES & STRATEGIC PRIORITIES

HIGH QUALITY AND DIVERSE TRAIL NETWORK

Trail infrastructure purpose-built in exciting places for a range of users and to a high quality. Trails link the mountains to the sea and communities together.

SUSTAINABLE TRAILS INFRASTRUCTURE AND SERVICES

Trails are financially, socially, and environmentally sustainable. Trails have minimal environmental impact and contribute to regional biodiversity. Trails are supported by the local community.

INCLUSIVE USER EXPERIENCE

Trails have broad appeal for a diverse range of people of different capacities and abilities. Trails provide greater recognition and opportunity for Tasmanian Aboriginal Traditional Owners to engage with their land and living places.

COLLABORATIVE GOVERNANCE, MANAGEMENT COOPERATION

Land manager partners, private landowners, and community work together to build an accessible trail future across the landscape.

COORDINATED MARKETING AND PROMOTION

Trail marketing and promotion activities are coordinated across the region to optimise visitor awareness of the trail network.

SIGNATURE TRAILS

- Georges Bay including St Helens Foreshore Trail
- Bay of Fires Lodge Walk
- wukalina Walk – Traditional Owners
- Bay of Fires and St Helens MTB Trails
- St Columba Falls

SUPPORTING TRAILS

- Swimcart t- Binalong to St Helens
- Moulting Bay or Clerk Point - Traditional Owner Living Place Trail
- Nicholas Range Adventure Trail
- Blue Tier Forest Reserve Walk Trails
- Douglas Apsley Multi-Day Walk
- Tasmania's 60 Great Short Walks
- St Patricks Head

LOCAL TRAILS

- St Marys to Cornwall Rail Trail
- Fingal Valley Explorer Trail
- Coal Miners Heritage Walk Cornwall
- Town walking and cycling
- Local guiding for difficult to access trails
- Winifred Curtis Reserve

1.22 Break O'Day Recreational trail aspirations

Guiding principles, strategic priorities and objectives

Future recreational trails will be developed that provide benefit for visitors and local people and will be guided by the five principles described above to ensure trails have broad appeal to locals and visitors, will be designed and managed to have minimal impact and will be sustainable, will have a strong focus on collaboration across the landscape and community, will provide links across the landscape through popular experiences and will provide future benefit for the broader Break O'Day community.

The shared vision, guiding principles and objectives have been developed through engagement with the community and stakeholders and delivered through the development of this Strategy and reflected in the trail priorities and strategies.

Regional stimulus

The management of existing trails and future targeted investment and development of trails will be popular with local people and visitors.

The popularity of bushwalking is evident, with 77.9% of East Coast visitors engaged in bushwalking. Of these 62.5% were involved in walks of less than four hours indicating the importance of good short walks.

Mountain biking will continue to play an important role in community health and wellbeing and generating economic and commercial benefits and opportunities for new jobs within the visitor economy.

The focus on mountain biking, events and adventure sports encourages the potential for the development of St Helens and the Northeast of Tasmania as an iconic centre for sport development and expertise. The exceptional mountain bike opportunity attracts a greater range of people to visit and stay, creating opportunity for development.

There is significant opportunity to connect visitors and locals to the spectacular landscapes of the Fingal Valley. The St Patricks Head walking trail has some of the most spectacular views of the valley, the ocean and the coast. Planning and investment in St Patricks Head to resolve the access and safety issues could present this Supporting Trail as an important attraction which has strong support by the local community.

Existing and potential new and upgraded trails discussed in this Strategy

Break O' Day has a significant number of trails of all kinds including some remote trails that are difficult and require local knowledge to access. The existing trail map included trails that were recognised and supported by land managers.

Figure 19. Proposed new and upgraded trails discussed in this Strategy. Break O’ Day has a significant number of trails of all kinds including some remote trails that are difficult and require local knowledge to access. Trails featured below are yet to be assessed.



Figure 20. Existing trail map included those trails recognised and supported by land managers.



Community Recognition of the Benefits and Future Investments

Community survey and consultation for the Recreational Trails Strategy indicated a broad community desire for walking trails for visitors and local people. This will have significant benefits for community health and wellbeing.

The St Helens Mountain Bike Trails – Rider Survey reinforced the popularity of these trails with some modification and additional trail experience required. The majority of the mountain bike and trails infrastructure projects and management by Break O’ Day Council are reliant on investment grants from State and Federal Government. The maintenance of the MTB trail infrastructure is reliant on Council contributions and support from local community and businesses including through the Trail Ambassador Program.

While the Trail Ambassador Program is considered successful and generates some income, it is still evolving and does not offset the entire trail maintenance costs. The long-term sustainability of Break O’ Day Council managed trails is reliant on the establishment of a sustainable management model for mountain biking in the Break O’ Day Council area. This is considered a high priority and critical to the continued success as a mountain bike destination of choice.

Effective governance and management of trail networks is required to implement this report, pursue funding and resources and facilitate collaboration between partners and stakeholders. Depending on the location, management arrangements will need to have the capacity to handle cross-tenure trails, trail development approval processes and risk management. There will also need to be mechanisms in place to coordinate partnerships (such as commercial operators, accommodation, other attractions, events, marketing and promotion).

The preferred governance model should allow for:

- Leadership and direction for the trail network, the ability to seek resources for future investment and maintenance
- Consistent and collaborative planning to provide consistent standards to design, construction, trail classification and risk management
- Sustainable management, maintenance and monitoring to ensure continued environmental, cultural and social sustainability and an effective control environment is in place to reduce risks
- Support for community involvement including support for the work of volunteer trail groups, Indigenous partners and encouraging trail use through programs and events
- Marketing and communication to ensure effective ways to reach tourism markets.
- State Government contribution towards maintenance of priority trails would assist in ensuring that these premium products are maintained to the highest level as the whole state benefits from them not just the local community.

The importance of good governance is recognised as an important feature of the implementation of the strategy.

Social

The consultation for the development of the Strategy identified concern from some sectors of the community about changes to the social makeup of parts of the Council area with the popularity of mountain biking, which has attracted further investment in the towns and the surrounding areas. This is also reflected in comments seeking additional trail investment within the Fingal Valley and St Marys, where towns seek trails that are suitable for use by people across a range of abilities to exercise and wellbeing. Also, they seek improvements to existing trails that will attract visitors and encourage visitors to stay longer within the Fingal Valley.

1.23 Governance and management

In reviewing successful trail destinations, clear, effective governance is one of the central pillars that helps a destination operate effectively and become internationally recognised.

An effective governance model will be required for the Break O' Day experience if it is to become a successful mountain bike and trails destination.

The most successful management models for trail networks across Australia and New Zealand have the following characteristics:

- Governance and accountability is clear and simple to initiate and administer over the longer term
- The strengths and expertise offered by each partner in the model are recognised and the preferred model allocates responsibilities and authority accordingly
- The visitor experience and presentation of the trail networks are substantially improved or continually improving, and the new model facilitates commercial tourism positioning, product development and marketing
- The trails are supported by a range of funding sources with a revenue raising mechanism to enhance cash flow to enable self-generated investment into facilities, assets and services
- An effective control environment is in place to reduce key risks (to staff, volunteers and visitors) and each agency's operations are not adversely affected (i.e. there is no dilution of effectiveness)
- The benefits of the model are visible to the community, and it is inclusive of user and community groups.

Good governance provides for well made decisions based on evidence and made in a collaborative way aligned to a strong sense of vision and long-term planning for trails. An effective governance structure and mechanism is important for each destination, and it is important that the governance model is fit for purpose for that area.

Elements of a good governance model include:

- the partners and operators have a clear sense of a vision for the destination
- the partners have a clear understanding of their roles and accountabilities and work together in that framework
- having teams with the right skills and experience to drive outcomes
- having access to the necessary financial, human and support resources they need to develop the destination.

Many trail destinations in Australia struggle to gain the necessary funding for ongoing maintenance. This is in part due to many trails being on land run by government agencies whose business models generally do not have fee for services or where the fees don't directly hypothecate back into a destination's maintenance.

Establishing and maintaining proper management, governance and financial sustainability of trail destinations is also vital to achieving the broader economic benefits associated with iconic trails experiences and increased tourism. Tasmanian trails experiences showcase Tasmania's natural environment and are recognised as an important driver of Tasmania's tourism and economic development recovery.

New models are being developed across Australia and New Zealand to help deliver strong financial security for trail developments.



New Zealand, Rotorua, Taupo and Nelson.

Council looked closely at three locations in New Zealand, Rotorua, Taupo and Nelson. In all cases the networks had been built and managed by enthusiasts within the local community. Some other observations were that funds are generated primarily through a membership model with there being over 4,000 members at Nelson; the business community had a very strong involvement in operating and developing the network because they knew what it meant to them; interestingly local government involvement was less than we expected and at times they struggled to gain the support necessary from councils.



Great Alpine Road

Great Alpine Road Marketing Inc., Victoria was established as an incorporated body representing a series of shires, Regional Tourism Organisations and other operators along the 400 km of the Great Alpine Road in Victoria. The group coordinated the further development and promotion of this significant touring route during its formative years, including establishing consistent infrastructure and signage on a range of land tenures. Funding came from contributions from partners as well as grants that were committed to implementing the development and marketing strategies for the benefit of all parties. Without incorporation, funds would need to have been managed within member agencies.



Queenstown Trails Trust

The Queenstown Trails Trust is an organisation with a purpose to raise funds for the development and growth of the trails network in Queenstown NZ (www.queenstowntrail.co.nz). It has a Board of Trustees that includes independent business people and land managers. They have been very successful in helping to deliver and grow over 120 km of trails on mixed land tenures around Queenstown and the Wakatipu Marketing Inc.

Break O’ Day Community and Industry Engagement and Support

In 2015 the Break O’Day Council opened trails in the Blue Tier/Weldborough area as part of the joint project which was undertaken with Dorset Council to establish the Blue Derby MTB Trail Network. Following this, Break O’Day worked on the next stage of creating trails with the construction of 110 km of high-quality mountain bike trails as part of the St Helens Mountain Bike Trail project. This also included the 42 km trail from the top of the Blue Tier to Swimcart Beach on the Bay of Fires and approximately 70 km in a Stacked Loops network just south of the St Helens township.

Local community engagement about plans, issues and opportunities helped ensure that the destination’s experiences were delivered by managers, businesses and the community. It also helped ensure that local needs are considered in the trail management and development.

The trails plan attracted millions of dollars in investment to the area through infrastructure, business and employment opportunities. This investment opportunity reinforced the commercial interest in the trail project and a willingness to invest both from within and outside the Break O’Day Community. This project has changed the North East Region and has transformed St Helens into the Mountain Bike Hub of Northern Tasmania.

“The Collective”

The Break O’Day Trails Collective Inc. “The Collective” was established in September 2019 to support the management of the St Helens MTB Trail Network. Into the future, it may have the capacity to include all trails, e.g. walking, cycling and more MTB trails.

The operational phase of trail management has a number of roles/functions/duties that need to be fulfilled by The Collective and other agencies such as Break O’Day Council, in order to ensure the trail network is fully activated and operating at its maximum potential.

The operation phase includes maintenance, activation and management and the ongoing development of the trail network. The trail network needs to continue to evolve with new product and experiences to encourage people to keep returning. Community, including local businesses need to take a future leading role in the network and project moving forward.

The Council has been the lead organisation in the development of the project and it has always been Council’s strong wish that in the future be more focused on support and delivering key maintenance functions while enabling the community to take the lead in managing and developing the St Helens MTB Trail Network while working in partnership with Council and other stakeholders (Pedal Heads MTB Club, schools, Parks and Wildlife Service, Sustainable Timbers Tasmania etc.).

Council's preferred model

A number of options were considered and an Incorporated Association "Break O'Day Trails Collective" was established. Council's vision is that The Collective could take some responsibility for managing the MTB Trail Networks within the following areas, including but not limited to:

- management and operations
- financial management
- seeking sponsorship/corporate advertising
- grant funding
- financial buy-in from businesses, community groups and individuals
- merchandise
- membership
- coordinate/organise events – in most cases this would be in consultation with Council's Community Services Department
- promotion
- attraction of events.

As an Incorporated Association the St Helens MTB Trail Network has its own identity and is operating as its own entity 'Break O'Day Trails Collective Inc.' to take away the perception that it is owned, managed and operated by Council for Council's own purposes. It provides a clear separation and a focus for the Network and its management moving forward.

To be successful, the Collective must have the support and buy in from the community, businesses and individuals from Break O'Day, in particular St Helens, as well as the wider MTB community.

The Break O'Day Trails Collective Inc. Model

The benefits of the Break O'Day Trails Collective Model include:

- it is community driven
- more support and ownership by the community
- it increases the opportunity to obtain external funding, including government grants
- potentially more revenue streams available
- creation of employment opportunities for trail management and a small level of maintenance, possibly through a volunteer type arrangement under the guidance of Councils Trail Maintenance Crew
- streamlined decision making.

Table 4. Proposed Signature Trails

PROPOSED AND EXISTING SIGNATURE TRAILS/EXPERIENCES	OUTCOME	PROGRAM PRIORITY	TIME FRAME
PROGRAM PRIORITY: Low Medium High = TIME FRAME: Short Medium Long Short = 1 year; Medium = 2 - 4 years; Long = 5 years +			
Georges Bay Trail (existing and proposed) A shared use trail continues from the popular St Helens Foreshore Trail to Akaroa and to links up with Binalong Bay and the Grants Point to Moulting Bay Walking Trail. A mapped adventure kayaking trail guide is developed for the Bay.	Local people and visitors will experience safe and comfortable cycling and walking on sustainable purpose-built trails and kayakers explore sea kayaking via trail guides and maps.	High	Long
Bay of Fires Lodge Walk (existing) Exceptional lodge, multi day walk and kayaking experiences.	The Bay of Fires Lodge Walk continues to be a renowned and sustainable multi-day guided walking experience. Clients recognise Break O'Day as a destination and are involved in post Bay of Fires experiences. Minor trail alignment issues on the headlands are resolved.	Medium	Medium
wukalina Walk with the Traditional Owners (existing) Located within Mt William National Park this multi day walk provides a remarkable mix of Tasmanian Aboriginal culture and great landscapes guided by Traditional Owners.	Interstate, overseas and local visitors experience the wukalina Walk as one of the best Tasmanian guided Aboriginal cultural trail experiences.	Medium	Medium
The Bay of Fires, Blue Tier and St Helens MTB Trails (existing). St Helens trails ranging from beginner (green) to intermediate (blue) as well as serious downhill (black), cross country flow and fun trails for the family. Also includes a shared-use connecting trail to St Helens. The Bay of Fires Trail is a 42 km mountain bike adventure trail.	The Bay of Fires, Blue Tier and St Helens MTB Trails continue to be popular destinations for Australian, international and local riders. The trails compliment and support the northeast as centre for sport development and expertise. Sustainable resourcing of trails is achieved through an effective governance model.	High	Long
St Patricks Head Walking Trail (proposed) This long-time favourite half day walk of the North East has spectacular 360-degree views of the Tasman Sea and Ranges. The road access and tough trail and climb to the summit limits this trail to experienced and fit Fingal Valley locals and visitors.	St Patricks Head becomes the iconic walking destination within the Fingal Valley with well-designed, sustainable and safe Class 3 walking trail infrastructure and good road and long-term public access.	Medium	Long
St Columba Falls (existing) The most popular waterfall experiences in the North East Tasmania, with 40,000 visitors annually.	The St Columba Falls continue to attract as part of a range of accessible and well promoted waterfall and Great Short Walks sites in Northeast Tasmania	Low	Long

Table 5. Proposed Supporting Trail Experiences

PROPOSED AND EXISTING SUPPORTING TRAILS/EXPERIENCES	OUTCOME	PRIORITY	TIME FRAME
PROGRAM PRIORITY: Low Medium High = TIME FRAME: Short Medium Long Short = 1 year; Medium = 2 - 4 years; Long = 5 years +			
Swimcart Beach to Binalong to St Helens (proposed) A proposed off-road shared trail to connect these coastal towns with the Grants Point Trail, the proposed Georges Bay Trail (see 1.1.10 above), the proposed Moulting Bay Cultural Trail (see below) and the Bay of Fires MTB Trail and St Helens.	Decisions are made on sustainable, and community supported future trail options. Safe and enjoyable walking and cycling is provided for locals and visitors between Swimcart Binalong and St Helens.	High	Medium
Moulting Bay Cultural Trail (proposed) A low impact, very accessible boardwalk foreshore and coastal forest trail at Moulting Bay or Clerk Point connected to the existing sandy track.	Tasmanian Aboriginal people experience their culture and living places via low impact boardwalk structures with minimal impact on the cultural living places that make this site attractive to Traditional Owners. Locals and visitors enjoy this step into Tasmanian Aboriginal culture and, through appropriate interpretation, appreciate the rich diversity of the landscape.	High	Short
The Nicholas Range Adventure Trail (proposed) A day and multiday walking experience provides the opportunity to overlook the Fingal Valley between Mt Nicholas and South Sister to the North of St Marys.	The Nicholas Range Adventure Trail provides a popular trail destination for locals and visitors who stay in the Fingal Valley Towns. Walkers are guided along the ridge-top trail, or they arrange for independent drop off and pick up from the towns. Interpretive experiences are linked to the unique Tasmanian bush and the Cornwall mining heritage.	Low	Long
Blue Tier Forest Reserve Walking Trails (existing) Easy, moderate and hard walking trails are located within the high country of Poimena.	Walking trails within Blue Tier Forest Reserve continue to grow in popularity and complement the Bay of Fires and Blue Tier Mountain Bike Trails, making this site a well-managed and popular trail destination.	High	Long
The Leeabarra, Douglas Apsley Multi Day Walk (existing). This once popular 2.5–3-day (28 km) Grade 4 bushwalking experience follows the Leeaberra Track. Currently the trailhead, waymarking and information is limited and the road access to the trailhead is not maintained.	The multiday walk has suitable trailhead and waymarking signs and appropriate vehicle access to the trail head is provided. This multiday trail is promoted and available to independent and guided walks as one of three popular multi-day walks in the Break O' Day region.	Medium	Short
The Break O'Day Tasmania's 60 Great Short Walks (existing) and waterfall trails. There are five great short walks within Break O'Day region; Apsley River Waterhole and Gorge, Evercreech 'White Knights' walk and waterfall, Goblin Forest Walk in the Blue Tier Forest Reserve, Ralph Falls and St Columba Falls. Break O'Day also has a number of other waterfall trails, including Mathinna Falls and Gray Mare's Tail.	The five Great Short Walks contribute to the mix and range of trails and continue to attract locals and visitors. The infrastructure is fit for purpose, well maintained and the attractions are accessible for users. The short walks collectively are part of Break O'Day trail attraction that are recognised and promoted and increase visitor numbers or result in increased length of time spent in the region.	Medium	Long

Table 6. Proposed and existing local trails/experiences

PROPOSED AND EXISTING LOCAL TRAILS/EXPERIENCES	OUTCOME	PRIORITY	TIME FRAME
St Marys to Cornwall Rail Trail (Proposed) The Fingal Valley disused railway has long been sought as a future rail trail for cycling, running, walking and as a link between towns. The full 20 km trail would require significant investment and engagement with lease owners and neighbours who farm the alignment. Initial recommendation is for a 5 km section to the mining heritage town of Cornwall.	St Marys and Fingal Valley community and visitors enjoy the benefits of access on a short 5 km shared rail trail experience to Cornwall. The trail provides visitors with interpretive experiences of the coal mining rail heritage loading site with opportunities for guided tours and shuttle bus access to the historic Cornwall Town.	High	Medium
Kings Park St Helens (Existing) A small reserve situated at the entrance to St Helens has links to the foreshore trail and the town. Past management has included ecological restoration and protection of the threatened grassy <i>Eucalyptus globulus</i> (Blue Gum) forest. The site is also recognised by Tasmanian Aboriginal people for its cultural significance.	Kings Park has a forward-looking management plan that incorporates protection of the important ecosystems, the cultural sites and provides enjoyment for locals, visitors and traditional owners through trail access for local people and visitors, connection with culture, nature and interpretation.	Medium	Medium
Winifred Curtis Reserve coastal walks Winifred Curtis Reserve coastal walks south of Scamander provide a network of trails for visitors and valued by the local community.	Scamander continue to have short walks amongst wildflowers, native plants and nature. These walking experiences backed up by volunteers continue to contribute to community wellbeing. Break O'Day and the community maintain these small reserves for passive recreation and contributing to local pride and activity.	Medium	Medium
Scamander River Trail (Proposed) A shared trail alongside from the bridge alongside the Scamander River. The proposed trail requires environmental assessment to ensure shorebirds and the estuary environment are protected.	Scamander has another interesting short walk for locals and visitors. The trail has been suitably assessed to protect ecosystems and provides an interesting contact with the river environment.	Low	Medium
The Fingal Valley Explorer Trail (Existing) Set within Fingal Town connects points of history and interest including cemeteries, churches, schools, historic buildings and pubs.	Fingal Town has a well-marked trail around the town that provides locals and visitors with a short walking tour. Locals enjoy the opportunity to walk the town and enjoy benefits gained from exercise and connection with people and place. Visitors enjoy the features of the town and contribute to town pride.	Medium	Medium
Additional waterfall and other trail experiences (Existing) Break O'Day has several remote trails and opportunities to experience nature, including waterfalls, with access and information challenges. These locations can provide special experiences for visitors and locals and would require local knowledge and at time approval for access or guided access.	Locals and visitors experience more remote adventure and heritage trails and waterfall experiences though guided access or independently via local advice and assistance. Fingal Valley becomes a centre for locally guided trail experiences with opportunity for a future waterfall loop including Meadstone, Harding and Meetus waterfalls.	Medium	Long

1.24 Cost benefit analysis

Michael Connell and Associates (MCA) provided an economic impact assessment of the Break O'Day trails network and a cost benefit analysis of the proposed new trails and improvements to existing trails. The results provide an indicative estimate of the benefits of the extended trails for walkers and mountain bikers.⁵²

Two types of analysis were undertaken: estimates of number of trail users (mountain bikers and walkers) and development of 10-year projections (based on growth in user markets and the extended/improved trails) and the total benefits to the region; and a benefit-cost analysis: estimation of the growth in trail users over this period to measure benefits compared with the proposed capital spending (\$6.995 million) on new trails and trail improvements.

The analysis of each of the trail user segments allows for a comparative assessment of the economic impacts of trail users on the Break O'Day regional economy.

Construction phase impacts

Construction costs for the trails development is estimated at \$3.665 million.⁵³ This includes new trail segments and upgrades to trails and infrastructure.

A total of 32.7 FTE jobs (27.3 direct jobs and 5.5 indirect/induced jobs) would be generated during the construction period. The direct jobs comprise 21.9 jobs in on-site construction and 5.4 jobs in materials/equipment supply.

Trails operations – users

- Mountain bikers on all the trails were projected to increase from around 86,700 in 2021 (base year) to around 128,300 in year 10 (2031) – growth of around 36,000 users. The major growth was in domestic overnight visitors (interstate and intrastate) and domestic day visitors (regional users).

- Walkers on all the trails were projected to increase from around 103,200 in 2021 (base year) to around 138,750 in year 10 (2031) – growth of around 35,500 users. The major growth was in domestic overnight visitors (interstate and intrastate) and domestic day visitors (regional users).

Trail operations – user spending

- Spending in the region by walkers increases from \$19.7 million in the base year (2021) to around \$26.5 million in year 10 (2031).
- Spending in the region by mountain bikers increases from \$12.3 million in the base year (2021) to \$18.3 million in year 10 (2031)
- Total spending by both trail users increases from around \$32.0 million in the base year (2021) to around \$44.8 million in year 10 (2031).

Trail operations – jobs generated

The estimates and projections indicate that trails (walking and mountain biking) are significant part of the visitor market in Break O'Day and adjacent areas, and generate jobs in local industries.

Trail visitor spending generates jobs in the region across several sectors:

- Trail users were estimated to generate a total of around 146 FTE jobs in the base year (2021) increasing to around 200 jobs in year 10 (2031).
 - MTB users of the trails were estimated to generate a total of around 56 FTE jobs in the base year (2021) increasing to around 81 jobs in year 10 (2031).
 - Walkers generate more jobs than mountain bikers. Walkers on the trails were estimated to generate a total of around 90 FTE jobs in the base year (2021) increasing to around 119 jobs in year 10 (2031).
- The jobs generated are mainly in recreation services (e.g., support – shuttles, guides, bike hire etc., and other activities), accommodation, food service transport and retail.

⁵² In this report walkers cover casual walkers on the trails, bush walkers and trail runners.

⁵³ Estimated trails development cost, TRC February 2022

Trail operations – regional income

Trail user spending provides a major boost to regional income (wage and salaries and business profits).

- Trail users generate around \$11.3 million in the base year (2021) increasing to around \$15.5 million in year 10 (2031).
 - MTB users of the trails generate around \$4.3 million in the base year (2021) increasing to around \$6.3 million in year 10 (2031).
 - Walkers generate around \$6.9 million in the base year (2021) increasing to around \$9.3 million in year 10 (2031).

Trail operations – other benefits

There are several other benefits that can be estimated for the trails. These are: health benefits and productivity benefits associated with exercise; and a consumer valuation of the trails experience (measured by a shadow price or the notional amount people would be willing to pay for a use of a trail).

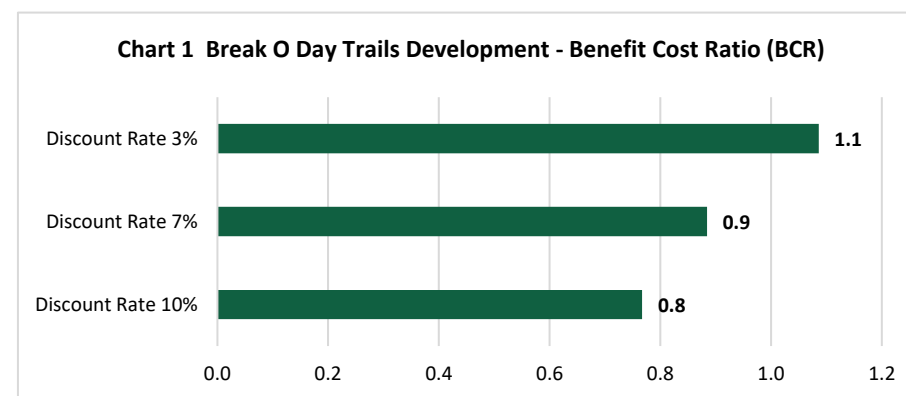
- Total other measured benefits increase from \$7.8 million in the base year (2021) to \$10.9 million in year 10. Total for 10 years is \$102.5 million.
 - Other benefits for mountain bikers increase from \$3.6 million in the base year (2021) to \$5.4 million in year 10 (2031). Total for 10 years is \$48.8 million.
 - Other benefits for walkers increase from \$4.2 million in the base year (2021) to \$5.6 million in year 10 (2031). Total for 10 years is \$53.7 million.

