



# D'Aguilar National Park Mountain Bike Trail Concept Plan



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## Executive Summary

The purpose of this concept plan is to explore the potential for development of an internationally significant MTB trail network within D'Aguilar National Park.

The aim of the project would be to invigorate the tourism industry in the Brisbane region, particularly in the cooler 6-8 months of the year, traditionally the shoulder and off seasons for existing SEQ tourism activities. Tourism is one of the key areas of economic growth for the region, as identified in both MBRC's [Regional Economic Development Strategy](#) and BCC's [Brisbane Region Visitor Economy 2031 Vision](#). The infrastructure in the Brisbane Region is here – second runway, new international cruise terminal, 20,000+ hotel rooms etc - **but the experiences are missing**. The key KPIs that all levels of government are working towards are jobs, extended stay and increased spend.

This project would play an important role in assisting the tourism sector's recovery post COVID. Additionally, with the Brisbane Olympics 2032 on the horizon, and the exposure this will bring, this project would provide the opportunity to have a highly marketable adventure tourism icon directly on Brisbane's doorstep, helping to create more overnight stays that would otherwise gravitate to the Gold or Sunshine Coasts. Furthermore, hallmark mountain bike events feed millions of dollars into local and state economies – Brisbane is missing out.

The social and health benefits of mountain biking are undeniable; it gets participants closer to nature, keeps them fit, healthy and active, improves mental health and reduces their burden on the health system in the long term. MTB provides the opportunity for children to reduce screen time and spend more time outdoors, decreasing the risk of childhood obesity – all important objectives of the [Activate! Queensland](#) sport and rec strategy.

The past five years has seen exponential growth in destination-focused mountain bike trail development across Australia. Developments such as Blue Derby, Maydena Bike Park and Thredbo Resort are bringing tens of thousands of visiting riders to mountain bike destinations each year and delivering tens of millions of dollars in annual economic impact. During this period, trail design and construction, along with bike technology advancements has fed a rapidly evolving mountain bike market, which has significantly changed rider behaviours.

Over the past several years, the sport of mountain bike riding has continued to experience exponential growth across the world; including significant growth in mountain bike tourism across Australia. Despite this growth, formal mountain bike infrastructure development has failed to keep up, resulting in many local riders turning to informal trail development as a way of accessing the volume and style of trails they wish to ride close to their home. When compared to other states, Queensland has a very limited mountain bike destination market.

## Key Objectives

The D’Aguilar National Park Mountain Bike Trail Plan would propose to achieve the following objectives which closely align with **Queensland Government Department of Tourism, Innovation and Sport’s vision and objectives**

**Enrich the lives of Queenslanders by maximising our visitor and innovation economies and supporting healthy and active lifestyles**

- *Enrich Queenslanders’ way of life by delivering health and social outcomes through sport and active recreation opportunities*
- *Drive economic recovery and growth by attracting and amplifying tourism and innovation in investment to sustain and create Queensland jobs.*
- *Maximise benefits of tourism, major events and sport and active recreation experiences to realise Queensland’s economic potential.*
- *Create a diverse, productive and sustainable economy for a fairer Queensland*

- 1. Cater to the wants and needs of local riders**
- 2. Maximise visitation potential across a range of rider markets**
- 3. Maximise economic development and local business opportunities**
- 4. Construct a network of environmentally sustainable trails using world class benchmarks**
- 5. Create long term, positive environmental outcomes by introducing so many more people to these natural environments**

Over 54% of QLD households have at least one bicycle

Over 500,000 Brisbane residence have a touch point with riding since COVID

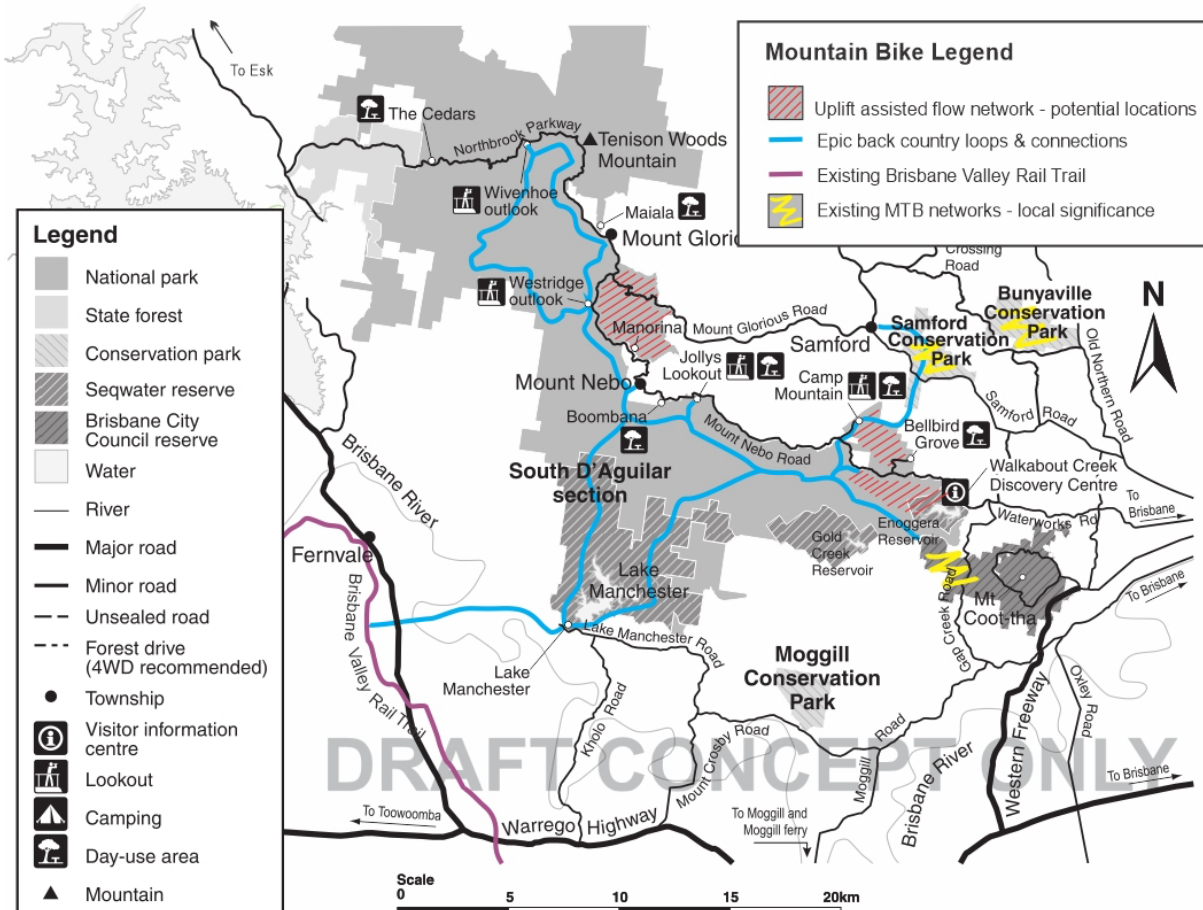
Brisbane bike retail increasing with new bike shops open in the past 12 months