Benefit/cost analysis

All benefits and costs are analysed for a 10-year period for the trails development and improvements. The measured benefits are those associated with the growth in user numbers (from the estimated 2021 base numbers) over the 10-year period. Total trail users would increase by around 77,100 over the 10-year period (mountain bikers = 41,600 and walkers = 35,500). The benefits compared with costs are those associated with this projected growth in users.

The chart below compares Benefit Cost Ratios (BCR) for the 3 discount rates. The BCR for a 3% discount rate is 1.1, and for a 7% discount rate is 0.9.

Break O'Day Trails Development - Benefit Cost Ratio (BCR)⁵⁴



⁵⁴ MCA Modelling & Analysis March 2022

6 Strategic Priorities And Actions



1.25 Strategies and actions

Strategic priorities and associated actions have been developed for the Break O'Day Recreational Trails Strategy.

ACTIONS		Link to Objectives	Time Frame	
			Short = 1 year; Medium = 2 - 4 years; Long = 5 years +	
①	Trail infrastructure purpose built in exciting places for a range of users and to a high quality. Trails link the mountains to the sea and communities together. Trails have broad appeal for a diverse range of people of different capacities and abilities.	<div>1.1 Prioritise investment, management, maintenance and marketing through the Proposed and Existing Trails Hierarchy (presented in Appendix D and map Figure 1). SHORT</div> <div>1.2 Establish a range of walking trails suitable for local people to walk, run or ride close to or within towns for enjoyment and to contribute to community health and wellbeing. MEDIUM</div> <div>1.3 Provide improved trail attractions within the Fingal Valley to attract visitors and for enjoyment of local people including liaising with Tasmania Parks and Wildlife Service, and seek funding to upgrade the popular St Patricks Head Walking Trail. LONG</div> <div>1.4 Seek continuous improvement to the Bay of Fires, Blue Tier and St Helens MTB experience. SHORT</div> <div>1.5 Improve visitor access to trails including encouraging safe off-road cycling and take-up of shuttle services to reduce congestion and improve safety. SHORT</div> <div>1.6 Break O’Day Council together with land managers will provide where possible access-friendly trail experiences for a broad range of people including mobility-impaired visitors, to enable them to enjoy the Break O’Day landscapes independently or with assistance. Trails will be provided that consider the mobility impaired, vision impaired, elderly, infirm, and people with prams. MEDIUM</div>	<div>Continue Bay of Fires and St Helens as the Signature mountain-bike hubs in Tasmania’s North East.</div> <div>Deliver trail and adventure experiences and services to meet the needs of the local community and the visitor market and encourage people to visit and stay.</div> <div>Further develop partnerships with land managers and private landowners and find innovative ways to ensure a sustainable range of trail infrastructure that connects the extraordinary ranges and the coast.</div> <div>Secure public and private sector investment to ensure existing trails are well maintained and future trails are resourced whilst minimising impact on rate payers.</div>	Long term
②	Trails are financially, socially, and environmentally	<div>2.1 Continue to monitor the views and feelings of the broader community including MTB riders, walkers and local community members and encourage a shared partnership approach across the community e.g.,</div>	<div>Further develop partnerships with land managers and private land owners and find innovative ways to ensure a</div>	Long

ACTIONS			Link to Objectives	Time Frame
				Short = 1 year; Medium = 2 - 4 years; Long = 5 years +
	<p>sustainable. Trails have minimal environmental impact and contribute to regional biodiversity. Trails are supported by the local community.</p>	<p>through open days where local people can walk and explore the MTB trails.</p> <p>2.2 Continue strong partnerships between the Council, Tasmanian Parks and Wildlife Service and Sustainable Timber Tasmania and develop partnerships with landowners to ensure the future of a successful Break O' Day trail mix.</p> <p>2.3. Ensure detailed environmental investigations are undertaken very early in the planning and development process and contribute to regional biodiversity through restoration of new and existing trail corridors.</p> <p>2.3 Ensure trails are financially, socially and environmentally sustainable to ensure long-term viability with a strong focus on good trail design and sustainability of the assets to reduce costly maintenance of trails and risk.</p> <p>2.4 Leverage existing location and mountain biking, events and adventure sports to encourage the development of St Helens and North East Tasmania as a centre for sport development and expertise.</p> <p>2.5 Seek funding through grant opportunities and sponsorship for tourism infrastructure and community health to support the development and maintenance of the Break O' Day Council trail network.</p> <p>2.6 Seek Federal /and/or State Government contribution towards maintenance of priority trails to assist in ensuring that these premium products are maintained to the highest level reflecting that the whole state benefits from the trails not just the local community. (SHORT)</p>	<p>sustainable range of trail infrastructure that connects the extraordinary ranges and the coast.</p>	
③	<p>Trails provide greater recognition and opportunity for</p>	<p>3.1 Explore opportunities with Tasmanian Aboriginal Traditional Owners to further connect to the land and sea and provide opportunities</p>	<p>Deliver trail and adventure experiences and services to meet the needs of the local community and the</p>	<p>Medium</p>

ACTIONS			Link to Objectives	Time Frame
				Short = 1 year; Medium = 2 - 4 years; Long = 5 years +
	Tasmanian Aboriginal Traditional Owners to engage with their land and living places.	<p>where Aboriginal People are able to visit sites and have access regardless of ages or ability.</p> <p>3.2 Seek ways for the Tasmanian Aboriginal community to continue to demonstrate their living culture and impart their knowledge to local people and visitors.</p> <p>3.3 Break O'Day Council to continue to work with the Tasmanian Aboriginal Traditional Owners to ensure connection and protection of the land, sea and sites through consultation, planning and seeking permission and approvals to undertake appropriate future trail development work.</p>	visitor market and encourage people to visit and stay.	
④	Land manager partners, private landowners and community work together to build an accessible trail future across the landscape.	<p>4.1 Progress the Trails Collective Governance model and arrangements and seek to secure additional public and private resources to uphold service standards and maintain and develop the St Helens MTB Networks, and priority walking, running and shared-use trails identified within this strategy. (SHORT)</p> <p>4.2 Work with landowners to support long-term sustainable trail access arrangements across their lands for priority trails identified within this strategy.</p> <p>4.3 Encourage greater involvement of the broader community in the Trails Collective Governance arrangements while continuing the strong links to businesses and individual supporters. (MEDIUM)</p> <p>4.4 Continue monitoring trail use to measure user satisfaction, trail experiences, return on investment, and environmental considerations, and to plan for future investment.</p>	<p>Further develop partnerships with land managers and private land owners and find innovative ways to ensure a sustainable range of trail infrastructure that connects the extraordinary ranges and the coast.</p> <p>Secure public and private sector investment to ensure future trails are resourced whilst minimising impact on rate payers.</p>	Long
⑤	Trail marketing and promotion activities are coordinated across the	<p>5.1 Investigate future air access to St Helens via the existing air strip which would provide a significant fly-in, fly-out opportunity for trail users.</p>	Continue Bay of Fires and St Helens as the Signature mountain bike hubs in Tasmania's North East.	Medium

ACTIONS		Link to Objectives	Time Frame
			Short = 1 year; Medium = 2 - 4 years; Long = 5 years +
region to optimise visitor awareness of the trail network	<p>5.2 Continue to provide pre visit and on-site trail visitor information to ensure enjoyment, safety and comfort of visitors for priority trails and contribute to visitors and locals understanding of the limitations and challenges in accessing some hard-to-get-to trails. Strengthen - land manager partnerships approaches to trail marketing and visitor information and standardised trailheads and waymarking signage.</p> <p>5.3 Promote North East Tasmania and the Break O' Day Council area as the place of mild winters (Tasmania's warmest winter days), with less rain providing the opportunity for more trail use, including walking, in the shoulder seasons and during winter. (SHORT)</p> <p>5.4 Continue positioning, promoting and marketing of the mountain bike experience. Encourage appropriate use of the St Helens Mountain Bike Trails and the Bay of Fires Trails through online channels and provide up-to-date information for riders and the community.. The information centres at St Helens and within the Fingal Valley continue to provide visitors and the community with excellent pre-visit information.</p> <p>5.5 The Great Eastern Drive between Orford and St Helens is a popular route for visitors and should strongly connect with new and existing short walk and MTB opportunities identified within the Strategy.</p> <p>5.6 Leverage existing successful MTB-specific and other events to encourage new trail events including popular trail running. (SHORT)</p>	Deliver trail and adventure experiences and services to meet the needs of the local community and the visitor market and encourage people to visit and stay.	

7 Appendix



APPENDIX A. MOUNTAIN BIKE TRAIL TYPES AND RATINGS




Table 7. Mountain Bike Trail Types ⁵⁵

TYPE	DESCRIPTION
Cross Country (XC)	Primarily single-track oriented with a combination of climbing and descending, and natural trail features of varying technicality. Cross country trails appeal to the majority of the market and can also cater for timed competitive events. Typically, bikes are lightweight with shorter travel dual suspension or have no rear suspension.
Flow (FL)	Flow trails typically contain features like banked turns, rolling terrain, various types of jumps and consistent and predictable surfaces. Flow trails do not contain abrupt concerns or unforeseen obstacles. Bikes are typically light-medium weight with medium-travel dual suspension.
All Mountain (AM)	Similar to Cross Country and primarily single-track oriented, with greater emphasis on technical descents, with non technical climbs. All mountain trails can cater for timed competitive events. Bikes are typically light weight with medium-travel dual suspension.
Gravity/Enduro (GE)	Like All Mountain with greater emphasis on steep, fast, technical descents. Gravity/Enduro trails can cater for timed competitive events. Gravity/Enduro trails appeal to more experienced riders who enjoy technical descents but are still happy to ride back to the top of the trail. Bikes are typically medium to long-travel dual suspension and are built for strength.
Downhill (DH)	Purely descent only trails with emphasis on speed and technical challenge and focus on skill development. These trails can cater for timed competitive racing. Downhill trails usually require uplift to the trailhead via chairlift or vehicle shuttling. Bikes are designed for descending and are typically long travel dual suspension and built for strength over weight.
Freeride (FR)	Typically, descent focused trails with emphasis solely on technical challenge and skill development. Trails feature both built and natural terrain technical features with focus on drops and jumps. Appeals to the more experienced market and caters for competitions judging manoeuvres and skills. Bikes typically medium to long-travel dual suspension and are built for strength.
Park (PK)	Built feature environments with an emphasis on manoeuvres, skill development and progression. Appeals to a wide market including youth and can cater for competitions judging aerial manoeuvres. Can include Jump and Pump tracks and Skills Parks. Typically, dirt surfaced but can include hardened surfaces. Bikes are typically built for strength, with short travel suspension.
Touring (TO)	Typically, long distance riding on reasonably uniform surface conditions and lower grades. Touring trails are dual direction linear trails or long-distance circuits with focus on reaching a destination. Touring trails can include rail trails, access/fire roads and single track. While there is a limited market for long distance mountain biking, touring trails can be ridden in sections making them accessible to all. If carrying panniers bikes are usually robust with limited suspension, however, for short sections or day trips most mountain bikes are suitable.

⁵⁵ Australian Mountain Biking Trail Guidelines

MTB Trail difficulty ratings






- The Trail Difficulty Rating System (TDRS) provides seven levels of difficulty for mountain bike trails. The TDRS enables visitors to understand the nature of the trail before beginning their ride and allows them to plan their ride for enjoyment, appropriate level of challenge and safety.
- Trail ratings can be communicated in several ways. Pre-visit information may include a more detailed description of the ratings, while a shorter description is required for trailhead signage and maps. Rating colours should be used on all on trail directional signage. Mountain bike TDRS short trail descriptors should be used at trail signage, on brochures and maps or similar applications.
- The use of the bike in the centre of each symbol is optional and will likely depend if the trail network consists of multiuse and shared use trails or single use.⁵⁶

Difficulty Symbol	Short Description
	Very easy Wide trail with a gentle gradient smooth surface and no obstacles Suitable for beginner cyclists with basic bike skills, and most bikes
	Easy Wide trail with a gentle gradient smooth surface Some obstacles such as roots, logs and rocks Suitable for beginner cyclists with basic mountain bike skills, and off-road bikes
	Easy with Intermediate Sections Likely to be single track with a moderate gradient, variable surface and some obstacles Some obstacles such as roots, logs and rocks Suitable for mountain bikers with mountain bikes
	Intermediate Single trail with moderate gradients, variable surface and obstacles May include steep sections Suitable for skilled mountain bikers with mountain bikes
	Intermediate with Difficult Sections Suitable for competent mountain bikers, used to physically demanding routes Expect large and unavoidable obstacles and features Challenging and variable with some steep climbs or descents and loose surfaces
	Difficult Suitable for experienced mountain bikers, used to physically demanding routes Navigation and personal survival skills are highly desirable Expect large, dangerous and unavoidable obstacles and features Challenging and variable with long steep climbs or descents and loose surfaces Some sections will be easier to walk
	Extreme Suitable for highly experienced mountain bikers, used to physically demanding routes Navigation and personal survival skills are highly desirable Severe constructed trails and/ or natural features, all sections are challenging Includes extreme levels of exposure and / or risk Expect large and unavoidable obstacles and features Some sections will be easier to walk

⁵⁶ <https://www.ausccycling.org.au/nat/news/australian-trail-difficulty-rating-system-revised>

Walking Trail difficulty ratings

- The Tasmanian Parks and Wildlife Service (PWS) uses the Australian Walking Track Grading System to inform the public as to the difficulty of a trail. (Opposite)
- The PWS also use a more in depth trail classification system which is used predominantly internally to rate their tracks. This is outlined in their Track Class Policy.
- A comparison of the two systems is shown below.

Australian Walking Track Grading System	
	Grade 1: No bushwalking experience required. Flat even surface with no steps or steep sections. Suitable for wheelchair users who have someone to assist them.
	Grade 2: Suitable for most ages. The track has a hardened or compacted surface that may have a gentle hill section or sections, and occasional steps.
	Grade 3: Some bushwalking experience recommended. Tracks may have short steep hill sections, a rough surface and many steps.
	Grade 4: Bushwalking experience recommended. Tracks may be long, rough and very steep. Directional signage may be limited.
	Grade 5: Only suitable for very experienced bushwalkers with specialised skills, including navigation and emergency first aid. Tracks are likely to be very rough, very steep and unmarked.

Comparison of the PWS and AS 2156 track classification schemes

PWS	W1	W2	T1	T2	T3	T4	R
AS 2156	1	2	3	4	5	6	

APPENDIX B. CASE STUDIES

CASE STUDY: QUEENSTOWN TRAIL

Queenstown Trails are a successful example of visionary planning to respond to changing trends and extend the trails offering. An initial strategy was developed in 2004 to guide development of a world-class 190+ km network of walking, hiking and biking trails across multiple tenures in the iconic nature-based and adventure destination of Queenstown. This trail network became an important local and tourism asset, with 90% of the plan having been implemented.

In 2015, a new strategic plan to guide the next 10-year phase of trail development and management was developed. In close consultation with trail stakeholders and community, outcomes of the first strategy and changes affecting use of the trails were analysed, and a vision and performance target were agreed.

The new plan consolidated work completed to-date and looked to respond to new opportunities not foreseen 10 years before. It also provided a solid footing for further growth in the trail use across the region and addressed the need to complete trail linkages for local resident and visitor use; strategies to improve trail experience delivery; ways to promote increased use and community stewardship of trails; improved information gathering; and sources of sustainable funding for trails development and management.

The Queenstown Trails are undeniably a part of the success of the tourism industry in Queenstown, with visitation growth and spending at record levels. Queenstown was the South Island's number one visitor destination in 2018.⁵⁷

⁵⁷ Radio NZ Article 28th January 2019
<https://www.radionz.co.nz/news/national/381129/queenstown-remains-top-south-island-destination>

The Queenstown Trails Trust Trail Count Report dated 3 April 2017 reported that there have been 'a total 1,294,144 trail journeys and 5,758,941 total trail movements (clicks) since opening in October 2012, this includes 114,982 journeys so far in 2017, compared to 109,538 in the same period in 2016, a 5% increase year on year.'

In late 2018, Google mapped 120 km of the trail to bring the trails into the digital age and publish the hiking and cycling tracks online.

Further expansions to link the resort's outer suburbs were planned in 2019, with the first stage of building works expected to start by the end of that year.

Queenstown Trails are also currently part of a new project which will connect four existing Great Rides and link 30 communities along a 530 km continuous cycle-trail network across Otago. The Government has committed over \$13 million in funding for this proposed extension, which will be matched by local funding to reach the total \$26 million required.

Much of the trail network is managed by a partnership between the Queenstown Lakes District Council, the Department of Conservation (DOC) and the Queenstown Trails Trust with input from community groups, user groups and businesses.

There has been extensive development of trail-related products, packages and events. This includes links to existing food, beverage, accommodation and tourism attractions (such as wine tasting, historic attractions and bungy

jumping) and the emergence of new businesses that provide guided tours, shuttle services, bike hire, retail and event services.

In addition, the trails are a significant local recreation, health, outdoor education, transport and economic development asset for the local population which is projected to increase from about 30,700 people in 2015 to 57,000 people in 2025⁵⁸. About 40% of users of the Queenstown Trails are residents.

Sustainable funding sources for further development of the trail network and its ongoing maintenance is an important challenge for the Queenstown Trails Trust and its partners. The Trust has largely relied on fundraising activities, donations and returns from events to obtain funds, in addition to an annual contribution from Council. The 2015-2025 Strategic Plan recommends that the Trust diversify its revenue sources with mechanisms used by other trail management bodies including sales of maps and apps, operator contributions to trail maintenance and returns from concessions.

A survey of Queenstown Mountain Bike Club members and trail users in 2016/17 indicated a range of economic impacts resulting directly from the Queenstown Mountain Bike trails:

- Mountain bike trail users were estimated to spend \$64 million per year in the Queenstown region. This spending covered bike-related expenses, food and beverage, other retail spending, other adventure tourism spending and for overnight visitors, spending on accommodation.
- The trails generate a total of \$25 million in income for the Queenstown region annually.
- The operation of the trails and the users are estimated to generate a total 335 FTE jobs in the region (both direct and indirect).

Review of Economic Impact of Queenstown Mountain Bike Trails Draft Report May 2017



⁵⁸ Queenstown Lakes District Council ((2015). Long Term Plan 2015.

CASE STUDY: TASMANIA'S NEXT ICONIC WALK – TYNDALL RANGE, TASMANIA

The Final Tasmania's Next Iconic Walk Feasibility Study was released by the Tasmania Parks and Wildlife Service (PWS) in July 2021. The Study explored the feasibility of Tasmania's next iconic multi-day hut-based walk and sought to further build on Tasmania's reputation as being Australia's first choice walking destination, to complement and expand the offering of walking experiences and providing more reasons to visit Tasmania.

The Study indicates there is demonstrated demand for such a walk and having another multi-day walk in the suite of walks already available will enable visitors and Tasmanians alike to customise their adventure, considering their interest, capability and available time.

This first stage of the project was to test the feasibility of different walk locations and development options which included inviting the public to identify possible new walks in Tasmania and market testing walking experiences to understand their potential appeal and likely participation if a walk were developed.

In 2018, the public was invited to identify locations and ideas for a new Tasmanian multi-day walk (PWS, 2018). The aim was to capture the community's best ideas, knowledge and experience. More than 1,900 individuals, and many Tasmanian businesses, contributed their ideas and thoughts about a new walk,

In total, 35 possible locations were suggested: 24 identified by the public, and 11 by the PWS through existing research and knowledge. These were then assessed for potential and impediments in relation to visitor, environmental, economic, community, and operational considerations.

The Tyndall Range was identified in two public proposals and selected for its outstanding potential and manageable constraints. 50 walk options in and around the Tyndall Range were identified.

Field surveys identified landscape features, possible walking routes, and the ecology of the Tyndall Range.

Potential benefits, costs and risks were also considered.

The recommended track corridor is (subject to detailed investigation to optimise the walking experience and to manage environmental constraints) Anthony Road, west of Lake Plimsoll, Glacier Valley, Huntley Lookout, Lake Huntley (overnight accommodation), Lake Malcolm, Lake Mark, Lake Magdala, east of Mt Geikie (overnight accommodation), north of Lake Margaret, and along the penstock pipeline to Lake Margaret Power Station.

The Tasmanian Government has committed to nearly double the funding already committed, increasing it to \$37 million to make the proposal a reality.

As at September 2021, detailed design work had commenced on planning, hut concept designs and approvals, before the project will be assessed through the Reserve Activity Assessment process, and the public given the opportunity to provide feedback.

The earliest date expected for practical completion and transition into operations is April 2028, and the latest August 2029 (subject to further planning, design and more detailed investigation).

LESSONS FOR BREAK O'DAY

- Recommended option is 3-day/2-night through walk, with higher-standard roofed accommodation and camping facilities.
- Overnight accommodation provided at huts accommodating 30 walkers each. Camping could also be considered.
- Through walk preferred by visitors interested in multi-day walking when compared to a return-walk option.
- The Tyndall Range was selected for its extraordinary, spectacular and dramatic landscape.
- Walkers expect an experience specifically designed for their preference.
- Significant investment, but returns will be generated over years of new visitation and economic activity within the region.
- Additional local business opportunities will be created: equipment hire, pre/post accommodation, shuttle services.



CASE STUDY: EAST COAST TRAIL – NEWFOUNDLAND, CANADA

SNAPSHOT

The East Coast Trail is a 300 km footpath along the meandering coastline of Newfoundland's Avalon Peninsula, passing through 30 coastal communities. Split into 26 separate paths, each trail has distinctive topography, history, and surprises – colourful fishing villages, fjords, lighthouses, ecological areas, icebergs, a suspension bridge, and the first sunrise in North America.

There are over 14,000 visitors completing over 65,000 hikes a year on the trail.

Non-resident hikers contribute over \$3.5 million annually to the local communities along the trail, with tourism a critical revenue source.

GOVERNANCE

The East Coast Trail on Newfoundland's Avalon Peninsula is managed by the East Coast Trail Association. (ECTA)

The ECTA is a registered charity established to provide a wilderness hiking experience by developing and maintaining the East Coast Trail, promoting public access, minimizing its impact on the natural environment and protecting it for future generations. The long-term sustainability of the trail is not a challenge that can be solved by the East Coast Trail Association alone. The trail covers private land and public land. Ensuring its sustainability is a complex and demanding legal challenge for a small charitable organization. The association has membership levels starting at \$25 and asks for donations.

Investments by the Government of Canada and the Government of Newfoundland and Labrador (\$1.2million) in the East Coast Trail Association (ECTA) will help to further support trail upgrades and generate 60 weeks of employment for 18 trail crew.

ISSUES

The ECTA have identified five strategic challenges that are critical to long-term success: communications, funding, trail management, volunteerism and governance. The effective resolution of these challenges is conditional on the engagement and active involvement of stakeholders in the management of the trail.

MARKETING AND COMMUNICATIONS

Two critical goals for the East Coast Trail are funding to sustain the trail and delivery on its mandate and mission. Not-for-profit, charitable organizations like the East Coast Trail cannot accomplish their missions effectively or attract funding and resources without the support and commitment of many stakeholders. Marketing and communications provide a road map and tools to develop and build that engagement, support and commitment.

The issue cited most often in the membership survey, volunteer focus groups and other stakeholder consultations was the need for improved, regular and sustained communications and marketing efforts. Members value engagement and information about the trail and the work of the association and its board.

FINANCIAL RESOURCES FOR LONG-TERM SUSTAINABILITY

Like many other charitable, not-for-profit organizations, the East Coast Trail Association is struggling to find the financial resources required to carry out its mission. The Trail has a reputation for an outstanding coastal hiking trail and received international recognition as one of the 10 best adventure destinations in the world. The trail is now a critical aspect of the province's tourism infrastructure.

However, the current funding model cannot sustain the existing 265 km of developed paths from Cape St. Francis to Cappahayden. They need to secure funding for the long term to ensure that the ongoing management and operation of the trail remains financially sustainable.

MAINTENANCE, ENHANCEMENT AND PROTECTION

It is vital, though increasingly difficult, to keep pace with the current demand to meet hiker expectations and keep the trail in a safe condition. Extreme weather events erode coastline paths and knock down thousands of trees that need clearing each year. Ensuring that the trail and its environment are protected is critical to maintaining the trail's wilderness hiking experience for tourists and residents alike.

VOLUNTEERISM

Volunteers give stamina to the East Coast Trail Association. They develop policies and standards, monitor trail conditions, plan trail operations, slash brush, edit newsletters, update the website, monitor social media accounts, publish maps and guidebooks, lead guided hikes, raise funds, support administration, advocate in municipal land-use planning, provide legal guidance, attend public events, give direction, participate in committees and promote the association in numerous ways. Volunteers are passionate friends of the trail and are essential to its success.

GOVERNANCE AND STRUCTURE

The association is based on a governance structure that was implemented in 1994. Though enhanced over the years, challenges remain. The trail maintenance program is struggling to meet the demands of a 265 km trail; the work demands placed on our core volunteer committees cannot be supported over the long term.

Changes to governance are required to manage these challenges effectively and to sustain the trail. An improved governance model will include policies, decision-making processes, systems and organisational structures that enhance the support needed to manage the association.

Sources:

- www.macsadventure.com/holiday-2421/hiking-newfoundlands-east-coast-trail#
- www.eastcoasttrail.com/en/choose-your-path/points-of-interest.aspx
- www.newfoundlandlabrador.com/things-to-do/hiking-and-walking
- www.canada.ca/en/atlantic-canada-opportunities/news/2017/05/east_coast_trailassociationreceivesgovernmentfunding.html

www.ectthruhike.com

LESSONS FOR BREAK O'DAY

- Significant contribution to local communities through visitation and use of the trail (\$3.5M annually).
- Governance and trail management through the East Coast Trail Association (charitable entity). Funded through membership, donations and government grants – not an ongoing reliable source of resourcing and consideration of future trail governance and management is required.
- Volunteers are important through promotion and advocacy of the trail, generating funds, sharing news and stories, trail representation, undertaking administrative and maintenance functions, developing policies and driving passion for the trail.
- Trail covers a mix of private and public land which also creates management issues.



APPENDIX C. POTENTIAL AND OPPORTUNITY FOR TRAIL DEVELOPMENT

TRAIL INFRASTRUCTURE, DESIGN, SUPPORT FACILITIES AND MANAGEMENT		
FACTORS THAT CREATE A GREAT TRAIL DESTINATION	HOW BREAK O'DAY PERFORMS AS A TRAIL DESTINATION	SUGGESTED IMPROVEMENTS
Diversity of trail types, styles and destinations	<p>Mountain Bike Trails Successful MTB destination with eight loops at Flagstaff ranging from beginner (green) to intermediate (blue) trails as well as the Townlink, a multi-user, dual directional trail that connects the township of St Helens to the Trailhead at Flagstaff, two blue descents and three black descents. Included are serious downhill, cross country flow or fun trails for the family. The Bay of Fires Trail is a 42 km mountain bike adventure trail from the Poimena Trail Head within the Blue Tiers Forest Reserve to Swimcart Beach on the Bay of Fires. The trail passes through some beautiful, but isolated areas. The MTB Survey of November 2021 reflected positively on the variety of trails with some additional trails across types and styles sought. The addition of a pump track and skills park were identified by respondents as facilities they are seeking.</p> <p>Walking and Other Trails Short walks available including waterfall and coastal walking. The Northeast includes eight examples of 60 Tasmanian Great Short Walks with four within Break O' Day. Established guided and independent multi day walking includes the Bay of Fires Lodge Walk and wukalina Walk along the coast and inland within Mt William National Park. Independent multi day walking is available in the Douglas Aspley National Park however vehicle access to the trail head is restricted due to the removal of an old timber bridge. There are walks available within the Fingal Valley and St Marys area however these are restricted by vehicle access issues or aren't developed to suit a range of walking ability. There are few opportunities for local people to walk, run or ride close to or within the towns.</p>	<p>The recent MTB survey provides a range of suggested improvements. Many of these are being implemented including new trails. Plan for recognition as IMBA Epic Trail and Mountain Bike Town location which will contribute to the Northeast becoming an IMBA trail hub. Development of a pump track and skills park will provide increased benefit to the overall experience.</p> <p>Requires a range of walking trails suitable for local people to walk, run or ride close to or within the towns.</p> <p>Requires good and long-term access to trails.</p> <p>Improved trail attractions the Fingal Valley and continue great multi day walking experiences</p> <p>Provide trails with a focus on Tasmanian Aboriginal culture.</p> <p>New trail experiences should be explored that reflected the Break O'Day character including kayaking trails.</p>
Concentration of trail opportunities	<p>The St Helens Mountain Bike Trails provide a mix and concentration of trails in remarkable scenery. The connecting shared use trail provides the off-road connection with the town. The Bay of Fires (42 Km from Blue Tier to Bay of Fires) complements the variety of trails.</p> <p>Walking has improved within St Helens with the introduction of new sections of the shared use foreshore trail. Further expansion of the trail network around Georges Bay would connect the communities and provide local and visitors with expanded experiences. Further improvements to off road connections to the</p>	<p>Development of proposed new trails and suitable located future pump track and skills park will contribute to a good concentration of MTB opportunities.</p> <p>Increase the concentration of trails for locals and visitors within the St Helens and Georges Bay area.</p> <p>Provide a mix of trail experiences in the Fingal Valley that are popular with visitors and the local valley community.</p>

TRAIL INFRASTRUCTURE, DESIGN, SUPPORT FACILITIES AND MANAGEMENT

FACTORS THAT CREATE A GREAT TRAIL DESTINATION	HOW BREAK O'DAY PERFORMS AS A TRAIL DESTINATION	SUGGESTED IMPROVEMENTS
	<p>north through to Binalong and Georges Bay would contribute to the St Helens becoming the hub for trail activity and an attractive trail town.</p> <p>The Fingal Valley and St Marys area has some spectacular trail experiences and opportunities including St Patricks Head and South Sister. The trail experiences are however uncoordinated with few trail within or radiating out from the towns for locals and visitors.</p> <p>The Beaumaris, Scamander and Falmouth areas to the south have an assortment of beach access points with some connecting trails and a developing system of shared use footpaths.</p>	<p>Explore new connecting trails within the Beaumaris, Scamander and Falmouth areas that connect visitors and locals with the coast whilst ensuring shore bird and environmental protection</p>
High quality, sustainable trail infrastructure	<p>Growing trail users demand is for trails that are fit for purpose, provide enjoyment, long lasting have low maintenance requirements and contribute to healthy ecosystems. MTB trails are maintained at a high standard and the popular and recognised trails such as four of the 60 Great Short Walks are maintained. Other trails are less so due to restrictions on budgets and the need to maintain service standards.</p>	<p>Identify the priority trails and focus on these to maintain the experience.</p> <p>Ongoing MTB trail maintenance is a priority and identified during the user survey. Future sustainable maintenance resourcing is required.</p> <p>Governance including the Trails Collective will contribute improvements in sustainably resource trails is a priority.</p>
Leading (Signature), supporting and local trails	<p>Mountain Bike Trails</p> <p>The Bay of Fire Mountain Bike Trail is a Signature Break O' Day trail providing the attraction and draw to visitors complimented by the St Helens Mountain Bike Trails. These trails are clear examples of Leading, supporting and local trails that contribute to an exceptional mountain bike destination.</p> <p>Walking and Other Trails</p> <p>Leading trails include the multi day Bay of Fires Lodge Walk experience between Boulder Point near Ansons Bay and Stumpy's Bay and the wukalina Walk palawa traditional owners owned and led guided experience. The Bay of Fires Lodge Walk provides the draw to visitors and provides Signature recognition whilst the wukalina Walk has the potential to be one of the special traditional owner led cultural experiences within the Mount William National Park.</p> <p>The spectacular St Columba Falls has the pulling power to persuade a visitor to come to the Break O'Day evidenced by the 40,000 visitors per year. Situated some 35 Kilometres west of St Helens near Pyengana it is the most popular Tasmania's 60 Great Short Walks Located within the Break O'Day Council area.</p>	<p>There is a need to identify the trail priorities within the signature supporting and local trails into the future.</p> <p>The Strategy will identify these and enable managers to prioritise resourcing and commitments.</p> <p>Through consultation, planning and permission there is opportunity for Increased recognition and opportunity for Traditional Owners, locals and visitors to experience Tasmania's Aboriginal living places through appropriate trails.</p>

TRAIL INFRASTRUCTURE, DESIGN, SUPPORT FACILITIES AND MANAGEMENT		
FACTORS THAT CREATE A GREAT TRAIL DESTINATION	HOW BREAK O'DAY PERFORMS AS A TRAIL DESTINATION	SUGGESTED IMPROVEMENTS
	<p>The Apsley River Waterhole and Gorge, White Knights or Evercreech walk and Ralph Falls provide the other waterfall and waterholes walks that support Break O' Day as a trail destination.</p> <p>Local trails generally close to, within or between towns and are popular with residents with calls for more or improved local trails evidenced through community consultation. The Fingal and St Marys area within the Valley have potential for improved trails for local people and as an attraction for visitors particularly due to the historic themes and location within the valley.</p> <p>The Poimena Blue Tier walking trails provide some good supporting regional trails ranging from 20 minutes to 6 hours and provide glimpses of the tin mining heritage in this alpine setting attractive to visitors and locals.</p>	
Accessibility	<p>Access to the St Helens Mountain Bike Trails is excellent through the Flagstaff Trail Head and via the shared town trail to and from St Helens. Vehicle access both for independent visitors and shuttles to the hills and trail heads above the Flagstaff Trail Head is via forest roads often shared with forest and quarry trucks. Access to the numerous designated walking trails is across a mix of Tasmania Parks and Wildlife Service, Sustainable Timber Tasmania and Council managed roads. Some of the known waterfall trails and previous popular day and multi day walks have restricted access due to bridges being unsafe and being removed and forest roads being unsuitable for visitors.</p> <p>General access to some of the supporting trails identified is often not suitable for visitors vehicles particularly when travelling in motorhomes or small cars.</p> <p>Response to the community consultation indicated a desire for local trails close to home without the need for driving. There is also a strong desire for local trails suitable for people with disabilities, older people and mothers with prams for exercise and enjoyment.</p> <p>Some popular trail experiences rely on access across private land. The support provided by landowners enables visitors to access these trails. These landowners are recognised for their contribution to community benefit. Future long term sustainable access for these and future trail opportunities should be explored.</p>	<p>The identification of priority trails will require commitment to providing suitable access for locals and visitors.</p> <p>Future air access to St Helens via the existing air strip would provide a significant fly in fly out opportunity for trail users.</p> <p>Visitors and locals will need to understand the limitations and difficulty accessing some less priority trails.</p> <p>Some priority trails have access through private land. This is working with landowners supporting sustainable trail access which works well however long term access and investment may require more permanent access arrangements.</p> <p>Continuous improvement of shuttle services both self-shuttle and encouragement of paid for shuttle services will contribute to reducing congestion and improve safety.</p>
Effective governance, coordination and management	<p>Multiple agencies contribute to the delivery of great trail experiences and the challenges of resourcing and managing these existing trails is recognised.</p> <p>Concern was expressed through the consultation process about the perception of</p>	<p>Governance arrangements that provide additional resources and encourage less of a Council focus on the MTB Network and its management would be beneficial.</p>

TRAIL INFRASTRUCTURE, DESIGN, SUPPORT FACILITIES AND MANAGEMENT

FACTORS THAT CREATE A GREAT TRAIL DESTINATION	HOW BREAK O'DAY PERFORMS AS A TRAIL DESTINATION	SUGGESTED IMPROVEMENTS
	<p>amount of public funds used for the management of trails. Tasmania Parks and Wildlife Service, Sustainable Timber Tasmania have limited resources and are reluctant to take on new assets and responsibilities to properly manage current trail assets.</p> <p>Future governance and resourcing arrangements and partnerships have been developed that provide for the sustainable management of trail experiences that will also provide evidence of benefit for communities.</p>	<p>Future governance and management arrangements will need to develop support from the broader community whilst continuing the strong links to businesses and individuals. Future governance should seek to include the broader Break O'Day trails and further develop relationships between Council and important land managers.</p>
Community and industry engagement and support	<p>The community have indicated (through the consultation process for the Strategy) support for an upgrade of some existing trails and a limited number of new trails. There was strong support for trails in Fingal Valley and St Marys for local community use and to attract visitors. The single use nature of mountain bike trails contributes to their popularity and success. Opportunities were discussed for more cooperation and some limited access to some mountain bike such as open days where walkers and trail runners can experience the beauty of the trails and develop a greater understanding and involvement in the mountain bike trails the trails.</p> <p>There has been a strong focus on developing the mountain bike trails which now are in full swing and popular with locals and visitors. The St Helens Mountain Bike Trails - Rider Survey The mountain bike trails have seen strong support from the mountain bike community and business reflected in the support for the Trail Ambassador Program. The Trails Collective Inc provided governance and financial contribution to the ongoing maintenance and development of the trail network contributing to the premium riding experience.</p> <p>The support of the community is important in developing future trails and the spirit developed during the recent Drop in Sessions and Break O' Day Trails Survey should be followed through with staged delivery of a new trail focus.</p>	<p>Continued development on The Trails Collective Inc and governance arrangements will need to include innovative sustainable resourcing solutions incorporating volunteerism and continue to encourage community support for MTB trails. The continued engagement and introduction of a small selection of walking trails across the broader community area will improve the understanding that Council is receptive to broader trails needs, desires and benefits of all trails will be important.</p>
Trail Maintenance and Day-to-Day Management	<p>The maintenance of trails and of the trail experience is important for the future of trails, the environment, landscape and the community. The mountain bike experiences have continued to be popular and have contributed significantly to the local economy. The important land managers within the Break O' Day community are where many of the existing and future walking trails are placed. Responsibility for future management and maintenance will rest with these land managers and it is important to ensure that trails and structures are designed</p>	<p>Initiatives such as The Trails Collective Inc and programs such as the Trail Ambassador Program will be important to ensure day to day management is maintained.</p> <p>Strong liaison and coordination with land managers is important to ensure a sustainable future for trails</p> <p>Volunteers have an opportunity to play an increasing role in promotion and advocacy across the growing range of trail</p>

TRAIL INFRASTRUCTURE, DESIGN, SUPPORT FACILITIES AND MANAGEMENT

FACTORS THAT CREATE A GREAT TRAIL DESTINATION	HOW BREAK O'DAY PERFORMS AS A TRAIL DESTINATION	SUGGESTED IMPROVEMENTS
	<p>and built to the very best trail practice therefor ensuring not only a great trail experience but an experience that doesn't place management of maintenance burdens on the agency. Good governance and shared responsibility will need to be a future for Break O'Day Trails.</p>	<p>activity and to generate networks and understanding across these activities. Volunteers will continue to have an important role increasing role in funds generation, sharing trail news, information and stories, developing policies and driving passion for the trails.</p>
Distinctive experiences	<p>The Break O' Day landscape includes some remarkable and distinctively North-eastern Tasmanian views, experiences, culture and environments. The landscape of the Fingal Valley is dominated by the ridges, ranges and peaks that look over the valley and to the east the ocean. The climb up St Patricks Head is rewarded by stunning 360° views of ranges, valleys and the north east coast and the Tasman Sea and based on views expressed during consultation one of the community favourites. The ridge tops that surround the valley provide opportunity to explore short or longer distance walking of trail running experiences whilst the coal mining history and waterfalls provide distinctive themes for trails and interpretation.</p> <p>Successful MTB destination Includes serious downhill, cross country flow or fun trails for the family and the 42km Bay of Fires Trail from the Poimena to Swimcart Beach on the Bay of Fires make for a distinctive Northeast Tasmanian Mountain bike experience. The beautiful and remote areas are all part of the unique and distinctive experience whilst the new trails planned within St Helens reflect an increasing diversity of trails.</p> <p>The traditional owners of the land recognise many of these features in the landscape through cultural stories and as boundary markers on the land. The coastal rainforest and tidal flats and cultural living place around Georges and Moulting Bay are places to be protected but also provide opportunity for improved access for traditional owners and visitors to the land.</p> <p>Poimena and waterfall trails and some rain forest walks are well represented. Coastal trails are represented but may need review to avoid coastal impacts. Multi day walks have been provided through Bay of Fires Lodge Walk and the wukalina Walk however the popular Douglas - Apsley National Park multi day walk has been restricted due to the removal of a bridge on the access track.</p>	<ul style="list-style-type: none"> • Fingal Valley is dominated by the ridges, ranges and peaks that look over the valley and to the east the ocean. Appropriate and enjoyable trails where people can be involved in these special places by trails is important. • The differing land and sea scapes need to be presented to visitors and locals via a range of trails that suit users needs. • The success of the MTB destination is based on the landscape, the rage of trails and the trail culture. Break O'Day reflects this in the distinctive experiences. • There is opportunity through distinct short cultural walks and through the multi day wukalina Walk promote distinctive Tasmanian Aboriginal cultural experiences shared by traditional owners, locals and visitors. • The distinctive Bare Rock is a draw for climbers and could see the Fingal Valley become an attractive place for climbers and associated visitors to visit and stay in Fingal. • The strong presence of Tasmanian Aboriginal culture within the region is reflected in the numerous sites and living places. Trails that both provide access for Aboriginal people to areas important to them and to introduce visitors to these site will provide unique and distinctive trail experiences.

TRAIL INFRASTRUCTURE, DESIGN, SUPPORT FACILITIES AND MANAGEMENT

FACTORS THAT CREATE A GREAT TRAIL DESTINATION	HOW BREAK O'DAY PERFORMS AS A TRAIL DESTINATION	SUGGESTED IMPROVEMENTS
	The rock climbing at Bare Rock out of Fingal is emerging as one of Tasmania most popular climbs. Not technically a trail experience however the attraction of Bare rock as a destination for walkers is significant.	
Quality pre-trip information	The St Helens Mountain Bike Trails and the Bay of Fires Trail have an excellent online focus providing up to date information for riders and the community. The information centres at St Helens and within the Valley provide visitors and the community with some excellent pre visit information. With future trail developments and with current experiences it will be important to continue the presentation of quality pre visit information to ensure people are getting the very best, safe and issues free experience and by picking the right trail experience that is right for them.	Continue the range of pre visit information to ensure people are getting the very best, safe and issues free experience and by picking the right trail experience that is right for them.
A range of quality support services and facilities including information and way marking	The on-site mountain bike trail information is excellent with a safety focus including marker poles as you ride that are marked with numbers representing the distance from the trail start. The mountain bike trail head and waymarking is world class and clearly reflects the level of difficulty riders will encounter on the trail enabling riders to best suit the trail to their abilities. The established and maintained walking trails are well signposted at the trail head and reflect the classification of trail to be experienced.	The level of MTB trail signage is to a high standard, some comments from the MTB survey indicated some improved ride distance and times and continued improvement. Future priority walking trails will need to include quality trail head and waymarking linked to the trail classification.
Trail, food, beverage and retail products and businesses	St Helens has a range of food, beverage and retail products together with bike service and supply shops and shuttle services to transport rider to and from the trails. The attraction of the Valley with new walking experiences and Fingal to climbers at Bare Rock could see the Valley attract and keep new visitors contributing to new hospitality attractions and camping facilities in the Valley.	The MTB survey identified some improvements required to food and beverage available at the St Helens trail head. As new experiences develop trail guiding servicing and drop off pick up to base camp operations will provide additional access and experiences for visitors.

APPENDIX D. PROPOSED AND EXISTING TRAILS HIERARCHY

Table 8. PROPOSED SIGNATURE TRAILS

PROPOSED AND EXISTING SIGNATURE TRAILS/EXPERIENCES	OUTCOME	PRIORITY PROGRAM	LAND MANAGER/OPERATORS	TIME FRAME	ROLES
Georges Bay Trail (existing and proposed) A shared use trail continues from the popular St Helens Foreshore Trail to Akaroa and to links up with a connecting trail to Binalong Bay and the Grants Point to Moulting Bay Walking Trail. A mapped adventure kayaking trail guide is developed for the Bay.	Local people and visitors will experience safe and comfortable cycling and walking on sustainable purpose-built trails and kayakers explore sea kayaking via trail guides and maps.	High	BODC, PWS	Long	BODC
Bay of Fires Lodge Walk (existing) This exceptional lodge, multi day walk and kayaking experiences traverses the rugged coast of Mt William National Park and Ansons Bay. The Bay of Fires Lodge Walk continues to work cooperatively with the wukalina walk operators.	The Bay of Fires Lodge Walk continues to be a renowned and sustainable multiday guided walking experience. Clients recognise Break O'Day as a destination and are involved in post Bay of Fires experiences. Minor trail alignment issues on the headlands are resolved*.	Medium	PWS, Tasmanian Walking Company	Medium	PWS /Tasmanian Walking Company
wukalina Walk with the Traditional Owners (existing) Located within Mt William National Park this multi day walk provides a remarkable mix of culture and great landscapes guided by traditional owners.	Interstate, overseas and local visitors experience the wukalina Walk as one of the best Tasmanian guided Aboriginal cultural trail experiences.	Medium	PWS, wukalina walk operators	Medium	PWS /NBT
The Bay of Fires, Blue Tier and St Helens MTB Trails (existing). The St Helens MTB Trails and Bay of Fires Trail 42 km mountain bike adventure trail from the Poimena Trail Head to Swimcart Beach on the Bay of Fires.	The Bay of Fires and St Helens MTB Trails continue to be popular destinations for Australian, international and local riders. The trails compliment and support the Northeast as centre for sport development and expertise. Sustainable resourcing of trails is achieved through an effective governance model.	High	BODC, stakeholders, PWS, Sustainable Timbers Tasmania (STT)	Long	BODC PWS
St Patricks Head Walking Trail (proposed) This long-time favourite half day walk of the Northeast has spectacular 360° views of the Tasman Sea and Ranges. The road access and tough trail and climb to the summit limits this trail to experienced and fit Fingal Valley locals and visitors.	St Patricks Head becomes the iconic walking destination within the Fingal Valley with well-designed, sustainable and safe Class T3 walking trail infrastructure and good road and long term public access.	Medium	BODC, PWS, STT and land owners	Medium	PWS

PROPOSED AND EXISTING SIGNATURE TRAILS/EXPERIENCES	OUTCOME	PRIORITY PROGRAM	LAND MANAGER/OPERATORS	TIME FRAME	ROLES
St Columba Falls (existing) is one of Tasmania's highest single drop waterfalls at more than 90m and within 30 minutes' drive from St Helens. The most popular waterfall experiences in the Northeast Tasmania with some 40,000 visitors annually.	The St Columba Falls continue to attract as part of a range of accessible and well promoted waterfall and Great Short Walks sites in Northeast Tasmania	Low	BODC, PWS	Long	PWS

Table 9. PROPOSED SUPPORTING TRAIL EXPERIENCES

PROPOSED AND EXISTING SUPPORTING TRAILS/EXPERIENCES	OUTCOME	PRIORITY	LAND MANAGER AND OPERATORS	TIME FRAMES	RESPONSIBILITY
Swimcart Beach to Binalong to St Helens (proposed) An off-road shared trail is proposed to connect these coastal areas with the Grants Point Trail, the proposed Georges Bay Trail (see 1.1.10 above), the proposed Moulting Bay Cultural Trail (see below) and the Bay of Fires MTB Trail and St Helens. This supporting trail is to be assessed as part of the Bay of Fires Master Planning process to investigate the feasibility and sustainability of this proposed trail.	The Swimcart to Binalong Trail environmental and social concerns has been thoroughly assessed through the Bay of Fires Master Planning process. Decisions are made on sustainable, and community supported future trail options. Safe and enjoyable walking and cycling is provided for locals and visitors between Swimcart Binalong and St Helens.	High	BODC, PWS,	Medium	PWS BODC
Moulting Bay Cultural Trail (proposed). Tasmanian Aboriginal Traditional Owners are seeking trails that connect to land, coast and their living places (including midden sites). A low impact boardwalk foreshore and coastal forest trail has been considered at Moulting Bay or Clerk Point connected to the existing sandy track. This Class 1 trail will provide access for people with a range of abilities with older traditional owners able to connect again with the estuary shoreline and the cultural living places. Cultural heritage and environmental assessments and consultation will be required.	Tasmanian Aboriginal people experience their culture and living places via low impact boardwalk structures with minimal impact on the cultural living places that make this site attractive to traditional owners. Locals and visitors enjoy this step into Tasmanian Aboriginal culture and through appropriate interpretation appreciate the rich diversity of the landscape.	High	BODC, PWS, STT and the Tasmanian Aboriginal community	Short	Traditional Owners BODC PWS
Blue Tier Forest Reserve Walking Trails (existing) Easy, moderate and hard walking trails are located within the high country of Poimena. The trails provide glimpses of the harsh mining history within the cold alpine setting. The wet nature of the site requires good sustainable trail construction and maintenance.	Walking Trails within Poimena continue grow in popularity and compliment the Bay of Fires and Blue Tier Mountain Bike Trails making this site a well-managed and popular trail destination. Road access is maintained to a standard suitable to the increased visitor interest within this area.	High	BODC, PWS, STT and community	Long	PWS

PROPOSED AND EXISTING SUPPORTING TRAILS/EXPERIENCES	OUTCOME	PRIORITY	LAND MANAGER AND OPERATORS	TIME FRAMES	RESPONSIBILITY
The Leeabarra, Douglas Apsley Multi Day Walk (existing). This once popular 2.5 - 3-day (28 km) Grade 4 bushwalking experience follows the Leeaberra Track. The trail is suited to walkers with reasonable levels of fitness and bushwalking experience. currently trail head, waymarking and information is limited and the road access to the trail head is not maintained.	The multiday walk has suitable trail head and waymarking signs and appropriate vehicle access to the trail head is provided. This multiday trail is promoted and available to independent and guided walks as one of three popular multi day walks in the Break O' Day region.	Medium	BODC, PWS, STT and community	Short	PWS
The Break O'Day Tasmania's 60 Great Short Walks (existing) and waterfall trails. There are five great short walks within Break O' Day region; Apsley River Waterhole and Gorge, Evercreech 'White Knights' walk and waterfall, Goblin Forest Walk in the Blue Tier Forest Reserve, Ralph Falls and St Columba Falls. These short walks are the backbone to visitor trail experiences within Break O' Day. In addition Break O'Day has a number of waterfall trails with varying access those accessible and valued by local and visitors include Mathinna Falls and Gray Mare Tail and are clearly support the Break O'Day trail experience.	The five Great Short Walks contribute to the mix and range of trails and continue to attract locals and visitors. The facilities and services. The infrastructure is fit for purpose, well maintained and the attractions are accessible for users. The short walks collectively are part of Break O' Day trail attraction that are recognised and promoted and increase visitor numbers or result in increased length of time spent in the region.	Medium	BODC, PWS, STT and community	Long	PWS

PROPOSED AND EXISTING LOCAL TRAILS/EXPERIENCES	OUTCOME	PRIORITY	LAND MANAGER OPERATORS	TIME	ROLES
St Marys to Cornwall Rail Trail - The Fingal Valley disused railway has long been sought as a future rail trail for cycling, running walking and as a link between towns. The full 20-kilometre trail would require significant investment and engagement with lease owners and neighbours who farm along the alignment. A rail trail would provide local people and visitors of all abilities with a flat hardened trail surface suitable for a range of users including children in pushers. The trail would have great views of the surrounding ranges and rural Tasmanian scenery and there would be opportunity for Ebike hire. Initial limited recommendation is for a 5 km section to the mining heritage town of Cornwall.	St Marys and Fingal Valley community and visitors enjoy the benefits of access on a short 5 km shared rail trail experience to Cornwall. The trail provides visitors with interpretive experiences of the coal mining rail heritage loading site with opportunities for guided tours and shuttle bus access to the historic Cornwall Town.	High	BOD, STT, Cornwall St Marys community, land owners and mining local tour operators	Medium	BODC
Kings Park St Helens – the small reserve situated at the entrance to St Helens has links to the foreshore trail and the town. Past management has included ecological restoration and protection of the threatened grassy <i>Eucalyptus globulus</i> (Blue Gum) forest. The site is also recognised by Tasmanian Aboriginal people for its cultural significance. Being on the doorstep to St Helens the site has a range of values and requires an agreed management plan to direct its future potential for conservation, Aboriginal culture and as a place for passive recreation including trails.	Kings Park has a forward-looking management plan that incorporates protection of the important ecosystems, the cultural sites and provides enjoyment for locals, visitors and traditional owners through trail access for local people and visitors, connection with culture, nature and interpretation.	Medium	BODC	Medium	BODC
Winifred Curtis Reserve coastal walks - south of Scamander this reserve provides a network of trails for visitors and valued by the local community.	Scamander continues to have walks amongst nature and native plants which contributes to community wellbeing. Break O'Day and the community maintain this	Medium	BODC	Medium	BODC

PROPOSED AND EXISTING LOCAL TRAILS/EXPERIENCES	OUTCOME	PRIORITY	LAND MANAGER OPERATORS	TIME	ROLES
	small reserve for passive recreation and contributing to local pride and activity.				
The Fingal Valley Explorer Trail is set within Fingal Town and connects points of history and interest including cemeteries, churches, schools, historic buildings and pubs. This trail would utilise footpaths and road reserves providing an easy trail experience for visitors and locals and contributes to fitness and wellbeing by having a defined trail on relatively flat land throughout Fingal Town.	Fingal Town has a well-marked trail around the town that provides locals and visitors with a short walking tour. Locals enjoy the opportunity to walk the town and enjoy benefits gained from exercise and connection with people and place. Visitors enjoy the features of the town and contribute to town pride.	Medium	BODC	Medium	BODC
Additional waterfall and other trail experiences – Break O’Day has several remote trails and opportunities to experience nature. By the very nature, mix of landowner and access challenges these waterfalls and other sites are not always accessible by conventional vehicles, are not generally sign posted, promoted or do not appear on maps. These locations can provide special experiences for visitors and locals and would require local knowledge and at time approval for access or guided access. It is unlikely that access to these sites will be improved in the short term however there is opportunity for locally based guiding and advice where suitably experienced and equipped visitors can visit these sites as part of a Break O’Day trails experience.	Locals and visitors experience more remote adventure and heritage trails and waterfall experiences though guided access or independently via local advice and assistance. Fingal Valley becomes a centre for locally guided trail experiences.	Medium	BODC PWS, STT,	Medium	PWS

PROPOSED TRAILS FURTHER ANALYSIS	ASSESSMENT	RECOMMENDATION
<p>St Marys to Fingal Rail Trail - St Marys to Cornwall Rail Trail - The Fingal Valley disused railway has been sought as a future rail trail for cycling, running and walking. The trail would have great views of the surrounding ranges and rural Tasmanian scenery. The full 20 km trail would require significant investment and would require significant engagement with current lease owners and neighbours. There would be significant expense in delivering a trail across this highly productive farmland. Significant bridge reconstruction would be required and linking into Fingal would need to be defined as the rail bed in the town is used for coal transport.</p>	<p>The construction of the rail trail would require an estimated \$6 million to construct including replacement of bridges and ballast removed from the rail embankment. Local farmers have clearly expressed a lack of support for the change in land use from farming and access across the rail line to a rail trail. Further analysis will be required to gauge the experience and the level of anticipated use by visitors and locals.</p> <p>The shorter 5 km section between St Marys and Cornwall provides opportunity for locals and visitors to do a return trip without the need of shuttles and fits with the local desire for suitable trails out of the town.</p> <p>The short section also provides the opportunity to present to farmers what are the real issues for their future production with a change in land use from agriculture to recreational use.</p>	<p>That the 5km trail from St Marys to Cornwall be further investigated through consultation with adjacent land owners and more detailed concept planning including costing be undertaken. A feasibility proposal should be developed for the shorter section St Marys to Cornwall.</p>
<p>Tasmania's East Coast Trail - A trail has been proposed on 237 km of coast, taking in the iconic natural attractions from the Bay of Fires to Freycinet. The proposed trail corridor would provide unique experiences linked to the attractive coastline and small coastal towns with a range of accommodation available for walkers and cyclists.</p> <p>Ownership of the trail would rest with the existing landowner, generally Parks and Wildlife Service and local Councils. The management structure of a future trail would need to be decided.</p> <p>The broad cost of the Trail development has been estimated at \$20,220,000 with \$1,270,000 for detailed design and approvals. Ongoing costs of the Trail have been estimated at between \$358,000 and \$433,000 per year Benefit Cost Ratio: 2.62⁵⁹</p> <p>The trail design also incorporates optional routes including a connection to St Marys and the Douglas Apsley National Park.</p> <p>Matters of National Environmental Significance (MNES) are prominent within the trail study area, and there are nationally significant foraging and nesting areas for migratory and sedentary shorebirds and seabirds, as well as occurrences of nationally threatened mammals, frogs and land birds, as</p>	<p>Tasmanian Parks and Wildlife Service have recently undertaken a comprehensive assessment in Tasmania's Next Iconic Walk Feasibility Study. The result provided recommendation for a multi-day walking experience within the Tyndall Range on Tasmania's West Coast.</p> <p>As a major landowner on the proposed Tasmania's East Coast Trail future support from Tasmanian Parks and Wildlife Service would be required.</p> <p>The environmental and cultural considerations identified within the East Coast Trail require significant and detailed and further assessment to establish a suitable alignment that would be attractive to the trail market and have minimal impact.</p> <p>There is merit in further assessment of the opportunity and the 2015 study indicated Capital Cost Estimate: The broad cost of the Trail development has been estimated at \$20,220,000 with a further \$1,270,000 for detailed design and approvals.</p>	<p>Undertake further targeted assessment of experience and opportunity including community consultation towards an agreed concept prior to moving on to a detailed design and approval stage.</p>

⁵⁹ planning for sustainable tourism on tasmania's east coast | hansen partnership Pty Ltd | august 2014

PROPOSED TRAILS FURTHER ANALYSIS	ASSESSMENT	RECOMMENDATION
<p>well as internationally significant wetlands (Ramsar sites). The coastal dune vegetation is often all that remains of the former native vegetation that covered much of the study area.</p> <p>There are significant Aboriginal archaeological sites and values creating constraints and opportunities for protection and interpretation of Aboriginal living places (midden deposits) which occur continuously along the entire coast.⁶⁰</p>	<p>There was not the scope in the development of this Break O'Day strategy to provide a detailed assessment of the previous planning. Further assessment of the experience and opportunity provided by this trail together with significant community consultation would be required prior to concept development and any movement to the design and approval stage</p>	
<p>Scamander River Trail is located alongside the Scamander River and is a natural feature that defines the township of Scamander. The township itself borders the river very close to where it enters the ocean. The township itself has lies on both sides of the two bridges.</p> <p>A walking, cycling path has been proposed alongside the southern side of the river and close to the wetlands on the coastal plain with connections to the coastal dune and river mouth system. A loop trail using the existing roads and the Winifred Curtis Reserve could provide a return trail experience to Scamander for visitors and locals to enjoy sections of this not often experienced landscape.</p>	<p>The proposed trail would provide additional opportunity within these unique areas for locals and visitors. The development of trails within this coastal area will require assessment due to the sensitivity nature of these coastal areas and should be subject to a thorough environmental and cultural heritage assessment, to determine potential impacts and mitigation measures.</p>	<p>It is recommended that further feasibility assessment be undertaken to assess the potential alignment, the user experience provided, and further determination of the environmental and cultural assessments required.</p>
<p>Aquatic Adventure Trails do not currently feature within Break O'Day for independent visitors. Some operators offer aquatic components (rafting and kayaking) as part of visitor or school-based experiences. Future opportunities could include marked or mapped trails on a range of water types.</p> <p>Break O'Day have a range of waters available for Aquatic Adventure Trails including enclosed Sea – inside of estuaries, harbours and embayment's.⁶¹</p> <p>Paddling a kayak is one of the best ways to explore and enjoy the coastline and its many features of interest. Participants would need to consider their skills and experience and be prepared and mindful that the conditions on the river and embayments can change quickly.</p> <p>Tasmania's Clarence City Council Kayak Trail provides an example of how to approach a future Break O'Day aquatic trail and how users can make the best decision about future experiences.⁶²</p>	<p>Break O'Day has a number of potential sites where locals and visitors can get involved in an exciting range of aquatic adventure activities based on their skills abilities and equipment.</p> <p>Some lakes, embayments and coasts may have sensitive ecosystems or wildlife refuges which would need to be assessed for future aquatic trails. Bays such as Ansons Bay and Georges Bay provide opportunity to develop aquatic trails which could be planned in a similar manner to the Clarence City Council Kayak Trail. Aquatic trails would provide unique new opportunities for local people and visitors to take advantage of the areas unique costal and river environments adding to the diversity of trails.</p>	<p>Explore Aquatic Adventure Trails within Break O'Day and look to develop aquatic trail guides for coastal areas and rivers that are suitable for a range of skills and experience and have no impact on sensitive ecosystems or cultural sites.</p>

⁶⁰ sustainable tourism plan | hansen partnership | february 2015

⁶¹ <https://paddle.org.au/education/safety-guidelines-v2>

⁶² Clarence-City-Council-Kayak-Trail.

APPENDIX E. BREAK O'DAY PRELIMINARY TRAIL AUDIT

Trail data has been collated from www.bodc.tas.gov.au, Tasmanian Parks and Wildlife Service, www.alltrails.com, www.cowirrie.com and preliminary trail audit data collated by the Break O'Day Council.

Table 10. Signature Trails

TRAIL NAME	LENGTH	LOCATION	DESCRIPTION	USER TYPE	LEVEL OF DIFFICULTY	MANAGEMENT RESPONSIBILITY
Bay of Fires and Mt William						
Bay of Fires Lodge Walk	33 km (one way)	Bay of Fires Conservation Reserve	Stretching from Eddystone Point to Binalong Bay along what has been described by Lonely Planet as the world's best coastline. Part of the Great Walks of Australia program, offered by the Tas Walking Company as a 4 day, 3 night guided experience.	Walk and kayak – can only be done through a guided/supported experience	Moderate	Tasmanian Walking Company
St Helens Mountain Bike Trails	Various – up to 42 km (9 trails in total)	St Helens	The St Helens Mountain Bike Trails are some of the most scenic trails in the world – where else in the world can you ride Mountains to the Sea, ending your ride in one of the most beautiful beaches in the world, the Bay of Fires (42 Km from Blue Tier to Bay of Fires). There are 8 stacked loops close to the township of St Helens.	MTB	Green, blue and black diamond trails	BODC
Blue Derby Area						
Blue Derby MTB Trails	125 km of trails 3 trails managed by BODC	St Helens/ Weldborough	The Break O'Day Council is joint owner of the Blue Derby Trails and undertakes management of three trails - the Blue Derby Descent, Big Chook and Little Chook Trails. Traverses through Alpine Plateaus, ancient rainforests and forest giants in the historic mining town of Derby.	MTB Walk	Various trails from green to black diamond	BODC and Dorset Council
St Columba Falls	1.2 km return	St Columba Falls State Reserve	At more than 90m, St Columba Falls are one of Tasmania's highest. The walk to the base of the falls is definitely another highlight. It takes you through cool and shady rainforest that has some of the tallest tree ferns you'll see anywhere.	St Columba Falls	W2 (Class 2)	PWS

Table 11. Supporting Trails

TRAIL NAME	LENGTH	LOCATION	DESCRIPTION	USER TYPE	LEVEL OF DIFFICULTY	MANAGEMENT RESPONSIBILITY
Fingal Valley						
White Knights Walk and Evercreech Falls	1 km circuit	Evercreech Forest Reserve	These giants of the Eucalyptus viminalis species are the tallest of their type in Australia and reach over 90m in height. For a longer walk, connects through to Evercreech Falls (2.4 km return). Carpark, picnic area and BBQs, toilets, access friendly to lookout	Walk	T1 (Class 1)	PWS
Grey Mares Tail	5-10 min walk	St Marys Pass State Reserve	A tall but typically low-flowing waterfall near St Marys	Walk	W2	PWS
Mathinna Falls	0.8 km return	Mathinna Falls Forest Reserve	A series of four excellent waterfalls totalling over 100 metres in height, with different difficulties to get to. The upper tiers of Mathinna Falls are not on the main trail, nor are they easily accessed.	Walk	T1 (Class 3)	PWS
Blue Tier Area						
Ralphs Falls	1.5 Km return to falls only 4 or 2.5 km circuit via the Cashes Gorge Track	Mt Victoria Forest Reserve	Mossy rainforest leads to one of Tasmania's highest waterfalls. Ralphs Falls drop dramatically nearly 100m off the escarpment in a single curving ribbon.	Walk	W2 (Class 2) – Falls T1 (Class 3) – Cashes Gorge Track	PWS
Blue Tier Giant Tree Loop	3.5 km Circuit	Blue Tier Forest Reserve	This walk houses a landmark - appropriately deemed the "Big Tree", it's the widest living tree in Australia at 60 metres high and 19.4 metres wide.	Walk	T1 (Class 3)	PWS
Goblin Forest Walk	400m return	Blue Tier Forest Reserve	Short walk through beautiful rainforests. Wheelchair friendly. Carpark, picnic facilities, toilets and BBQs.	Walk	T1 (Class 3)	PWS

TRAIL NAME	LENGTH	LOCATION	DESCRIPTION	USER TYPE	LEVEL OF DIFFICULTY	MANAGEMENT RESPONSIBILITY
Moon Valley Rim Loop Walk	2.5 km Circuit	Blue Tier Forest Reserve	The walk takes you to the summit of Mt. Poimena then along Moon Valley Rim and Blue Tier Battery before returning via the Sun Flats Road.	Walk	T2 (Class 3)	PWS
Wellington Creek and Australia Hill	4.5 km Circuit	Blue Tier Forest Reserve	Passes through open country and stands of regenerating rainforest and is great for visitors who want to see some remnants of the mining era.	Walk	T2 (Class 4)	PWS
Mt Michael Loop Track	2.5 km Circuit	Blue Tier Forest Reserve	Begins at the Sun Flats Road. The walk passes through rainforest before climbing up to the summit of Mt. Michael. Walkers are rewarded with fantastic views. On the way down stop and look at the Mt. Michael Mine which was one of the largest mines in the area.	Walk	T2 (Class 4)	PWS
Three Notch Track	10km One way	Blue Tier Forest Reserve	Follows an old pack trail to McGoughs Lookout and return. Walkers are rewarded with spectacular views of the coastline. The walk is long and difficult and should only be attempted by experienced walkers.	Walk	Route (Class 6)	PWS
Halls Falls Track	3.6 km return	Blue Tier Forest Reserve	Small but pretty falls near Pyengana.	Walk	T1 (Class 3)	PWS
Anchor Stamper	2 km	Blue Tier Conservation Reserve	Old Anchor Tin Mine. Near Halls Falls	Walk	T1 (Class 3)	PWS
St Helens and South Coast						
St Helen's shared use pedestrian pathway	4 km one way	St Helens	Shared use pedestrian cycle way follows Georges Bay foreshore from the turn off to St Helens Point and can be followed all the way around to the main township passing playgrounds and the popular Beauty Bay on the way.	St Helen's shared use pedestrian pathway	Easy 4 km one way	BODC
Aspley River Waterhole	1.2 km return	Douglas Aspley National Park	Gentle stroll through open woodland before reaching the surprising and lovely Aspley Waterhole.	Walk	W2 (Class 2)	PWS
Leeabarra Track	23 km one way	Douglas Aspley National Park	Spectacular multi-day walk through the deep gorges, dry sclerophyll forests, and rainforest areas. Passes through Heritage Falls and Tevelein Falls.	Walk	T3 (Class 5)	PWS

TRAIL NAME	LENGTH	LOCATION	DESCRIPTION	USER TYPE	LEVEL OF DIFFICULTY	MANAGEMENT RESPONSIBILITY
Bay of Fires and Mt William						
The Gardens Lookout	400m return	Bay of Fires Conservation Reserve/Binalong Bay	Views over the Bay of Fires		W1 (Class 1)	PWS
Policemans Point to the Gardens	13 km one way	Bay of Fires Conservation Reserve	Campsites enroute if seeking a shorter overnight hike in the Bay of Fires	Walk	Route (Class 6)	PWS
Mt William Summit Track	3.5 km Return	Mt William National Park	Mt William summit is an easy 90-minute return walk, with extensive views of the landscape, coast and distant Bass Strait islands.	Mt William Summit Track	T2 (Class3)	PWS
Cobbler Rocks from Stumpy's Bay Campground	6km Return	Mt William National Park	Nice easy circuit that starts near campground. Along the beach is nice with spectacular ocean views from the northeast coast.	Walk	T1 (Class 3)	PWS
Skeleton Bay Walks	150 m to 9 km return (4 walks)	Humbug Point Nature Recreation Area	4 walks leaving from Skeleton Bay – rocky coastal area. Dora Point – 9 km return Skeleton Cove beach access – 150 m return Grants Point – 5 km return Skeleton Rock – 2.8 km return	Walk	All tracks - T1 (Class 3)	PWS

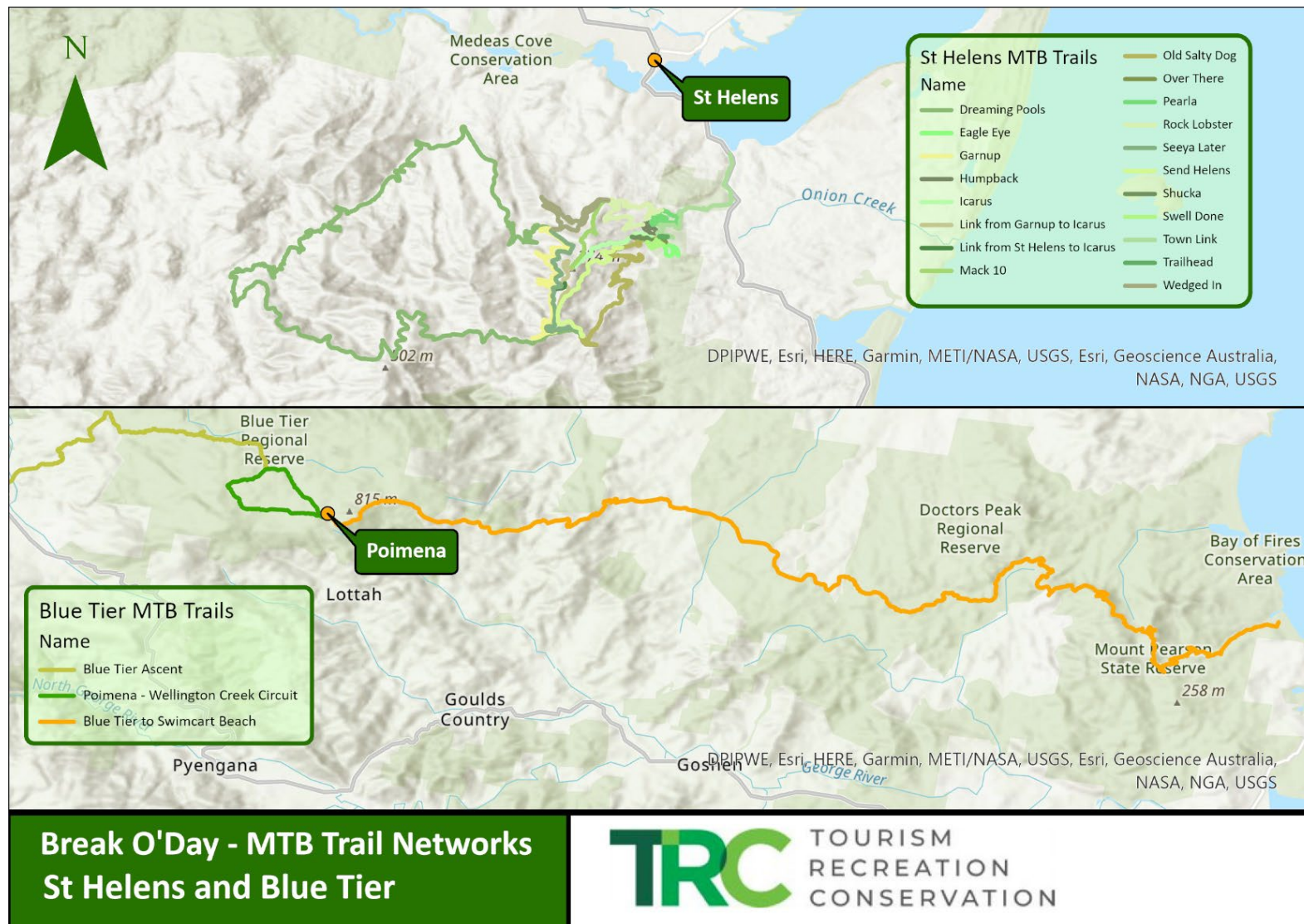
Table 12. Local Trails

TRAIL NAME	LENGTH	LOCATION	DESCRIPTION	USER TYPE	LEVEL OF DIFFICULTY	MANAGEMENT RESPONSIBILITY
Fingal						
Meadstone Falls	3.5 km return	Mt Puzzler Forest Reserve near Fingal	A large waterfall flowing along St Pauls River. Meadstone Falls drops into a natural pool surrounded with large rocky cliffs on each side. Upstream from the waterfall are other natural pools ideal for swimming, which can be easily accessed from the track.	Walk	T2 (Class 4)	PWS
Coalminer's Heritage Wall and Heritage Walk	250 m	Cornwall	Town walk with interpretation of coal mining history	Walk	Easy	BODC
Mt Young	1.4km Circuit	Mathinna	Short trail with elevation 109m.	Walk	Route (Class 6)	PWS
Huntsmans Cap	1.6 km return	Huntsmans Cap Regional Reserve Near St Marys	Summit walk elevation 168m. A challenging track.	Walk	Route (Class 6)	PWS
Mt Saddleback	2.5 km return	South Esk Forest Reserve		Mt Saddleback	T3 (Class 5)	PWS
South Sister Lookout	1.4 km return	Near St Marys	A lookout that give 360 degree views north to St Helens and the Bay of Fires, west to Ben Lomond National Park and south to Bicheno and Freycinet National Park.	4WD access	T1 (Class 3)	PWS
St Marys						
St Patricks Head	5 km return	St Patricks Head State Reserve	Challenging walk and will take around 3hours return as it climbs steeply to 683m above sea level, but once at the top, the 360-degree views across the Fingal Valley and north and south up the east coast	Walk	T3 (Class 2)	PWS
Blue Tier Area						
Weldborough Pass Rainforest Loop	0.2 km	Weldborough Pass State Reserve	Short walk through Tasmania's cool temperate rainforests.	Walk	T1 (Class 3)	PWS
Mt Victoria	5 km return	Mt Victoria Regional Reserve near Pyengana	Rainforest walk	Walk	T3 (Class 4)	5 km return

TRAIL NAME	LENGTH	LOCATION	DESCRIPTION	USER TYPE	LEVEL OF DIFFICULTY	MANAGEMENT RESPONSIBILITY
Mt Albert	2.3 km return	Mt Victoria Forest Reserve	Short and steep walk through rainforest.	Walk	T4 (Class 5)	STT
Winifred Curtis Reserve Walks	1 km – 8 km walks	Scamander	A range of walking trails along the coast and to Falmouth within the Reserve.	Walk	Easy	PWS
Burns Bay to Beerbarrel Beach	1.5 km One way	St Helens		Walk	T1	PWS
St Helens Point Navigation lookout	10 minutes	St Helens	Through coastal vegetation to point	Walk	T1 (Class 3)	PWS
St Helens Training Wall to Blanche Point	1.8 km return	St Helens	Blanche Point abuts a man-made stone wall along the Georges Bay channel.	Walk	Easy	PWS
Ferntree Falls	0.2 km return	St Helens	The Launceston Creek near St. Helens is home to Ferntree Falls, a waterfall with a height between 5 to 10 metres. The waterfall comes to life after good rainfall, flowing down multiple tiers.	Walk	Easy	PWS
Breakaways Binalong Bay Loop	13.7 km loop	Binalong Bay	Loop walk through forest and coastal areas.	Walk	T1 (Class 3)	PWS
Echo Falls	6.8 km return	St Helens	No designated track.	Walk	Grade 4	PWS
Evercreech Rivulet Falls	5 km return	Evercreech Forest Reserve	No track. Continuation from the Evercreech Falls Walk.	Walk	Difficult	PWS
Peron Dunes to Maurouard Beach	3 km return	St Helens Conservation Area	Potential to link up to St Helens Point as a loop day walk	Walk	Easy	PWS
Blanche Point Beach Walk	2 km return	St Helens Conservation Area	Along beach sometimes affected by tide	Walk	T1	PWS
Dianas Basin	3 km	St Helens Point State Reserve	Walking along beach. Campground at Dianas Basin.	Walk	Easy	PWS
Bay of Fires and Mt William						
Humbug Point Loop	10 km loop	Near Binalong Bay	Starts near the Moulting Bay Campground. Pleasant sandy track from the bush to the beach and return.	Walk	T2 (Class 3) – part of track T1 (Class 3)	PWS
Cosy Corner	3.1 km return	Bay of Fire Conservation Reserve	Located at the Cosy Corner Campground in the southern entrance to the Bay of Fires Conservation Reserve. A short beach walk from the campground area.	Walk	T1 (Class 3)	PWS

TRAIL NAME	LENGTH	LOCATION	DESCRIPTION	USER TYPE	LEVEL OF DIFFICULTY	MANAGEMENT RESPONSIBILITY
Moulting Bay Loop Walk	9 km loop	Humbug Point Nature Recreation Area	Walk through coastal bushland	Walk	T2 (Class 3)	PWS
Sloop Point Walk	Short	Bay of Fires Conservation Area	Short walk from Gardens Rd/Taylors Beach	Walk	T2 (Class3)	PWS
Mt Pearson	6 km to summit	Mt Pearson State Reserve	Walking track from Gardens Road to Mt Pearson Summit		T4 (Class 5)	PWS
Skyline Tier Lookout	unknown	Beaumaris	Short steep 4WD track.	Walk	Difficult	STT / FPPF
Ironbark Falls	0.5 km return	St Helens	A short drive from St. Helens in Tasmania's north-east coast, Ironbark Falls is a small waterfall situated on Constable Creek. Several other small waterfalls are in the area. No designated tracks, requires GPS. Very experienced hikers only.	Walk	Difficult (Grade 5)	STT/FPPF

APPENDIX F. BREAK O'DAY EXISTING MTB NETWORK



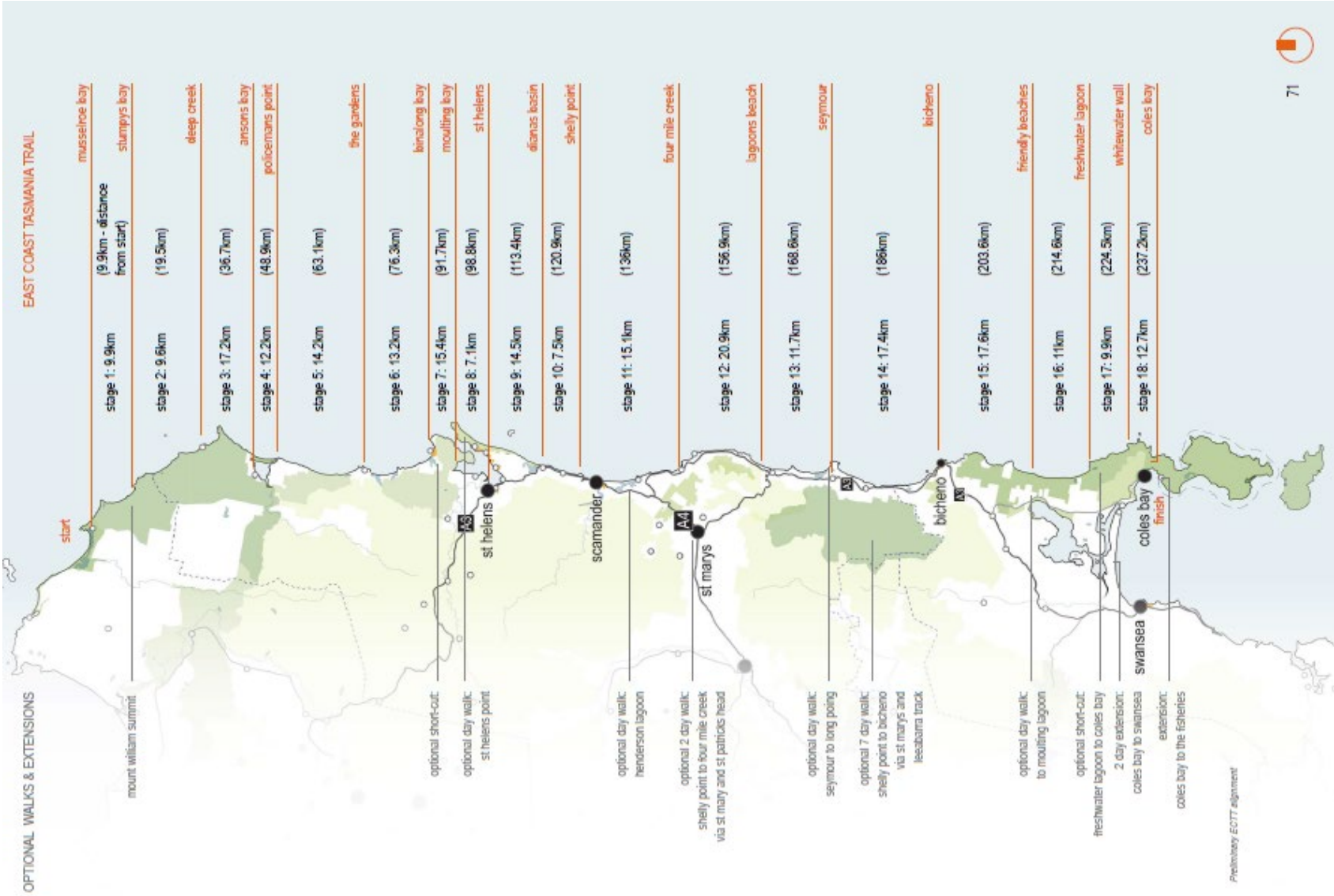
APPENDIX G. TASMANIAN TARGET MARKETS

Table 13. Detailed descriptions of the Tourism Tasmania expanded market segmentation⁶³

MARKETS	RAW URBANITES – NURTURING SENSITIVE, HONEST AND REAL.	ERUDITES – KNOWLEDGEABLE AND CULTURED, CLEAR AND COMPOSED.
Holiday habits	More likely to take a longer holiday, and as a result spend more. Seeking down days as well as fun things to do, completely turn off, happy to be (mostly) disconnected. Anxiety high in planning stages of journey.	Pre-planners, squeezing in as much activity as they can. High yielding and become destination advocates. More inclined to share their travels on social media. Fear of missing out so seek information before and during holiday.
Predisposition to travel	More likely to ‘go off the beaten track’. They often have too much annual leave or suffering work stress so may be prompted to take holidays by their workplace. Longer period between returning and starting to dream for the next holiday.	Less inclined to disperse; they are ‘pulled’ to destinations by product innovations and events, and will actively engage with the destination when there. Very little gap between returning and starting to dream about the next holiday. Trigger to Travel is the pull of exploring and destination.
Age*	Spread across spectrum, however skew older 50+ age group	Spread across the spectrum, no skews.
Location	More likely NSW and Vic than other states. Predominantly metro, through RU are more likely than Erudites to live outside Sydney and Melbourne.	More heavily metro-based than RU, and more likely to be in Sydney or Melbourne.
Life stage *	Any life stage, but skew to empty nesters (30% and slightly skew to older families.	Any life stage, slightly over indexing as empty nesters or single.
Spending habits	Earn marginally less than Erudites, but they are willing to spend a longer time on holidays, to relax and reconnect with their loved ones.	Not afraid to ‘Splash out’ and like a little luxury in their travel.
What they seek and why they travel	Interactions that are engaged, honest, pure and real, without cynicism or hidden agenda. Their communal nature seeks an outward connection with others, as well as the natural environment. The counter structure to the hectic, busy daily lives they lead is serious inner peace and finding themselves through being away from materialism, and unnecessary technology. Seek opportunities to switch off, refresh and rejuvenate through nature and rebuild connections. They need ‘mindful moments’ in holidays which allow them to be present, in order to return to everyday life refreshed.	Holidays for Erudites are about switching on rather than switching off. Unique experiences with rich culture, deep heritage, innovation and intrigue. Their self-contained nature seeks enrichment through reflection, discovery, contemplation and self-expression. The acquisition of Knowledge and need to be a cultural pioneer is central to their travel motivations, and expressing themselves in paramount.
Experiences they value	Seek moments of peace, connection, inspiration and captivation. Types of experiences they value (in order of importance) are: 1. Natural experiences 2. Australian product 3. Return to basics 4. Local immersion	Seek stimulation and enrichment. Types of experiences they value (in order of importance) are: Cultural immersion Gourmet dining Natural experiences Australian product

⁶³ Reimagining Our Regions’, Tourism Tasmania 2020

APPENDIX H. EAST COAST TASMANIA TRAIL PROPOSAL



APPENDIX I. ROTORUA MOUNTAIN BIKING - MANAGEMENT AND GOVERNANCE⁶⁴

There are four main areas for Mountain Biking:

1. Moerangi Mountain Biking Trail, cross country, 1hr 40mins from Rotorua – 35kms of trail
2. Rainbow Mountain MTB Trail, cross country/technical downhill, 30mins from Rotorua - 10kms of trail
3. Skyline Gravity Mountain Biking Park, gondola/downhill, 10mins from Rotorua – 10.5kms of trail
4. Mountain Biking in The Redwoods (Whakarewarewa Forest), cross country/downhill, 5 mins from Rotorua – 160+kms of trail

Cost to Ride

There is no charge to ride in the Redwood Forest, Moerangi or Rainbow Mountain. All these areas are administered by the Department of Conservation (D.O.C.) and are open to ride at no charge.

Skyline MTB Gravity Park is a privately owned commercial venture - 12 trails within a 12km trail network operating a gondola.

Passes are:

	ADULT (NZ\$)	YOUTH (NZ\$)
1 Uplift	\$32	
15 Uplift	\$61	\$46
40 Uplift	\$115	
65 Uplift	\$165	
100 Uplift	\$225	
MTB Season Pass	\$799	\$549

The Redwoods (Whakarewarewa Forest) Maintenance

The Rotorua Trails Trust continues the achievements of the Rotorua Mountain Bike Club who has, over several years, developed and maintained the network of quality mountain bike trails within the Whakarewarewa forest. The Trust has now taken on this role and the challenge of extending the trails and further improving the network.

The Rotorua Trails Trust builds, rebuild, maintain and advocate for MTB, walking and equestrian trail network in the Whakarewarewa Forest as well as the Rainbow Mountain trails, Te Ara Ahi network and Western Okataina trail. It is also

⁶⁴ www.newzealand.com/au/feature/mountain-biking-in-rotorua/
www.skyline.co.nz/en/rotorua/things-to-do/rotorua-mountain-biking/
www.redwoods.co.nz/bike/track-maintenance/
www.whaka100.co.nz/news/rotorua-trails-trust
www.rotorualakescouncil.nz/our-council/news/Pages/default.aspx?newsItem=7984

involved with the Urban cycleway project. The Whaka network alone runs into over 200km of trail to maintain and the forest being a working forest there is always rebuild work to undertake after logging.

The Rotorua Trails Trust funded through a combination of contracted work for the council and fundraising activity such as grant applications and membership donations. They rely heavily on volunteers - from the Trustees to the 'on trail' volunteers as well as sponsors.

All trail building requests go through the Forest Recreation Management Group made up of Iwi landowner representation, Rotorua Lakes Council and Timberlands. The Rotorua Trails Trust presents new trail ideas to this group for approval. Decisions are made about how the trail will be funded and whether they will build the trails or contract the work out. Any trail being destroyed by logging can be rebuilt automatically.

Mountain Bike Trail Investment

Proposed forest developments, which are included in Council's 2018-28 Long-term Plan, would see improvements to Long Mile Road, the Redwoods i-site and carparking, and the creation of a new recreation hub at another entry to Whakarewarewa Forest along Tarawera Road (between Okareka Loop Road and Lake Tikitapu).

Council is preparing detailed business cases for both the forest enhancements and development of Rotorua's lakefront as part of applications for funding from the Government's Provincial Growth Fund (PGF). Council has received NZ\$811,000 from the fund to prepare the business cases.

Forest Management/Governance

The Tokorangi and adjoining Whakarewarewa Forest combine to provide a vast recreational area with a vast network of trails for mountain biking, walking, running and horse riding. The Redwoods area, which is part of the Tokorangi Forest, is largely used for walking and running.

Tokorangi Forest and Whakarewarewa Forest are managed under Crown Forest Licence by Rotorua Lakes Council and Kaingaroa Timberlands Limited for the CNI

iwi collective who are the land owners – their interests are looked after by CNI Iwi Holdings Limited.

The Crown Forest Licence and the Deed of Settlement provides for general public access to the forests by foot, bike or horse. All other recreational access, both commercial and non-commercial, is subject to the discretion and joint agreement of Rotorua Lakes Council, Kaingaroa Timberlands and CNI and is managed under the Recreational Use of the Tokorangi and Whakarewarewa Forests Interim Policy.

Council is the recreational manager under this Policy and has an obligation to manage the environment of the Tokorangi Forest under the Conservation covenants within the Tokorangi Crown Forest Licence.

Council is entering into a co-governance model with CNI Iwi Holdings, Ngati Whakaue and Tuhourangi. An overall recreational use plan being prepared for the forests will ensure ongoing public access for all user groups and may open up opportunities for recreational tourism developments.

Last year the council won the judges' choice award at the Local Government New Zealand Excellence Awards, for the district's mountain bike strategy. The project was about establishing Rotorua as a globally recognised mountain bike destination through its trails, infrastructure and events.

Council Event Assistance

Crankworx Rotorua is run in conjunction with its Canadian owners Crankworx Events Incorporated, the local festival organiser and not-for-profit company Mountain Bike Events Ltd. This event is conducted mainly at Skyline.

Council agreed to provide an underwrite for Crankworx of up to NZ\$500,000 between 2015 and 2021, on the basis of the anticipated economic benefits for Rotorua. The underwrite called upon for 2015 was NZ\$94,000 and in 2016 it was NZ\$39,000 with no underwrite required for 2017.

APPENDIX J. COMMUNITY SURVEYS

Survey Findings

The survey questions focused on existing use, what would encourage future use, what ideas are there for improvement and what barriers to use are experienced. The survey also gathered information on interested community and user profiles.

A survey was designed and promoted directly to the Break O' Day community and visitors between 11th October 2021 and 7th November 2021.

The survey attracted **158 responses**.

SUMMARY OF RESULTS:

Trail activities that survey respondents are involved in around the Break O' Day area include **Bushwalking short and day walks (80.89%)** followed by **Local walking for exercise and enjoyment (75.80%)** and Enjoying nature (69.43%) respectively. The most common answer why respondents like getting out on the trails was **Nature and the environment (92.86%)**, followed closely **with Exercise (89.61%)** and Wellbeing (74.68%). The top key words when asking respondents which trails, they use were **walking trails** mentioned **43 times**, St Helens (31 times), Blue Tier (21 times), St Mary (20 times) and MTB trails (19 times). When asked why they like or use these trails the top key words were **Nature (14.05%)**, **beautiful (13.22%)**, **exercise (12.40%)** and trails (10.74%). When asked what would make it easier for respondents to get involved in more trail activities, half of the survey respondents selected both **Need trails closer to home (50.36%)** and **Need more trails that suit my abilities or interests (49.64%)** options. Common themes that emerged from the Other (please specify) section was **better maintenance, access, signage** and **an increase of walking trails**. Respondents said they would like to see more **Short walks (74.29%)** and **Longer day walks (65%)**. Thoughts that emerged from the Other (please specify) section included **a preference for walking trails** over mountain bike trails and

dog friendly, accessible trails. When asked are there any specific new or upgraded trails respondents would like to see in Break O' Day **St Helens, St Marys Fingal, St Helens Binalong, Binalong Bay, Scamander** were common answers. Many survey respondents also said **no, there were already enough trails** in Break O' Day. **Maintenance, St Helens, Parking, and Access** were the main problems or issues with existing trails.

Common themes that arose from the further comments section were:

- ongoing maintenance
- more walking trails
- more multi user trails
- problems with access to trails
- enough mountain bike trails
- investment in the hinterland/valleys (not only the coastal areas and St Helens)
- trails for all abilities and ages
- need an aquatic centre/swimming pool
- walking trails in Fingal Valley
- dogs/leash free trails
- multi day walks
- equal emphasis on ALL trails (not just MTB)
- interest in St Marys Fingal rail trail

DEMOGRAPHICS

The majority of survey respondents were aged between **55-64 years old (33.09%)** followed by 45-54 years old (27.34%). The majority answered they were **Working casual or part time (35.77%)** followed by **retired (28.47)**. The most common postcode for survey respondents was **7215** (67 respondents) and **7216** (46 respondents).

**note: questions were not mandatory in this survey. The percentages do not reflect the total amount of survey respondents, only the total amount of respondents who answered that particular question. A break down is provided below.*

Community Drop In Sessions

Summary of comments from the Community Drop In Sessions conducted at Scamander, St Helens, St Marys and Fingal between 20th and 21st October 2021. The Community Drop In Sessions attracted some 36 participants.

Summary of Comments or Ideas
St Marys Valley seeking a network of multi-use trails that are family accessible
Rail trail between St Marys and Fingal
St Patricks Head upgrade
St Marys Pass along the bottom
St Marys Pass to the Coast
St Patricks Head car park, access and signage upgrade
Rail trail St Marys to Cornwall for multi-use and family walking
Repair bridge access to local waterfalls
Mathinna Waterfall Road Upgrade
Development and improvement of new and existing trails in the Valley
Paddys Head
Rail Trail St Marys to Fingal
Cycling trails that allow for a range of bikes including recumbents and safe and enjoyable touring cycle routes
Trail information captured on websites or trail guide menus or brochures
Walks from Bicheno to St Helens
Rail Trail St Marys to Fingal
Open days for walkers on mountain bike trails
Walking trail St Marys to St Helens

Summary of Comments or Ideas
Pontoons for swimmers in Beauty Bay
Consider sea level rise on coastal walking trails
Long distance walking trails Lands End to John O Groats
Scamander River Walking Cycling Trail on the south side of the river by the bridge
Support for recreational trails and local job opportunities
St Marys Rail Trail
Fingal trails for walking and cycling in the short term and vision for the future of Fingal
St Marys to Fingal Rail Trail with a focus on children
Safety through a St Marys to Fingal Rail Trail
Trails and paths around St Marys connecting the towns and points of interest
Rail Trail from St Marys to Fingal Rail Trail with St Marys to Cornwall as a start for increased community health through walking and cycling
For health and wellbeing continue the multi-use track from Beaumaris to St Helens and for commuting from Scamander for residents
St Marys to Fingal Rail Trails for health and wellbeing of residents
Seeking details of Binalong Foreshore Trail and Swimcart to Binalong Trail
Conservation is uppermost
St Marys to Fingal Rail Trail

APPENDIX K. ECONOMIC IMPACT ASSESSMENT REPORT

Executive Summary

This report provides an economic impact assessment of the Break O Day trails network and a cost benefit analysis of the proposed new trails and improvements to existing trails. The results are indicative of the benefits of the extended trails for walkers and mountain bikers.⁶⁵

Two types of analysis was undertaken: estimates of number of trail users (mountain bikers and walkers) and development of 10 year projections (based on growth in both user markets and the extended/improved trails) and the total benefits to the region; and a Benefit cost analysis: estimation of the growth in trail users over this period to measure benefits compared with the proposed capital spending (\$6.995 million) on new trails and trail improvements.

The analysis of each of the trail user segments allows for a comparative assessment of the economic impacts of trail users on the Break O Day regional economy.

Construction Phase Impacts

Construction costs for the trails development is estimated at \$6.995 million.⁶⁶ This includes new trail segments and upgrades to trails and infrastructure.

A total of 32.7 FTE jobs (27.3 direct jobs and 5.5 indirect/induced jobs) would be generated during the construction period. The direct jobs comprise 21.9 jobs in on-site construction and 5.4 jobs in materials/equipment supply.

Trails Operations - Users

- Mountain Biker on all the trails were projected to increase from around 86,700 in 2021 (base year) to around 128,300 in year 10 (2031) – growth of around 36,000 users. The major growth was in domestic overnight visitors (interstate and intrastate) and domestic day visitors (regional users).
- Walkers on all the trails were projected to increase from around 103,200 in 2021 (base year) increasing to around 138,750 in year 10 (2031) – growth of around 35,500 users. The major growth was in domestic overnight visitors (interstate and intrastate) and domestic day visitors (regional users).

Trail Operations - User Spending

- Spending in the region by walkers, increases from \$19.7 million in the base year (2021) to around \$26.5 million in year 10 (2031).
- Spending in the region by mountain bikers increases from \$12.3 million in the base year 2021 to \$18.3 million in year 10 (2031)
- Total spending by both trail users increases from around \$32.0 million in the base year to around \$44.8 million in year 10 (2031).

Trail Operations – Jobs Generated

The estimates and projections indicate that trails (walking and mountain biking) are significant part of the visitor market in Break O Day and adjacent areas and generate jobs in local industries.

Trail visitors and their spending generate jobs in the region across several sectors.

⁶⁵ In this report walkers cover casual walkers on the trails, bush walkers and trail runners.

⁶⁶ Estimated trails development cost, TRC February 2022

- Users of the trails were estimated to generate a total of around 146 FTE jobs in the base year (2021) increasing to around 200 jobs in year 10 (2031).
 - MTB users of the trails were estimated to generate a total of around 56 FTE jobs in the base year (2021) increasing to around 81 jobs in year 10 (2031).
 - Walkers generate more jobs than mountain bikers. Walkers on the trails were estimated to generate a total of around 90 FTE jobs in the base year (2021) increasing to around 119 jobs in year 10 (2031).
- The jobs generated are mainly in recreation services (e.g. support – shuttles, guides, bike hire etc. and other activities), accommodation, food service transport and retail.

Trail Operations – Regional Income

Trail users and their spending provides a major boost to regional income (wage and salaries and business profits.)

- Users of the trails generate a total of around \$11.3 million in the base year (2021) increasing to around \$15.5 million in year 10 (2031).
 - MTB users of the trails generate a total of around \$4.3 million in the base year (2021) increasing to around \$6.3 million in year 10 (2031).
 - Walkers generate a total of around \$6.9 million in the base year (2021) increasing to around \$9.3 million in year 10 (2031).

Trail Operations – Other Benefits

There are several other benefits that can be estimated for the trails. These are: health benefits and productivity benefits associated with exercise; and a consumer valuation of the trails experience (measured by a shadow price or the notional amount people would be willing to pay for a use of a trail).

- Total other measured benefits increase from \$7.8 million in the base year (2021) to \$10.9 million in year 10. Total for 10 years is \$102.5 million.
 - Other benefits for mountain bikers increase from \$3.6 million in the base year (2021) to \$5.4 million in year 10 (2031). Total for 10 years is \$48.8 million.

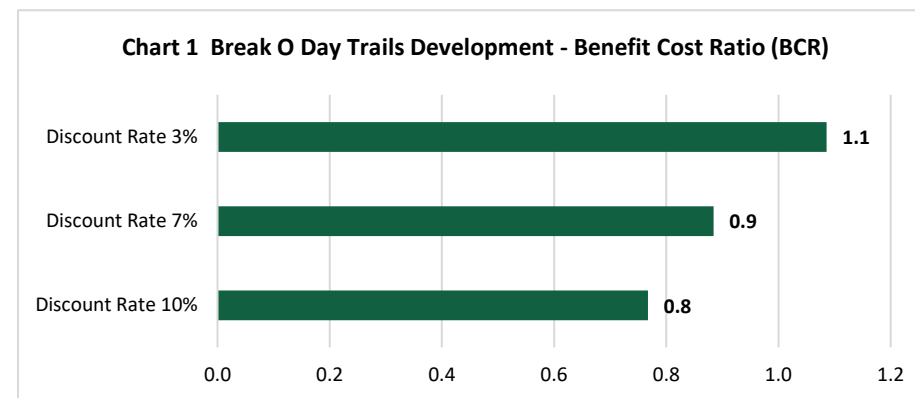
- Other benefits for walkers increase from \$4.2 million in the base year (2021) to \$5.6 million in year 10 (2031). Total for 10 years is \$53.7 million.

Benefit/Cost Analysis

All benefits and costs are analysed for a 10-year period for the trails development and improvements. The measured benefits are those associated with the growth in user numbers (from the estimated 2021 base numbers) over the 10 year period. Total trail users would increase by around 77,100 over the 10 year period (mountain bikers = 41,600 and walkers =35,500). The benefits compared with costs are those associated with this projected growth in users.

Figure 21. The chart below compares Benefit Cost Ratios (BCR) for the 3 discount rates. The BCR for a 3% discount rate is 1.1, and for a 7% discount rate is 0.9. Break O Day Trails Development - Benefit Cost Ratio (BCR)

Source: MCA Modelling and Analysis March 2022



Introduction

This report provides an economic impact assessment of the Break O Day trails network and a cost benefit analysis of the proposed new trails and improvements to existing trails. The results are indicative of the benefits of the extended trails for walkers and mountain bikers.⁶⁷ The modelling is based on: 10 year estimates of annual users (walkers and mountain bikers) for the existing and extended trails; other assumptions utilised in quantifying spending in the region; and estimates of other benefits.

The economic benefits of the trail arise from: spending by these users/visitors in the towns adjacent to the trail and other spending in the broader region; health and productivity benefits of active recreation activities; and a notional value of the trail to individual users.

Visitors from outside the region (particularly overnight visitors/users) generate significant expenditure covering: food and beverage; accommodation (for overnight stayers); recreation and other services; and transport.

The economic impacts of the development of the trail are modelled for both the construction phase and the operations phase. The impacts are measured in terms of: full time equivalent jobs (FTE); and the increase in regional income that is generated by trail users and their spending in the region.⁶⁸

The economic impact analysis has been undertaken by MCA <Michael Connell and Assocs.> - economic consultants.

⁶⁷ In this report walkers cover casual walkers on the trails, bush walkers and trail runners.

⁶⁸ Regional income is the total net income generated from the activity and covers wages and salaries of employees and profits of businesses within the region. It includes income generated directly within the business and indirect income, which is generated in other regional businesses (wages and profits) from the multiplier impacts of employee spending on the region. In the modelling of income generated, income tax and GST on spending, are both treated as leakages from the region.

Construction phase – economic impacts

The economic impacts of the development of the trail are modelled for both the construction phase and the operations phase. The impacts are measured in terms of: full time equivalent jobs (FTE); and the increase in regional income that is generated by trail users and their spending in the region.⁶⁹

A significant number of jobs and an increase in regional income will be generated during the construction phase of the project.

Trails Construction

Construction costs for the trails development is estimated at \$6.995 million.⁷⁰ This includes new trail segments and upgrades to trails and infrastructure

Table 14. Break O Day Trails Capital Spending Estimates(\$ 2022 prices)

Break O Day Trails	Estimates
Proposed Capital Spending	\$2022 prices
Georges Bay Trail (existing and proposed)	\$4,000,000
St Patricks Head Walking Trail (proposed and existing)	\$650,000
Moulting Bay Cultural Trail (proposed).	\$400,000
The Nicholas Range Adventure Trail (proposed).	\$400,000
The Leeabarra, Douglas Apsley Multi Day Walk	\$600,000
St Marys to Cornwall Rail Trail (total)	\$945,000
Total Capital Costs	\$6,995,000

⁶⁹ Regional income is the total net income generated from the activity and covers wages and salaries of employees and profits of businesses within the region. It includes income generated directly within the business and indirect income, which is generated in other regional businesses (wages and profits) from the multiplier impacts of employee spending on the region. In the modelling of income generated, income tax and GST on spending, are both treated as leakages from the region.

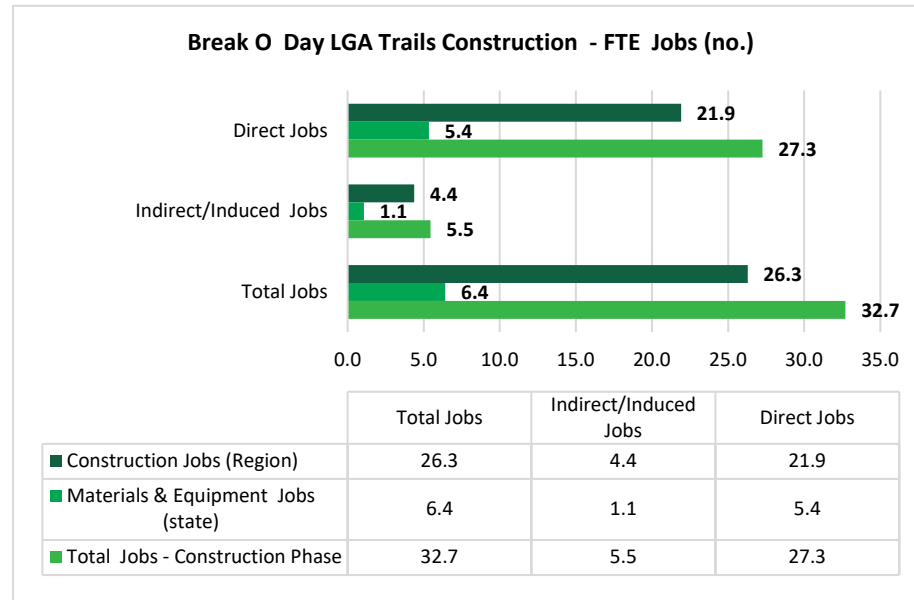
⁷⁰ Estimated development cost, Break O Day Council November 2022

Source. TRC estimates February 2022

Economic Impacts - Construction Phase

A total of 32.7 FTE jobs (27.3 direct jobs and 5.5 indirect/induced jobs) would be generated during the construction period. The direct jobs comprise 21.9 jobs in on-site construction and 5.4 jobs in materials/equipment supply.

Figure 22. Break O'Day LGA Trails Construction - FTE Jobs (no.)



Source: MCa Modelling and Analysis March 2022. May be some differences due to rounding.

Table 15. Construction Phase Break O'Day Trails –Jobs FTE Generated (no.)

Construction Phase FTE Jobs	Direct Jobs	Indirect/ Induced Jobs	Total Jobs
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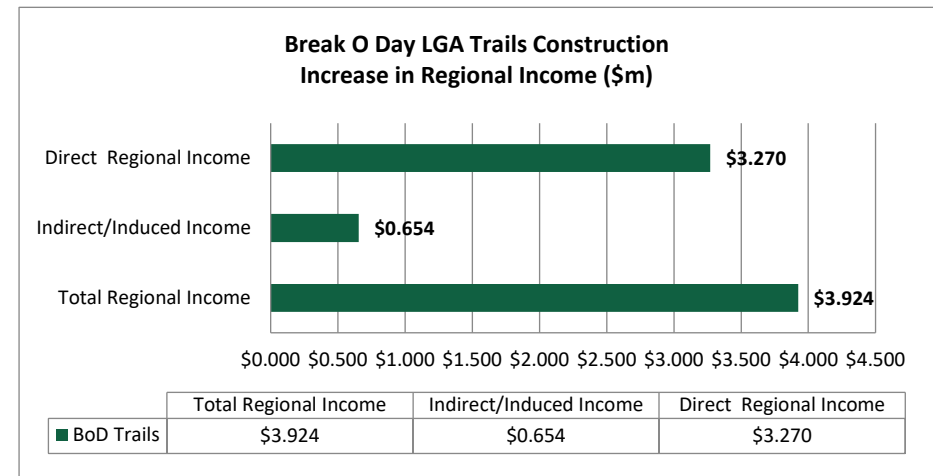
⁷¹ This assumes the construction workforce would come from the Break o Day Region and adjacent areas.

Construction Jobs (Region)	21.9	4.4	26.3
Materials and Equipment Jobs (stat -wide)	5.4	1.1	6.4
Total Jobs - Construction Phase	27.3	5.5	32.7

Source: MCa modelling and estimates, March 2022. May be some differences due to rounding

During the construction period a total of \$3.924 million in regional income would be generated (\$3.270 million direct income and \$0.654 million indirect/induced). ⁷¹

Figure 23. Break O Day Trails Construction Increase in Regional Income (\$m)



Source: MCa modelling and estimates, March 2022. May be some differences due to rounding.

Operations phase – economic impacts

ANALYSING TRAIL IMPACTS

The operations phase economic impacts of the trail are driven by the expenditure of visitors/users in towns adjacent to the trails and in the broader region. MCA's regional economic model is used to estimate the employment and income impacts of the trails network. The model allocates spending across relevant industry sectors and takes account of the significant shares of the gross spending by visitors/users, which leaks out of the region.⁷²

Two types of analysis were undertaken:

- a. Estimates of the number of trail users (mountain bikers and walkers) and development of 10 year projections (based on growth in both user markets and the extended/improved trails) and the total benefits to the region.
- b. Benefit cost analysis: estimation of the growth in trail users over this period to measure benefits compared with the proposed capital spending (\$6.995 million) on new trails and trail improvements.

The analysis of each of the trail user segments allows for a comparative assessment of the economic impacts of trail users on the Break O Day regional economy.

⁷² The spending by trail users is not the economic impact and does not represent the increase in regional income. There is a major leakage of this spending out of the region due to : the GST (10%); and a significant component of the value of services and products purchased by visitors comes from outside the region (e.g. food ingredients, soft drinks, beer , consumer

BREAK O' DAY TRAILS – USER ESTIMATES

The following are estimates for trail users over a 10-year period. Using all the available data in the TRC report and other reports, trail use was estimated for a base year of 2021.

- Projections were then developed for the 10-year period 2022-2031.⁷³
 - Mountain bikers (total on all trails) annual growth of 4% per year was used. This reflects: the continuing increase in participation; growth in the market and increased visitation to the East Coast; and the extended trails.
 - Walkers (total on all trails), growth of 3% per year was used. This reflects: ongoing growth in this active recreation market; increased visitation to the East Coast; and extended walking trails.

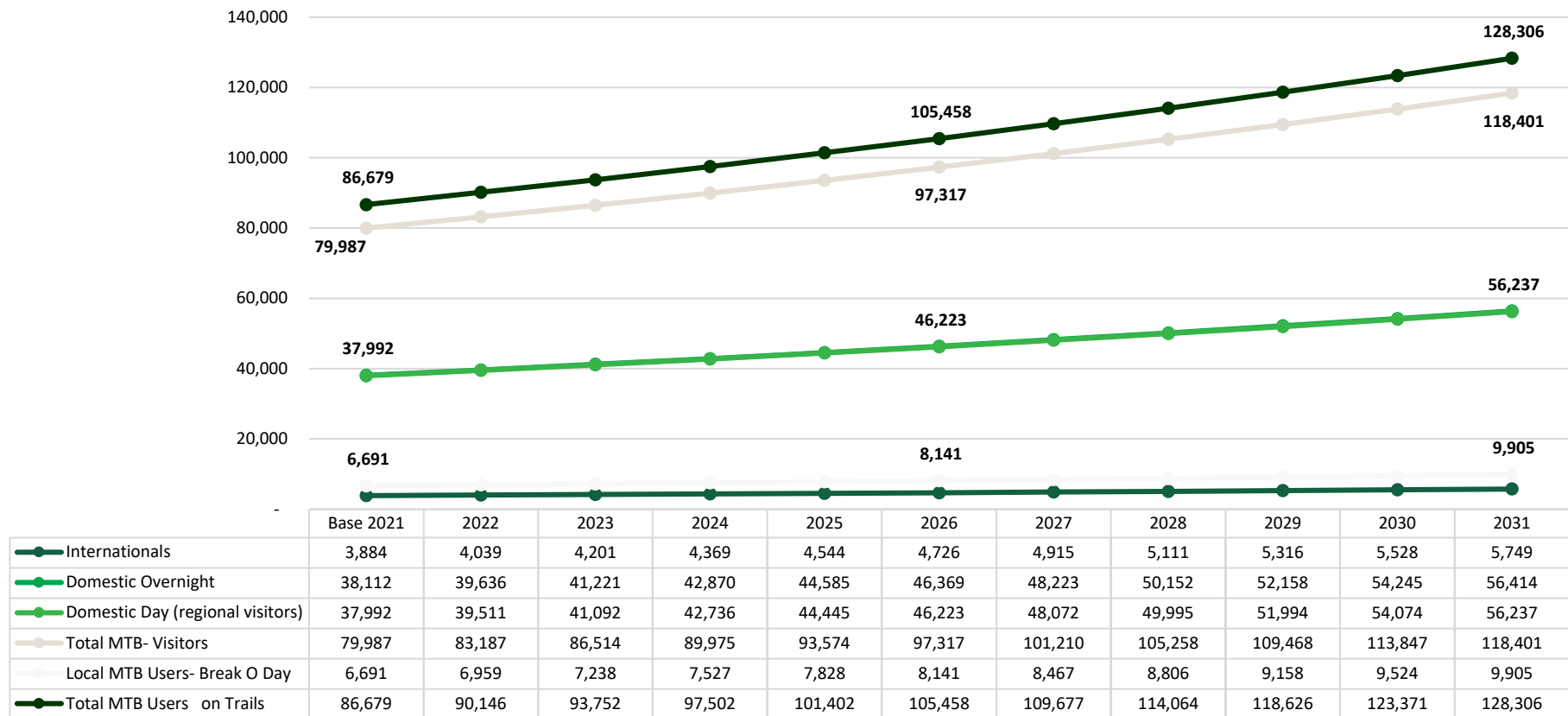
products bought etc.). The model takes account of these leakages and estimates employment impacts and the increase in regional income that accrue to the region where the trail is located.

⁷³ See Appendix A for details of assumptions used in developing the trail user projections.

MOUNTAIN BIKERS – TRAIL USERS

Mountain Bikers on the trails were projected to increase from around 86,700 in 2021 (base year) to around 128,300 in year 10 (2031) – growth of around 36,000 users. The major growth was in domestic overnight visitors (interstate and intrastate) and domestic day visitors (regional users).

Figure 24. MTB Trail Users Projections 10 Years



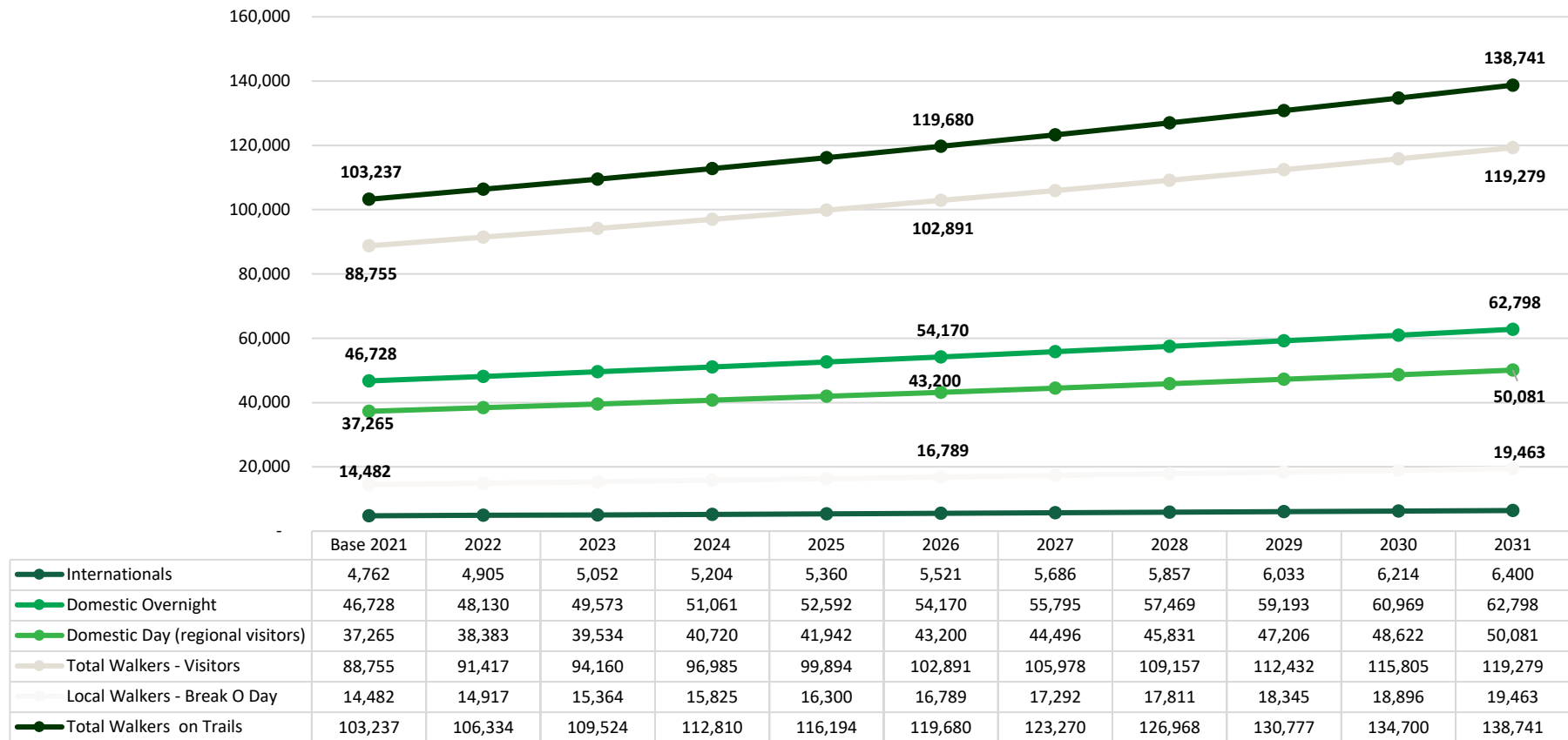
Source: MCa modelling and estimates, March 2022.

WALKERS – TRAIL USERS

The walkers estimated include bushwalkers, trail runners and other persons walking on the trails.

Walkers on the trails were projected to increase from around 103,200 in 2021 (base year) increasing to around 138,750 in year 10 (2031) – growth of around 35,500 users. The major growth was in domestic overnight visitors (interstate and intrastate) and domestic day visitors (regional users).

Figure 25. Walkers Trail User Projection 10 Years



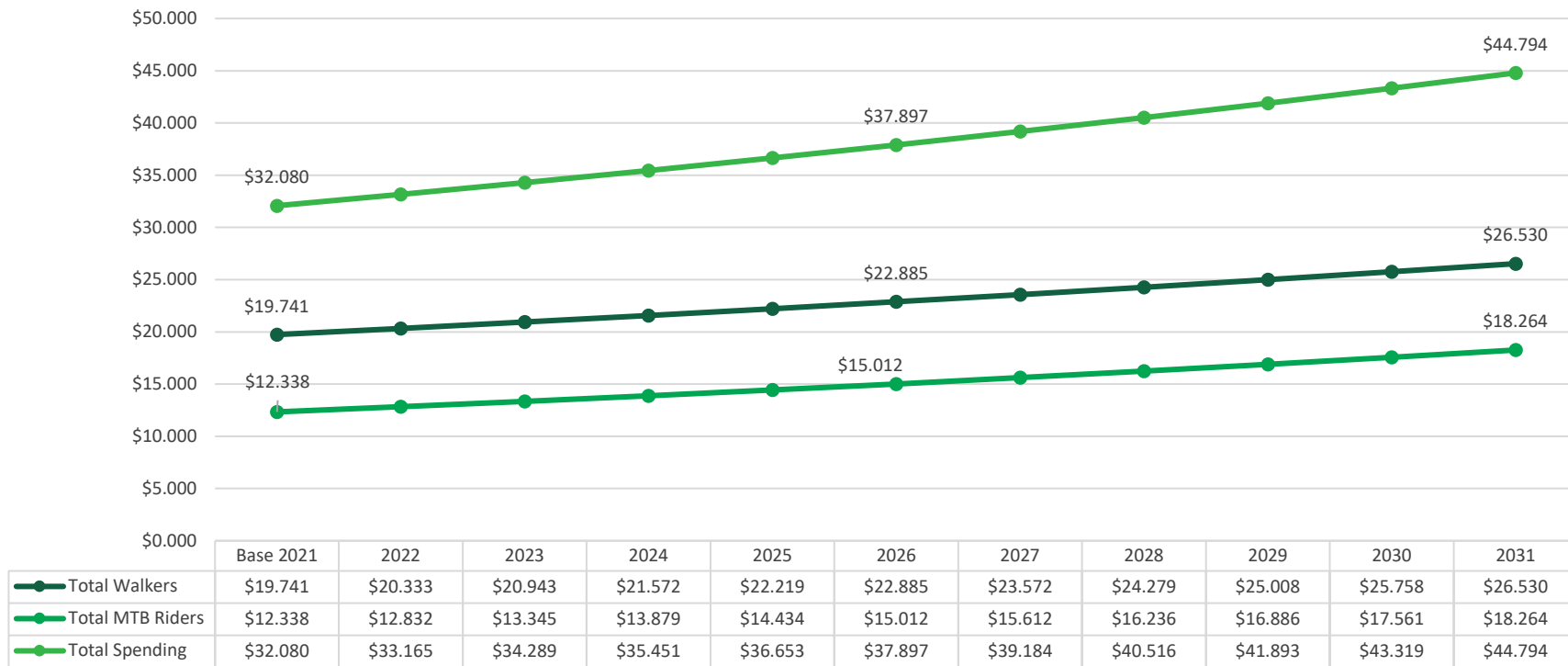
Source: MCa modelling and estimates, March 2022.

SPENDING IN REGION

The user projections drive the estimated spending in the region. Spending estimates are based mainly on TRA spending data for Break O Day LGA (2019)⁷⁴. The following is total spending in the region based on trail user numbers.

- Spending in the region by walkers increases from \$19.7 million in the base year (2021) to around \$26.5 million in year 10 (2031).
- Spending in the region by mountain bikers increases from \$12.3 million in the base year 2021 to \$18.3 million in year 10 (2031)
- Total spending by both trail users increases from around \$32.0 million in the base year to around \$44.8 million in year 10 (2031).

Figure 26. Spending in Region by Trail Users (\$million 2022 prices)



Source: MCa modelling and estimates, March 2022. May be some differences due to rounding.

⁷⁴ Local Government Area Profile, Break O Day LGA 2019, Tourism Research Australia.

Table 16. Spending in Region by Trail Users 10 Year Projections (\$ million 2022 prices)

Spending – Trail Users (\$ million 2022 prices)		Y1	Y2	Y3	Y4	Y5	Y6	Y7	Y8	Y9	Y10
	Base 2021	2022	2023	2024	2025	2026	2027	2028	2029	2030	2031
MTB Users on Trails											
Internationals	\$0.614	\$0.638	\$0.664	\$0.690	\$0.718	\$0.747	\$0.777	\$0.808	\$0.840	\$0.873	\$0.908
Domestic Overnight	\$10.004	\$10.404	\$10.821	\$11.253	\$11.704	\$12.172	\$12.659	\$13.165	\$13.692	\$14.239	\$14.809
Domestic Day (regional visitors)	\$1.520	\$1.580	\$1.644	\$1.709	\$1.778	\$1.849	\$1.923	\$2.000	\$2.080	\$2.163	\$2.249
Total Walkers - Visitors	\$12.138	\$12.623	\$13.128	\$13.653	\$14.199	\$14.767	\$15.358	\$15.972	\$16.611	\$17.276	\$17.967
Local Walkers - Break O Day	\$0.201	\$0.209	\$0.217	\$0.226	\$0.235	\$0.244	\$0.254	\$0.264	\$0.275	\$0.286	\$0.297
Total Walkers on Trails	\$12.338	\$12.832	\$13.345	\$13.879	\$14.434	\$15.012	\$15.612	\$16.236	\$16.886	\$17.561	\$18.264
Walkers on Trails											
Internationals	\$1.505	\$1.550	\$1.597	\$1.644	\$1.694	\$1.745	\$1.797	\$1.851	\$1.906	\$1.964	\$2.022
Domestic Overnight	\$16.355	\$16.845	\$17.351	\$17.871	\$18.407	\$18.960	\$19.528	\$20.114	\$20.718	\$21.339	\$21.979
Domestic Day (regional visitors)	\$1.491	\$1.535	\$1.581	\$1.629	\$1.678	\$1.728	\$1.780	\$1.833	\$1.888	\$1.945	\$2.003
Total MTB Users - Visitors	\$19.350	\$19.931	\$20.529	\$21.144	\$21.779	\$22.432	\$23.105	\$23.798	\$24.512	\$25.248	\$26.005
Local Walkers - Break O Day	\$0.391	\$0.403	\$0.415	\$0.427	\$0.440	\$0.453	\$0.467	\$0.481	\$0.495	\$0.510	\$0.525
Total MTB Users on Trails	\$19.741	\$20.333	\$20.943	\$21.572	\$22.219	\$22.885	\$23.572	\$24.279	\$25.008	\$25.758	\$26.530
Total Trail Users											
Internationals	\$2.119	\$2.188	\$2.261	\$2.334	\$2.412	\$2.492	\$2.574	\$2.659	\$2.746	\$2.837	\$2.930
Domestic Overnight	\$26.359	\$27.249	\$28.172	\$29.124	\$30.111	\$31.132	\$32.187	\$33.279	\$34.410	\$35.578	\$36.788
Domestic Day (regional visitors)	\$3.011	\$3.115	\$3.225	\$3.338	\$3.456	\$3.577	\$3.703	\$3.833	\$3.968	\$4.108	\$4.252
Total Walkers - Visitors	\$31.488	\$32.554	\$33.657	\$34.797	\$35.978	\$37.199	\$38.463	\$39.770	\$41.123	\$42.524	\$43.972
Local Walkers - Break O Day	\$0.592	\$0.612	\$0.632	\$0.653	\$0.675	\$0.697	\$0.721	\$0.745	\$0.770	\$0.796	\$0.822
Total Trail Users	\$32.079	\$33.165	\$34.288	\$35.451	\$36.653	\$37.897	\$39.184	\$40.515	\$41.894	\$43.319	\$44.794

Source: MCa modelling and estimates, March 2022. May be some differences due to rounding.

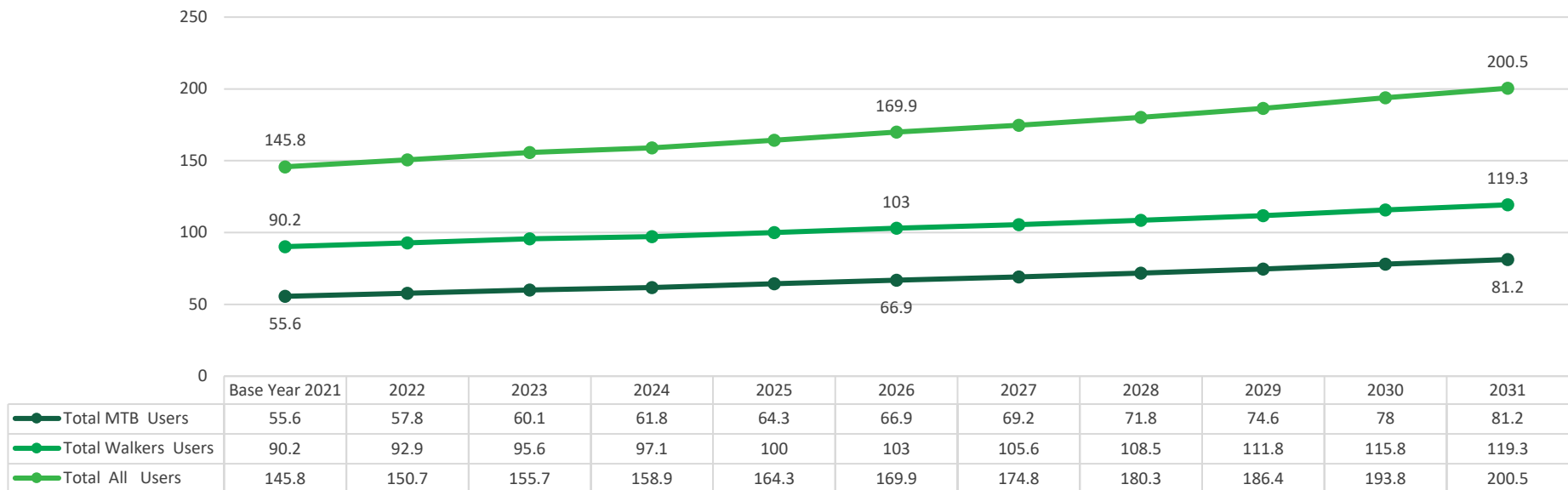
EMPLOYMENT IMPACTS - JOBS GENERATED

The estimates and projections indicate that trails (walking and mountain biking) are a significant part of the visitor market in Break O Day and adjacent areas and generate jobs in local industries. Both market segments are growing.

Trail visitors and their spending generate jobs in the region across several sectors.

- Users of the trails were estimated to generate a total of around 146 FTE jobs in the base year (2021) increasing to around 200 jobs in year 10 (2031).
 - MTB users of the trails were estimated to generate a total of around 56 FTE jobs in the base year (2021) increasing to around 81 jobs in year 10 (2031).
 - Walkers generate more jobs than mountain bikers. Walkers on the trails were estimated to generate a total of around 90 FTE jobs in the base year (2021) increasing to around 119 jobs in year 10 (2031).
- The jobs generated are mainly in recreation services (e.g. support – shuttles, guides, bike hire etc., and other activities), accommodation, food service transport, and retail.

Figure 27. Jobs in Region Generated by Trail Users (no. FTE)



Source: MCa modelling and estimates, March 2022. May be some differences due to rounding.

Table 17. Jobs Generated in Break O Day Region by Trail Users (FTE no.)

Trail Users – MTB Riders		Y1	Y2	Y3	Y4	Y5	Y6	Y7	Y8	Y9	Y10
Jobs Generated (FTE)	Base Year 2021	2022	2023	2024	2025	2026	2027	2028	2029	2030	2031
MTB Riders											
Internationals	3.5	3.6	3.7	3.4	3.6	3.7	3.8	4.0	4.1	4.3	4.5
Domestic Overnight	43.8	45.5	47.3	48.9	50.8	52.9	54.7	56.8	59.1	61.8	64.3
Domestic Day (regional visitors)	7.5	7.8	8.1	8.4	8.7	9.1	9.4	9.7	10.1	10.6	11.0
Total MTB - Visitors	54.7	56.9	59.2	60.7	63.2	65.7	68.0	70.6	73.4	76.7	79.8
Local MTB- Break O Day	0.9	0.9	0.9	1.1	1.1	1.2	1.2	1.2	1.3	1.3	1.4
Total MTB Users	55.6	57.8	60.1	61.8	64.3	66.9	69.2	71.8	74.6	78.0	81.2
Walkers											
Internationals	8.1	8.4	8.6	8.0	8.3	8.5	8.7	9.0	9.2	9.6	9.9
Domestic Overnight	73.0	75.2	77.5	79.1	81.5	84.0	86.1	88.5	91.1	94.4	97.2
Domestic Day (regional visitors)	7.3	7.5	7.8	8.0	8.2	8.5	8.7	8.9	9.2	9.5	9.8
Total Walkers - Visitors	88.5	91.1	93.8	95.2	98.0	101.0	103.5	106.4	109.6	113.5	116.9
Local Walkers - Break O Day	1.7	1.7	1.8	1.9	2.0	2.0	2.1	2.1	2.2	2.3	2.3
Total Walkers Users	90.2	92.9	95.6	97.1	100.0	103.0	105.6	108.5	111.8	115.8	119.3
Total Trails Users											
Internationals	11.6	12	12.3	11.4	11.9	12.2	12.5	13	13.3	13.9	14.4
Domestic Overnight	116.8	120.7	124.8	128	132.3	136.9	140.8	145.3	150.2	156.2	161.5
Domestic Day (regional visitors)	14.8	15.3	15.9	16.4	16.9	17.6	18.1	18.6	19.3	20.1	20.8
Total - All Visitors	143.2	148	153	155.9	161.2	166.7	171.5	177	183	190.2	196.7
Total Local Break O Day	2.6	2.6	2.7	3	3.1	3.2	3.3	3.3	3.5	3.6	3.7
Total All Users	145.8	150.7	155.7	158.9	164.3	169.9	174.8	180.3	186.4	193.8	200.5

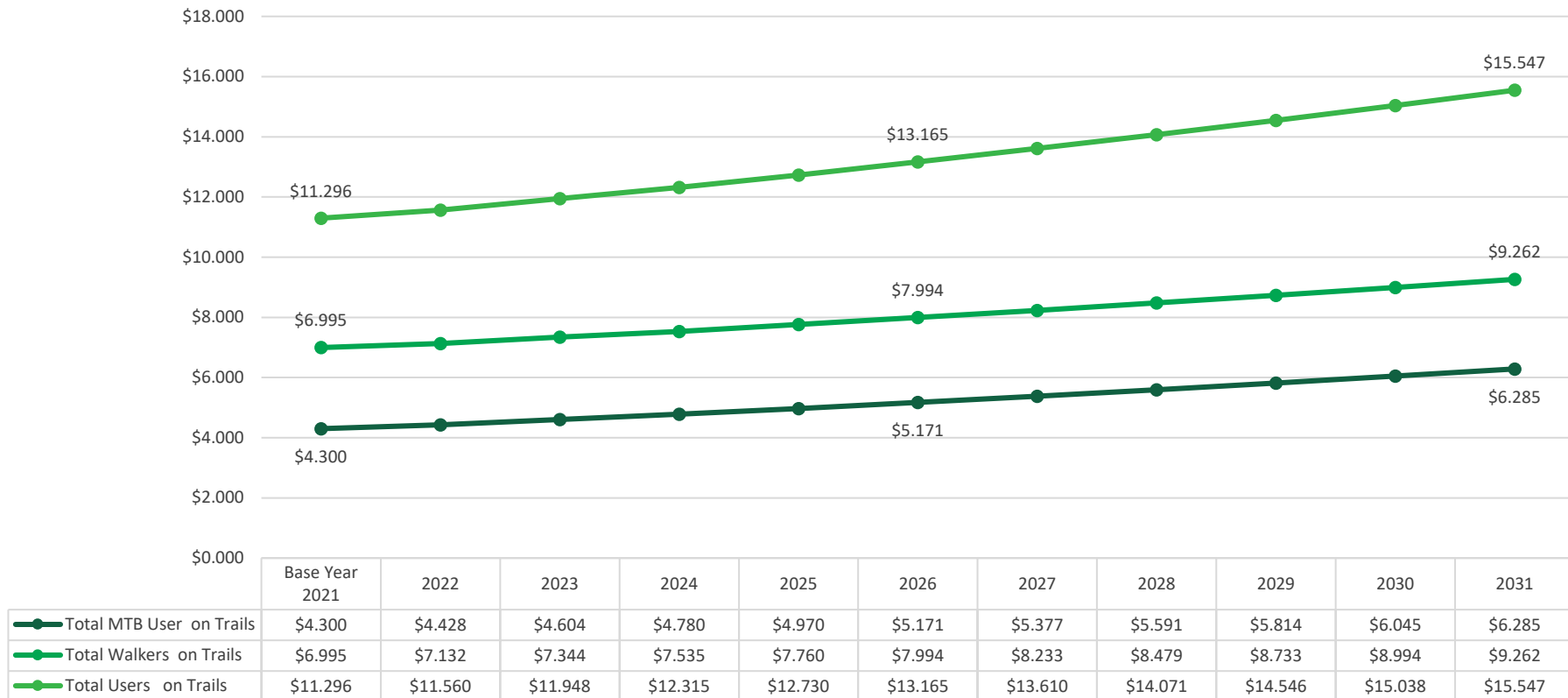
Source: MCA modelling and estimates, March 2022. May be some differences due to rounding.

REGIONAL INCOME IMPACTS

Trail users and their spending provides a major boost to regional income (wage and salaries and business profits.)

- Users of the trails generate a total of around \$11.3 million in the base year (2021) increasing to around \$15.5 million in year 10 (2031).
- MTB users of the trails generate a total of around \$4.3 million in the base year (2021) increasing to around \$6.3 million in year 10 (2031).
- Walkers generate a total of around \$6.9 million in the base year (2021) increasing to around \$9.3 million in year 10 (2031).

Figure 28. Regional Income Generated by Break O'Day Trails Users (\$ million 2022 prices)



Source: MCa Modelling and Analysis March 2022 - May be some differences due to rounding

Table 18. Regional Income by Trail Users (\$ million 2022 prices)

Regional Income 2022 prices)		Y1	Y2	Y3	Y4	Y5	Y6	Y7	Y8	Y9	Y10	
	Base Year 2021	2022	2023	2024	2025	2026	2027	2028	2029	2030	2031	Total 10 Years
MTB Users												
Internationals	\$0.276	\$0.244	\$0.254	\$0.273	\$0.284	\$0.296	\$0.307	\$0.319	\$0.332	\$0.344	\$0.358	\$3.286
Domestic Overnight	\$3.394	\$3.530	\$3.670	\$3.790	\$3.941	\$4.099	\$4.263	\$4.433	\$4.610	\$4.795	\$4.986	\$45.511
Domestic Day (regional visitors)	\$0.565	\$0.588	\$0.611	\$0.636	\$0.661	\$0.688	\$0.715	\$0.744	\$0.773	\$0.804	\$0.836	\$7.621
Total MTB- Visitors	\$4.235	\$4.362	\$4.534	\$4.699	\$4.886	\$5.083	\$5.285	\$5.496	\$5.715	\$5.943	\$6.179	\$56.419
Local MTB - Break O Day	\$0.065	\$0.067	\$0.069	\$0.081	\$0.084	\$0.088	\$0.091	\$0.095	\$0.098	\$0.102	\$0.105	\$0.947
Total MTB User on Trails	\$4.300	\$4.428	\$4.604	\$4.780	\$4.970	\$5.171	\$5.377	\$5.591	\$5.814	\$6.045	\$6.285	\$57.365
Walkers												
Internationals	\$0.644	\$0.593	\$0.610	\$0.637	\$0.656	\$0.677	\$0.697	\$0.717	\$0.738	\$0.760	\$0.783	\$7.513
Domestic Overnight	\$5.670	\$5.840	\$6.013	\$6.146	\$6.330	\$6.520	\$6.716	\$6.917	\$7.124	\$7.338	\$7.558	\$72.171
Domestic Day (regional visitors)	\$0.554	\$0.571	\$0.588	\$0.606	\$0.624	\$0.643	\$0.662	\$0.682	\$0.702	\$0.723	\$0.744	\$7.099
Total Walkers - Visitors	\$6.869	\$7.003	\$7.212	\$7.389	\$7.610	\$7.840	\$8.074	\$8.316	\$8.565	\$8.821	\$9.085	\$86.784
Local Walkers - Break O Day	\$0.127	\$0.129	\$0.133	\$0.145	\$0.149	\$0.154	\$0.159	\$0.163	\$0.168	\$0.173	\$0.178	\$1.677
Total Walkers on Trails	\$6.995	\$7.132	\$7.344	\$7.535	\$7.760	\$7.994	\$8.233	\$8.479	\$8.733	\$8.994	\$9.262	\$88.461
Total Trail Users												
Internationals	\$0.920	\$0.837	\$0.864	\$0.911	\$0.940	\$0.972	\$1.004	\$1.036	\$1.070	\$1.105	\$1.141	\$10.799
Domestic Overnight	\$9.064	\$9.370	\$9.683	\$9.936	\$10.271	\$10.620	\$10.979	\$11.350	\$11.735	\$12.132	\$12.544	\$117.683
Domestic Day (regional visitors)	\$1.120	\$1.159	\$1.199	\$1.242	\$1.285	\$1.331	\$1.377	\$1.426	\$1.475	\$1.527	\$1.580	\$14.720
Total Users - Visitors	\$11.104	\$11.365	\$11.746	\$12.088	\$12.496	\$12.923	\$13.360	\$13.813	\$14.280	\$14.764	\$15.264	\$143.202
Local Users - Break O Day	\$0.192	\$0.195	\$0.202	\$0.227	\$0.234	\$0.243	\$0.250	\$0.258	\$0.266	\$0.274	\$0.283	\$2.624
Total Users on Trails	\$11.296	\$11.560	\$11.948	\$12.315	\$12.730	\$13.165	\$13.610	\$14.071	\$14.546	\$15.038	\$15.547	\$145.826

Source: MCa Modelling and Analysis March 2022 - May be some differences due to rounding

OTHER BENEFITS

There are several other benefits that can be estimated for the trails. These are: health benefits and productivity benefits associated with exercise; and a consumer valuation of the trails experience (measured by a shadow price or the notional amount people would be willing to pay for a use of a trail). These have been estimated for mountain bike trail users and walkers using the trails. These benefits are additional to the increase in regional income generated by trail users' spending in the region. As part of a regional impact assessment, health and productivity benefits were only measure for local users (Break O Day residents) and regional users (adjacent LGAs).

- Total other measured benefits increase from \$7.8 million in the base year (2021) to \$10.9 million in year 10. Total for 10 years is \$102. 5 million.
- Other benefits for mountain bikers increase from \$3.6 million in the base year (2021) to \$5.4 million in year 10 (2031). Total for 10 years is \$48.8 million.
- Other benefits for walkers increase from \$4.2 million in the base year (2021) to \$5.6 million in year 10 (2031). Total for 10 years is \$53.7 million.

Figure 29. Break O'Day Trails Users - Other Benefits (\$ million 2022 prices)



Source: MCA Modelling and Analysis March 2022 - May be some differences due to rounding

Table 19. Break O'Day Trail Users – Estimates Other Benefits (\$ million 2020 Prices)

Summary Benefits		Y1	Y2	Y3	Y4	Y5	Y6	Y7	Y8	Y9	Y10	
(\$ million 2020 prices)	Base Year 2021	2022	2023	2024	2025	2026	2027	2028	2029	2030	2031	Total 10 years
Mountain Bikers												
Health Benefits	\$2.118	\$2.203	\$2.291	\$2.382	\$2.478	\$2.577	\$2.680	\$2.787	\$2.899	\$3.015	\$3.135	\$28.564
Productivity Benefits	\$0.339	\$0.353	\$0.367	\$0.381	\$0.397	\$0.413	\$0.429	\$0.446	\$0.464	\$0.483	\$0.502	\$4.574
Consumer Value	\$1.161	\$1.207	\$1.256	\$1.306	\$1.358	\$1.412	\$1.469	\$1.528	\$1.589	\$1.652	\$1.718	\$15.656
Total Other Benefits - Mountain Bikers	\$3.618	\$3.763	\$3.913	\$4.070	\$4.233	\$4.402	\$4.578	\$4.761	\$4.951	\$5.150	\$5.356	\$48.794
Regional Income	\$4.300	\$4.428	\$4.604	\$4.780	\$4.970	\$5.171	\$5.377	\$5.591	\$5.814	\$6.045	\$6.285	\$57.365
Walkers												
Health Benefits	\$2.453	\$2.526	\$2.602	\$2.680	\$2.761	\$2.843	\$2.929	\$3.017	\$3.107	\$3.200	\$3.296	\$31.415
Productivity Benefits	\$0.393	\$0.405	\$0.417	\$0.429	\$0.442	\$0.455	\$0.469	\$0.483	\$0.498	\$0.512	\$0.528	\$5.030
Consumer Value	\$1.344	\$1.385	\$1.426	\$1.469	\$1.513	\$1.559	\$1.605	\$1.653	\$1.703	\$1.754	\$1.807	\$17.219
Total Other Benefits - Walkers	\$4.190	\$4.316	\$4.445	\$4.578	\$4.716	\$4.857	\$5.003	\$5.153	\$5.308	\$5.467	\$5.631	\$53.664
Regional Income	\$6.995	\$7.132	\$7.344	\$7.535	\$7.760	\$7.994	\$8.233	\$8.479	\$8.733	\$8.994	\$9.262	\$88.461
Total All Users												
Health Benefits	\$4.571	\$4.729	\$4.893	\$5.063	\$5.238	\$5.420	\$5.609	\$5.804	\$6.006	\$6.215	\$6.431	\$59.979
Productivity Benefits	\$0.732	\$0.757	\$0.783	\$0.811	\$0.839	\$0.868	\$0.898	\$0.929	\$0.962	\$0.995	\$1.030	\$9.604
Consumer Value	\$2.505	\$2.592	\$2.682	\$2.775	\$2.871	\$2.971	\$3.074	\$3.181	\$3.292	\$3.406	\$3.525	\$32.874
Total Other Benefits - All Users	\$7.808	\$8.078	\$8.358	\$8.648	\$8.948	\$9.259	\$9.581	\$9.914	\$10.259	\$10.616	\$10.986	\$102.457
Regional Income	\$11.296	\$11.560	\$11.948	\$12.315	\$12.730	\$13.165	\$13.610	\$14.071	\$14.546	\$15.038	\$15.547	\$145.826

Source: MCA Modelling and Analysis March 2022 - May be some differences due to rounding

Benefit cost analysis – trails development

The benefits and costs are analysed for a 10-year period for the trails development and improvements. The measured benefits are those associated with the growth in user numbers (from the estimated 2021 base numbers) over the 10 year period. Appendix B shows the increase in number of trail users, their spending and all the measured benefits.

TRAIL COSTS - 10 YEARS

The estimated construction cost of the trails project is \$6.995 million, and the 10-year maintenance costs are \$1.049 million (assumed to be 1.5% of capital cost or \$54,975 per year over 10 years), for a total 10-year cost of \$8.044 million.

Table 20. Break O Day Trails Development - 10 Years (constant prices \$2022)

Break O Day Trails	Estimates
Proposed Capital Spending	\$2022 prices
Georges Bay Trail (existing and proposed)	\$4,000,000
St Patricks Head Walking Trail (proposed and existing)	\$650,000
Moulting Bay Cultural Trail (proposed).	\$400,000
The Nicholas Range Adventure Trail (proposed).	\$400,000
The Leeabarra, Douglas Apsley Multi Day Walk	\$600,000
St Marys to Cornwall Rail Trail (total)	\$945,000
Total Capital Costs	\$6,995,000

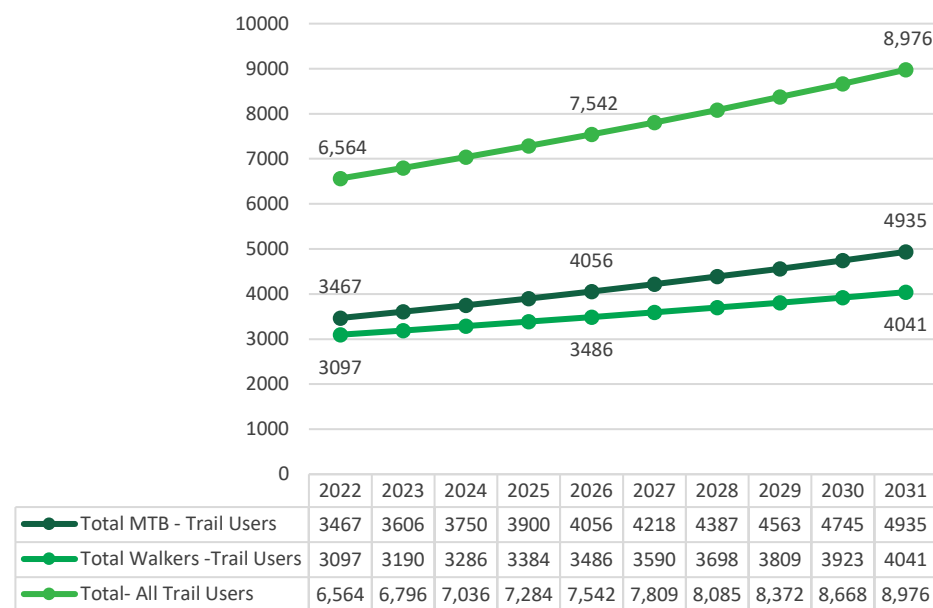
Source: TRC Estimates February 2022

INCREASE IN TRAIL USERS

The following chart and table show the annual increase in trail users over the 10-year period. The increase in trail users is used in the benefit cost analysis, with the estimated benefits compared with the development cost of the trails.

Total trail users would increase by around 77,100 over the 10-year period (mountain bikers = 41,600 and walkers =35,500).

Figure 30. Break O'Day Trails Projected Increase in Trail Users - 10 years (no.)



Source: MCa Modelling and Analysis March 2022

Table 21. Annual Increase in Trail Users - 10 Years

Trail Users Projections	Increase on previous year										Total 10yrs
	Y1	Y2	Y3	Y4	Y5	Y6	Y7	Y8	Y9	Y10	
	2022	2023	2024	2025	2026	2027	2028	2029	2030	2031	
Mountain Bikers											
Internationals	155	162	168	175	182	189	197	204	213	221	1865
Domestic Overnight	1524	1585	1649	1715	1783	1855	1929	2006	2086	2170	18303
Domestic Day (regional visitors)	1520	1580	1644	1709	1778	1849	1923	2000	2080	2163	18245
Total Walkers - Visitors	3199	3327	3461	3599	3743	3893	4048	4210	4379	4554	38414
Local Walkers - Break O Day	268	278	290	301	313	326	339	352	366	381	3214
Total MTB - Trail Users	3467	3606	3750	3900	4056	4218	4387	4563	4745	4935	41627
Walkers											
Internationals	143	147	152	156	161	166	171	176	181	186	1638
Domestic Overnight	1402	1444	1487	1532	1578	1625	1674	1724	1776	1829	16070
Domestic Day (regional visitors)	1118	1151	1186	1222	1258	1296	1335	1375	1416	1459	12816
Total Walkers - Visitors	2663	2743	2825	2910	2997	3087	3179	3275	3373	3474	30524
Local Walkers - Break O Day	434	447	461	475	489	504	519	534	550	567	4981
Total Walkers -Trail Users	3097	3190	3286	3384	3486	3590	3698	3809	3923	4041	35505
Total All Trail Users											
Internationals	298	309	320	331	343	355	367	380	394	408	3,503
Domestic Overnight	2,926	3,029	3,136	3,247	3,361	3,480	3,603	3,730	3,862	3,999	34,373
Domestic Day (regional visitors)	2,638	2,732	2,830	2,931	3,036	3,145	3,258	3,375	3,496	3,622	31,061
Total Walkers - Visitors	5,862	6,070	6,285	6,509	6,740	6,979	7,228	7,485	7,752	8,028	68,938
Local Walkers - Break O Day	702	726	750	776	802	829	857	887	917	948	8,194
Total - All Trail Users	6,564	6,796	7,036	7,284	7,542	7,809	8,085	8,372	8,668	8,976	77,132

Source: MCa Modelling and Analysis March 2022

MEASURING BENEFITS – INCREASE IN TRAIL USERS

The measured benefits for the additional trail users were estimated and these comprise:

- **Regional income:** increase in regional income generated by the spending in the region by additional users of the trails over the 10-year period. Totals \$10.332 million for the additional trail users
- **Health benefits:** exercise leads to avoided health costs (adjusted for injury) for participants. These benefits were estimated at \$1.609 million for the additional trail users.
- **Productivity benefits:** fit employees are more productive, and this benefit was estimated at \$0.290 million over 10 years.
- **Consumer value:** there are no charges for using the trails. The consumer value is a shadow price that a trail user may be willing to pay for the experience.⁷⁵

The value of benefits for the increases number of users totals \$10.332 million over 10 years (MTB users =\$6.361 million and Walkers=\$3.971million).

Table 22. Measured Benefits of Increased Trail Users (\$ million 2022 prices)

Benefits – Increase in Trail Users	Y1	Y2	Y3	Y4	Y5	Y6	Y7	Y8	Y9	Y10	
(\$ million 2022 prices)	2022	2023	2024	2025	2026	2027	2028	2029	2030	2031	Total 10 years
MTB Users											
Regional Income Increase	\$0.342	\$0.355	\$0.370	\$0.384	\$0.400	\$0.416	\$0.432	\$0.449	\$0.467	\$0.485	\$4.099
Health Benefits	\$0.085	\$0.088	\$0.092	\$0.095	\$0.099	\$0.103	\$0.107	\$0.111	\$0.116	\$0.121	\$1.017
Productivity Benefits	\$0.014	\$0.014	\$0.015	\$0.015	\$0.016	\$0.017	\$0.017	\$0.018	\$0.019	\$0.019	\$0.163
Consumer Value	\$0.090	\$0.094	\$0.097	\$0.101	\$0.105	\$0.110	\$0.114	\$0.119	\$0.123	\$0.128	\$1.081
Total Benefits -MTB Users	\$0.530	\$0.551	\$0.573	\$0.596	\$0.620	\$0.645	\$0.670	\$0.697	\$0.725	\$0.754	\$6.361
Walkers – Trail Users											
Regional Income Increase	\$0.201	\$0.207	\$0.215	\$0.222	\$0.228	\$0.235	\$0.242	\$0.249	\$0.257	\$0.264	\$2.321
Health Benefits	\$0.044	\$0.054	\$0.056	\$0.057	\$0.059	\$0.061	\$0.063	\$0.064	\$0.066	\$0.068	\$0.592
Productivity Benefits	\$0.012	\$0.012	\$0.013	\$0.013	\$0.013	\$0.014	\$0.014	\$0.014	\$0.015	\$0.015	\$0.135
Consumer Value	\$0.080	\$0.083	\$0.085	\$0.088	\$0.091	\$0.093	\$0.096	\$0.099	\$0.102	\$0.105	\$0.922
Total Benefits -MTB Users	\$0.337	\$0.356	\$0.369	\$0.380	\$0.391	\$0.403	\$0.415	\$0.427	\$0.440	\$0.453	\$3.971
Total All Users											
Regional Income Increase	\$0.542	\$0.562	\$0.585	\$0.606	\$0.628	\$0.651	\$0.674	\$0.699	\$0.724	\$0.750	\$6.420

⁷⁵ The methodology used in estimating these benefits is outlined Appendix B. As part of a regional impact assessment , health and productivity benefits were only measure for local users (Break O Day residents) and regional users (adjacent LGAs).

Benefits – Increase in Trail Users	Y1	Y2	Y3	Y4	Y5	Y6	Y7	Y8	Y9	Y10	
(\$ million 2022 prices)	2022	2023	2024	2025	2026	2027	2028	2029	2030	2031	Total 10 years
Health Benefits	\$0.129	\$0.142	\$0.147	\$0.153	\$0.158	\$0.164	\$0.170	\$0.176	\$0.182	\$0.189	\$1.609
Productivity Benefits	\$0.025	\$0.026	\$0.027	\$0.028	\$0.029	\$0.030	\$0.031	\$0.032	\$0.033	\$0.035	\$0.298
Consumer Value	\$0.171	\$0.177	\$0.183	\$0.189	\$0.196	\$0.203	\$0.210	\$0.217	\$0.225	\$0.233	\$2.004
Total Benefits -All Users	\$0.867	\$0.907	\$0.942	\$0.976	\$1.011	\$1.048	\$1.085	\$1.124	\$1.165	\$1.207	\$10.332

Source: MCA Modelling and Analysis March 2022 - May be some differences due to rounding

BENEFIT COST ANALYSIS

The following table and chart compares the costs of the trails development with the benefits associated with the increase in trails usage over the 10-year period.

- The benefits are measured by: the increase in regional income generated by trail users over a 10-year period; the estimated health benefits; productivity benefits and the user value.
- The costs include construction costs, and asset maintenance costs.
- For the comparison, the present value of the benefits is calculated using 3 discount rates (3%, 7% and 10%). The capital costs covers the trail improvements and new trails.

Benefits and Cost Analysis –Total Trails Project - 10 Year Period (\$2022 prices)

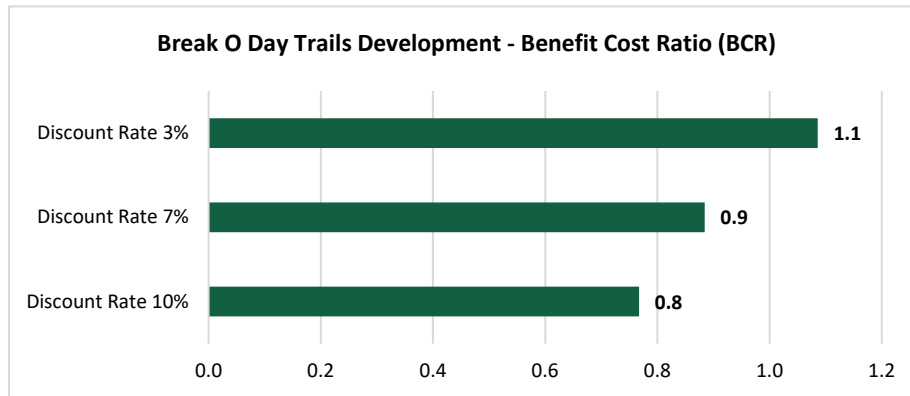
BOD New & Upgraded Trails	Discount Rate	Discount Rate	Discount Rate
Regional Cost Benefit (\$2022 prices)	3%	7%	10%
Period : 10Years			
Costs			
Capital Costs Trails & Infrastructure	\$6,995,000	\$6,995,000	\$6,995,000
Costs - Asset Maintenance (10 years)	\$1,049,250	\$1,049,250	\$1,049,250
Total Costs	\$8,044,250	\$8,044,250	\$8,044,250
Benefits - Total			
Direct Benefits Regional Income	\$ 6,420,204	\$ 6,420,204	\$ 6,420,204
Productivity Benefits	\$297,949	\$297,949	\$297,949
Health Benefits (local & regional)	\$1,609,479	\$1,609,479	\$1,609,479
User Value (shadow user price)	\$2,003,886	\$2,003,886	\$2,003,886
Total Benefits	\$10,331,518	\$10,331,518	\$10,331,518
Total Benefits (\$) Present Value	\$8,735,791	\$7,111,798	\$6,171,680
Benefit Cost			
Net Present Value (\$) Total Benefits	\$691,541	-\$932,452	-\$1,872,570
NPV/Cost	0.1	-0.1	-0.2
Benefit Cost Ratio (BCR)	1.1	0.9	0.8

<Total Benefits: Present Value/Total Capital Costs>			
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Source: MCA modelling and estimates, March 2022.

The chart below compares Benefit Cost Ratios (BCR) for the 3 discount rates, which all yield BCR above 1. For a trail project a 7% discount rate is appropriate, and the total project yields a positive BCR of 1.7. The present value of total benefits (\$7.112 million) generated by the trails investment are 1.7 times the total costs of the project (\$4.215 million) over a 10-year period.

Figure 31. Break O'Day Trails Projected Increase in Trail Users - 10 years (no.)



Source: MCA Modelling and Analysis March 2022

- Quantitative Analysis Warburton Trails, Instinct and Reason, December 2020
- Tasmanian Population Projections (Medium Scenario) by LGA 2019, Tasmanian Treasury
- TVS Analyser March 2020, Tourism Research Australia Regional Tourism Satellite Account, East Coast Tasmania 18-19
-
- Visitor Time Series Data for Break O Day LGA 2009-2019. Tourism Research Australia

References

- Ausplay National Sports and Physical Activity survey- Bushwalking Participation, December 2020
- Break O'Day Recreational Trails Strategy- Draft Report, February 2022
- LGA Area Profiles 2019, Break O Day LGA
- Mountain Biking in Australia: An Economic and Participation Analysis (AusCycling), GHD Advisory, March 2021

Appendix A : Trail user modelling assumptions

The following are the assumptions use in modelling trail users over a 10-year period. Assumptions have been informed by data available and experience with other trails.

Table 23. Table A.1 Trail User Assumptions

Trail Users	Modelling Assumptions	Data Source
Mountain Bikers		
Local Users – MTB (BOD LGA residents) Estimates for 2021 used as base year.	Population projections for Break O Day LGA (annual) to 2031 Average participation rate (national) of 3.8% applied to population. Assumes use of trails average of 26 times per year	Tasmanian Population Projections by LGA 2019, Tasmanian Treasury Instinct and Reason, Quantitative Analysis Warburton Trails, December 2020 MCA assumption
Regional Users – MTB (Day Visitors) Estimates for 2021 used as base year.	Visitor numbers for Break O Day LGA Average participation rate (national) of 10% applied to visitor numbers (3 times domestic partic rate). Day visitor estimates tested by use of population projections for adjacent LGAs: Dorset, Glamorgan/Spring Bay, Northern Midlands, Launceston Average participation rate (national) of 3.8% applied to population. Assumes use of trails average of 12 times per year	Visitor time series data for Break O Day LGA 2009-2019. TRA Instinct and Reason, Quantitative Analysis Warburton Trails, December 2020 and MCA assumption Tasmanian Population Projections by LGA 2019, Tasmanian Treasury
Overnight Visitors <ul style="list-style-type: none"> Internationals Domestic Overnights (Interstate and Intrastate) Estimates for 2021 used as base year.	Visitor numbers for Break O Day LGA Average participation rate (national) of 10% applied to visitor numbers (3 times domestic partic rate). Assumes overnight visitors have 2 rides (during average 2 night stay)	Visitor time series data for Break O Day LGA 2009-2019. TRA Instinct and Reason, Quantitative Analysis Warburton Trails, December 2020 and MCA MCA assumption
10 Year Projections	Growth rate 4% per year (market growth and trails development) – all users	MCA modelling assumption
Walkers		
Local Users – MTB (BOD LGA residents) Estimates for 2021 used as base year	Population projections for Break O Day LGA (annual) to 2031 Average participation rate (national) of 10.9% applied to population. Assumes use of trails average of 20 times per year.	Tasmanian Population Projections by LGA 2019, Tasmanian Treasury Bushwalking participation rates Tasmania Ausplay National Sports and Physical Activity survey, Bushwalking Participation December 2020) MCA assumption
Regional Users – MTB (Day Visitors) Estimates for 2021 used as base year	Visitor numbers for Break O Day LGA Average participation rate (national) of 25% applied to visitor numbers (2.5 times Tasmania partic rate). Day visitor estimates tested by use of population projections for adjacent LGAs: Dorset, Glamorgan/Spring Bay, Northern Midlands, Launceston Average participation rate (national) of 10.9 % applied to population. Assumes use of trails average of 5 times per year	Visitor time series dat for Break O Day LGA 2009-2019. TRA Bushwalking participation rates Tasmania Ausplay and MCA assumption Tasmanian Population Projections by LGA 2019, Tasmanian Treasury Bushwalking participation rates Tasmania -Ausplay
Overnight Visitors <ul style="list-style-type: none"> Internationals Domestic Overnights (Interstate and Intrastate) Estimates for 2021 used as base year	Visitor numbers for Break O Day LGA Average participation rate (national) of 25% applied to visitor numbers (2.5 times Tasmanian partic rate).	Visitor time series data for Break O Day LGA 2009-2019, TRA Bushwalking participation rates Tasmania Ausplay and MCA assumption
10 Year Projections	Growth rate 3 % per year (market growth and trails development) – all users	MCA modelling assumption

Table 24. Table A.2 Spending Assumptions

Trail Users- Spending Assumptions	Modelling Assumptions	Data Source
Mountain Bikers		
Local Users – MTB (BOD LGA residents)	Average Spending: \$27 per day	GHD Report for AusCycling - Mountain Biking in Australia: An Economic and Participation Analysis
Regional Users – MTB (Day Visitors)	Average Spending: \$40 per day	MCa assumption
Overnight Visitors <ul style="list-style-type: none"> Internationals Domestic Overnights (Interstate and Intrastate) 	Internationals: ave spend \$158 per night (commercial accommodation) ; ave stay = 2 nights Domestic Overnights: ave spend \$175 per night (commercial accommodation) ; ave stay = 3 nights	LGA Area Profile Break O Day LGA 2019, TRA LGA Area Profile Break O Day LGA 2019, TRA and GHD MTB report
Walkers		
Local Users – MTB (BOD LGA residents)	Average Spending : \$27 per day	Assumed same as MTB (MCa)
Regional Users – MTB (Day Visitors)	Average Spending : \$40 per day	MCa assumption
Overnight Visitors <ul style="list-style-type: none"> Internationals Domestic Overnights (Interstate and Intrastate) 	Internationals: ave spend \$158 per night (commercial accommodation) ; ave stay = 2 nights Domestic Overnights: ave spend \$175 per night (commercial accommodation) ; ave stay = 2 nights	LGA Area Profile Break O Day LGA 2019, TRA LGA Area Profile Break O Day LGA 2019, TRA

Table 25. Table A.2 Measuring Benefits

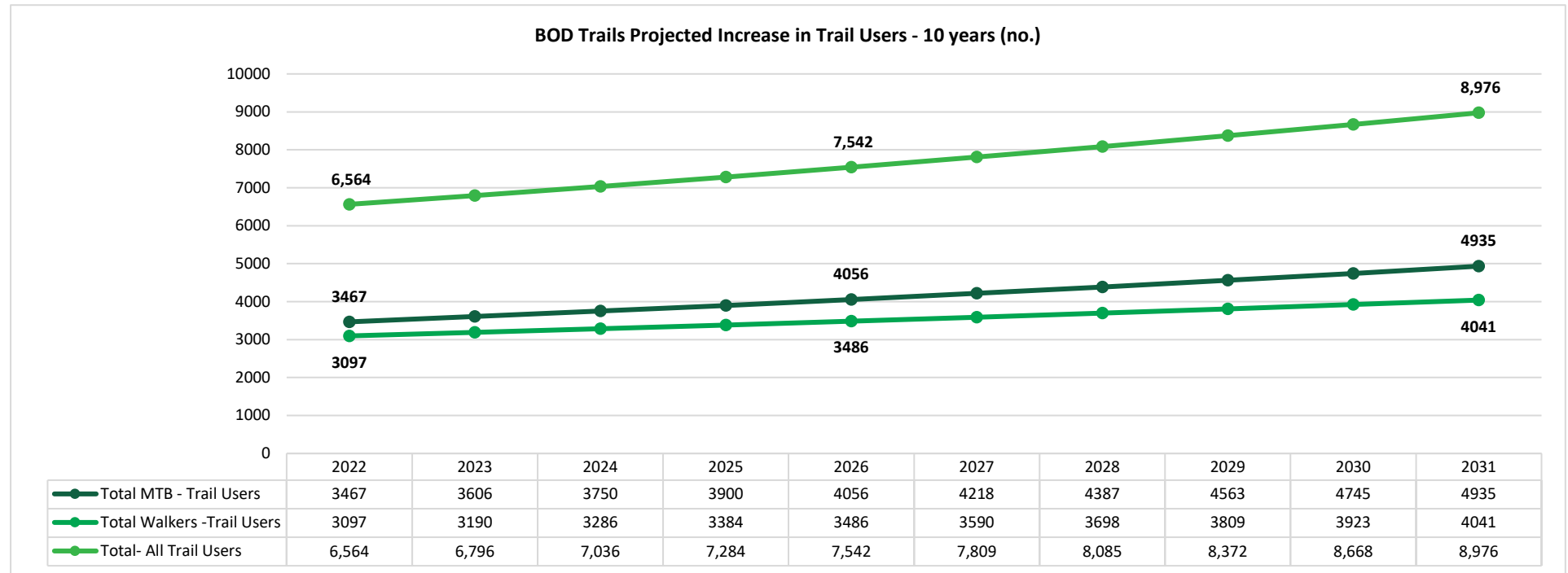
Benefits Measurement	Modelling Assumptions	Data Source
Mountain Bikers and Walkers		
Regional Income	GHD research used for both types of users MCa Regional Economic Model. Income generated by the spending in region by trail users	Users and spending estimates are the input to the model
Health Benefits	Benefits = \$1.58 per km <ul style="list-style-type: none"> MTB: average distance 30 km = \$47 per ride Walk : average distance 18 km = \$28.50 Only estimated for local and regional users.	Mountain Biking in Australia: An Economic and Participation Analysis (AusCycling), GHD Advisory, March 2021
Productivity Benefits	\$7.60 per ride/walk Only estimated for local and regional users	Mountain Biking in Australia: An Economic and Participation Analysis (AusCycling), GHD Advisory, March 2021
Consumer Value	\$26 per trail use – used for MTB and Walkers Estimated for <u>all</u> trail users.	Mountain Biking in Australia: An Economic and Participation Analysis (AusCycling), GHD Advisory, March 2021

Appendix B: Increase in Trail Users

This section shows the annual growth in trail users from the base year (2021) and the estimated benefits associated with this increase. The benefits are measured against costs in the benefit cost analysis.

Figure 32. B.1 Trail Users Increase

The chart shows annual estimates of the increase in trail users with the improvements in the trails and the continued expansion of the market.



Source: MCA Modelling and Analysis March 2022

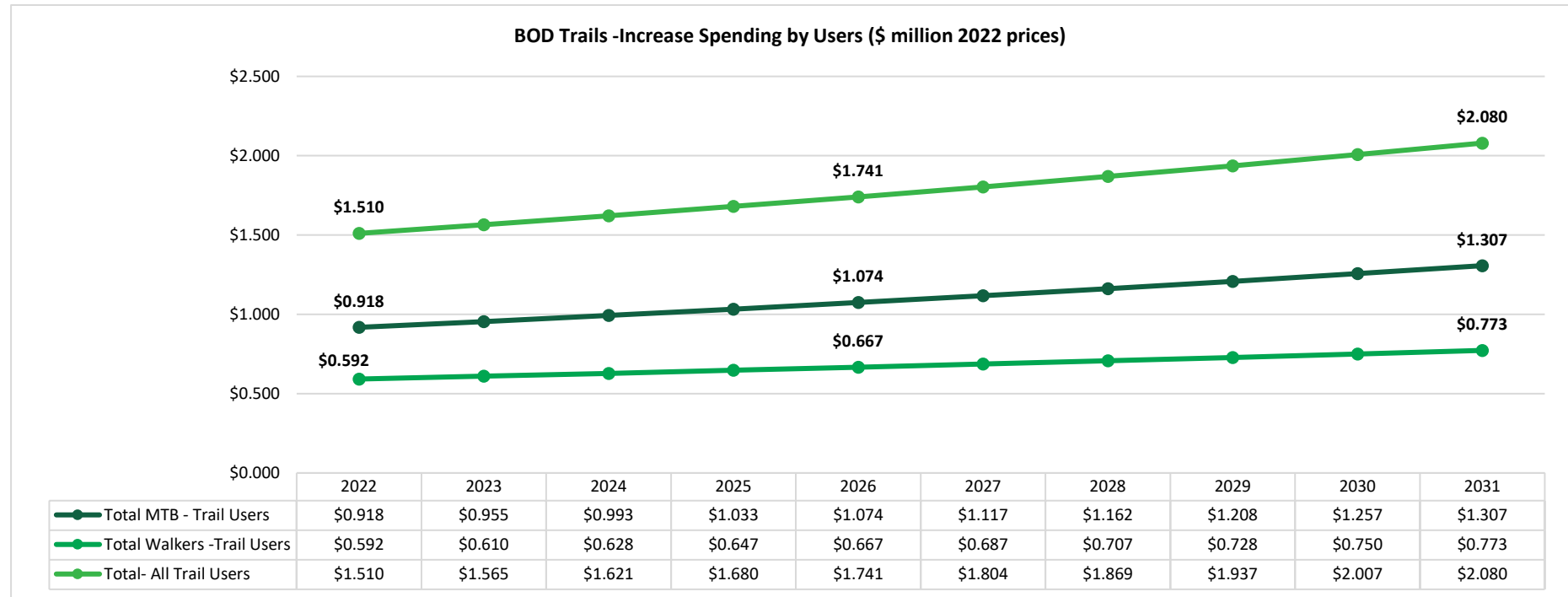
Table 26. Table B.1 Annual Increase in Break O Day Trail Users – 10 Years

Trail Users Projections	Increase on previous year										Total 10yrs
	Y1	Y2	Y3	Y4	Y5	Y6	Y7	Y8	Y9	Y10	
Increase	2022	2023	2024	2025	2026	2027	2028	2029	2030	2031	
Mountain Bikers											
Internationals	155	162	168	175	182	189	197	204	213	221	1865
Domestic Overnight	1524	1585	1649	1715	1783	1855	1929	2006	2086	2170	18303
Domestic Day (regional visitors)	1520	1580	1644	1709	1778	1849	1923	2000	2080	2163	18245
Total Walkers - Visitors	3199	3327	3461	3599	3743	3893	4048	4210	4379	4554	38414
Local Walkers - Break O Day	268	278	290	301	313	326	339	352	366	381	3214
Total MTB - Trail Users	3467	3606	3750	3900	4056	4218	4387	4563	4745	4935	41627
Walkers											
Internationals	143	147	152	156	161	166	171	176	181	186	1638
Domestic Overnight	1402	1444	1487	1532	1578	1625	1674	1724	1776	1829	16070
Domestic Day (regional visitors)	1118	1151	1186	1222	1258	1296	1335	1375	1416	1459	12816
Total Walkers - Visitors	2663	2743	2825	2910	2997	3087	3179	3275	3373	3474	30524
Local Walkers - Break O Day	434	447	461	475	489	504	519	534	550	567	4981
Total Walkers -Trail Users	3097	3190	3286	3384	3486	3590	3698	3809	3923	4041	35505
Total All Trail Users											
Internationals	298	309	320	331	343	355	367	380	394	408	3,503
Domestic Overnight	2,926	3,029	3,136	3,247	3,361	3,480	3,603	3,730	3,862	3,999	34,373
Domestic Day (regional visitors)	2,638	2,732	2,830	2,931	3,036	3,145	3,258	3,375	3,496	3,622	31,061
Total Walkers - Visitors	5,862	6,070	6,285	6,509	6,740	6,979	7,228	7,485	7,752	8,028	68,938
Local Walkers - Break O Day	702	726	750	776	802	829	857	887	917	948	8,194
Total- All Trail Users	6,564	6,796	7,036	7,284	7,542	7,809	8,085	8,372	8,668	8,976	77,132

Source: MCa Modelling and Analysis March 2022

Figure 33. B.2 Increase in Spending

The following are estimates of the annual increase in spending by trail users. These are used in the economic impact modelling, as part of the cost benefit analysis.



Source: MCa Modelling and Analysis March 2022 - May be some differences due to rounding

Table 27. Table B.2 Annual Increase Spending by Break O Day Trail Users – 10 Years

Trail Users Projections	Increase on previous year										
	Y1	Y2	Y3	Y4	Y5	Y6	Y7	Y8	Y9	Y10	
Spending in Region (\$ million 2022 prices)	2022	2023	2024	2025	2026	2027	2028	2029	2030	2031	Total 10yrs
MTB Users											
Internationals	\$0.049	\$0.051	\$0.053	\$0.055	\$0.057	\$0.060	\$0.062	\$0.065	\$0.067	\$0.070	\$0.589
Domestic Overnight	\$0.800	\$0.832	\$0.866	\$0.900	\$0.936	\$0.974	\$1.013	\$1.053	\$1.095	\$1.139	\$9.609
Domestic Day (regional visitors)	\$0.061	\$0.063	\$0.066	\$0.068	\$0.071	\$0.074	\$0.077	\$0.080	\$0.083	\$0.087	\$0.730
Total Walkers - Visitors	\$0.910	\$0.947	\$0.984	\$1.024	\$1.065	\$1.107	\$1.152	\$1.198	\$1.246	\$1.296	\$10.928
Local Walkers - Break O Day	\$0.008	\$0.008	\$0.009	\$0.009	\$0.009	\$0.010	\$0.010	\$0.011	\$0.011	\$0.011	\$0.096
Total MTB - Trail Users	\$0.918	\$0.955	\$0.993	\$1.033	\$1.074	\$1.117	\$1.162	\$1.208	\$1.257	\$1.307	\$11.025
Walkers											
Internationals	\$0.045	\$0.047	\$0.048	\$0.049	\$0.051	\$0.052	\$0.054	\$0.056	\$0.057	\$0.059	\$0.518
Domestic Overnight	\$0.491	\$0.505	\$0.521	\$0.536	\$0.552	\$0.569	\$0.586	\$0.603	\$0.622	\$0.640	\$5.625
Domestic Day (regional visitors)	\$0.045	\$0.046	\$0.047	\$0.049	\$0.050	\$0.052	\$0.053	\$0.055	\$0.057	\$0.058	\$0.513
Total Walkers - Visitors	\$0.581	\$0.598	\$0.616	\$0.634	\$0.653	\$0.673	\$0.693	\$0.714	\$0.735	\$0.757	\$6.655
Local Walkers - Break O Day	\$0.012	\$0.012	\$0.012	\$0.013	\$0.013	\$0.014	\$0.014	\$0.014	\$0.015	\$0.015	\$0.134
Total Walkers -Trail Users	\$0.592	\$0.610	\$0.628	\$0.647	\$0.667	\$0.687	\$0.707	\$0.728	\$0.750	\$0.773	\$6.789
Total All Trail Users											
Internationals	\$0.094	\$0.098	\$0.101	\$0.105	\$0.108	\$0.112	\$0.116	\$0.120	\$0.124	\$0.129	\$1.107
Domestic Overnight	\$1.291	\$1.338	\$1.386	\$1.436	\$1.489	\$1.543	\$1.599	\$1.657	\$1.717	\$1.779	\$15.234
Domestic Day (regional visitors)	\$0.106	\$0.109	\$0.113	\$0.117	\$0.121	\$0.126	\$0.130	\$0.135	\$0.140	\$0.145	\$1.242
Total Walkers - Visitors	\$1.491	\$1.545	\$1.600	\$1.658	\$1.718	\$1.780	\$1.845	\$1.912	\$1.981	\$2.053	\$17.583
Local Walkers - Break O Day	\$0.020	\$0.020	\$0.021	\$0.022	\$0.023	\$0.023	\$0.024	\$0.025	\$0.026	\$0.027	\$0.231
Total- All Trail Users	\$1.510	\$1.565	\$1.621	\$1.680	\$1.741	\$1.804	\$1.869	\$1.937	\$2.007	\$2.080	\$17.814

Source: MCa Modelling and Analysis March 2022 - May be some differences due to rounding

Table 28. B.3 Benefits

The following are the estimated benefits used in the cost benefit analysis.

Table B.3 Estimated Benefits - Break O Day Trail Users – 10 Years (\$ million 2022 prices)

Benefits – Increase in Trail Users (\$ million 2022 prices)	Y1 2022	Y2 2023	Y3 2024	Y4 2025	Y5 2026	Y6 2027	Y7 2028	Y8 2029	Y9 2030	Y10 2031	Total 10 years
MTB Users											
Regional Income Increase	\$0.342	\$0.355	\$0.370	\$0.384	\$0.400	\$0.416	\$0.432	\$0.449	\$0.467	\$0.485	\$4.099
Health Benefits	\$0.085	\$0.088	\$0.092	\$0.095	\$0.099	\$0.103	\$0.107	\$0.111	\$0.116	\$0.121	\$1.017
Productivity Benefits	\$0.014	\$0.014	\$0.015	\$0.015	\$0.016	\$0.017	\$0.017	\$0.018	\$0.019	\$0.019	\$0.163
Consumer Value	\$0.090	\$0.094	\$0.097	\$0.101	\$0.105	\$0.110	\$0.114	\$0.119	\$0.123	\$0.128	\$1.081
Total Benefits -MTB Users	\$0.530	\$0.551	\$0.573	\$0.596	\$0.620	\$0.645	\$0.670	\$0.697	\$0.725	\$0.754	\$6.361
Walkers											
Regional Income Increase	\$0.201	\$0.207	\$0.215	\$0.222	\$0.228	\$0.235	\$0.242	\$0.249	\$0.257	\$0.264	\$2.321
Health Benefits	\$0.044	\$0.054	\$0.056	\$0.057	\$0.059	\$0.061	\$0.063	\$0.064	\$0.066	\$0.068	\$0.592
Productivity Benefits	\$0.012	\$0.012	\$0.013	\$0.013	\$0.013	\$0.014	\$0.014	\$0.014	\$0.015	\$0.015	\$0.135
Consumer Value	\$0.080	\$0.083	\$0.085	\$0.088	\$0.091	\$0.093	\$0.096	\$0.099	\$0.102	\$0.105	\$0.922
Total Benefits -Walkers	\$0.337	\$0.356	\$0.369	\$0.380	\$0.391	\$0.403	\$0.415	\$0.427	\$0.440	\$0.453	\$3.971
Total All Users											
Regional Income Increase	\$0.542	\$0.562	\$0.585	\$0.606	\$0.628	\$0.651	\$0.674	\$0.699	\$0.724	\$0.750	\$6.420
Health Benefits	\$0.129	\$0.142	\$0.147	\$0.153	\$0.158	\$0.164	\$0.170	\$0.176	\$0.182	\$0.189	\$1.609
Productivity Benefits	\$0.025	\$0.026	\$0.027	\$0.028	\$0.029	\$0.030	\$0.031	\$0.032	\$0.033	\$0.035	\$0.298
Consumer Value	\$0.171	\$0.177	\$0.183	\$0.189	\$0.196	\$0.203	\$0.210	\$0.217	\$0.225	\$0.233	\$2.004
Total Benefits -All Users	\$0.867	\$0.907	\$0.942	\$0.976	\$1.011	\$1.048	\$1.085	\$1.124	\$1.165	\$1.207	\$10.332

Source: MCa Modelling and Analysis March 2022 - May be some differences due to rounding

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