Bike sales up 500% in response to COVID-19

# The Proposed Network

The proposed trail network is largely within the confines of D’Aguilar National Park and seeks to utilise over 400m of vertical elevation opportunity, with iconic views out to Moreton Bay. A large network of proposed trails will cater for riders of all abilities, through a 150km+ world-class trail network of genuine significance.

## D’Aguilar National Park map



Please note the trail lines marked on the map above are conceptual only.

### The Primary network – uplift assisted\* flow trails

The flagship of the network could potentially capitalise on the spectacular topography at the very western end of the Samford Valley, within the National park, below Mt Nebo. These trails would be located in the 2 blocks of the National Park split by Mt Glorious Rd running through the centre. The southern section is bordered by The Goat Track, Mt Nebo Rd and Mt Glorious Rd, while the northern section is bordered by Mt Nebo Rd, Mt Glorious Rd and Harland Rd.

Camp Mountain down to Bellbird Grove is another option for uplift assisted flow trails, with 300m of vertical elevation and existing paved shuttle roads. Additionally, a further option is

the area from McAfee's Lookout down to Walkabout Creek, with 200m of vertical elevation and direct shuttle access on Mt Nebo Rd.

*\*Uplift by commercial operators using vans with trailers*

### Epic back country loops

In addition to this primary uplift network, the concept includes at least 2 epic back country loops; half to full day rides that would connect to the towns of Mt Nebo Village and Mt Glorious Village.

### Logical connections to existing networks

Adding value to the new network, further back country trails would connect to both the Gap Creek Trail Network at Mt Coot-tha Forest Park (identified in the recent Brisbane City Council Brisbane Off Road Cycling Draft Strategy as a primary target for further trail development) and the Ironbark MTB network at Samford Conservation Park.

Additionally, a link west from the primary network would descend more than 400 vertical metres down to the town of Fernvale, connecting to the Brisbane Valley Rail Trail (BVRT). The BVRT is Australia's longest rail trail and since inception has become a key driver of tourism for the Brisbane Valley.

### Trail Towns

Trail towns are towns connected to the network that provide a significant part of the overall experience for riders. Trail towns are typically smaller towns that offer food, beverage & accommodation options for riders.

A trail connection to Samford (and its existing infrastructure) would earmark it as the primary 'trail town' for the project.

Additionally, connections to Mt Glorious Village, Mt Nebo village and Fernvale would see economic benefits and opportunities for those towns.

Brisbane, although not directly connected to the network, with its proximity and multitude of food, beverage and accommodation options would also be a primary beneficiary.

*"As our population grows and our backyards shrink, access to open and green space is important for our productivity. It keeps people healthier, connects communities and helps make cities more resilient to the impacts of climate change."*

*Peter Achterstraat AM FCPA, New South Wales Productivity Commissioner*

## Brisbane Off-Road Riders Alliance – Who are we?

The Brisbane Off-Road Riders Alliance (BORRA) is a voice for the mountain biking community of the Brisbane area. We advocate for the protection and maintenance of trails as environmental leaders, focused on sustainability through education and action. BORRA is a not-for-profit Association Incorporated in Queensland with over 500 members and 1500 Facebook followers.

We also believe that Brisbane has a unique opportunity to become a major winter mountain bike tourism destination hub for the South East QLD area - complete with its own nationally significant trail network, complementing the existing network of trails in the Mt Coot-tha area.

### *Our Vision*

*BORRA will work with our partners to advocate for an environmentally sustainable trail network within the City of Brisbane that will provide long term economic, environmental, health and social benefits for the community.*

*BORRA will create a legacy for the Brisbane Community that puts our trails on the world map as an example of what can be achieved when a vibrant local community engages with official stakeholders to balance a rapidly growing sport with eco-tourism and sustainable greenspace utilisation.*

Researching other national mountain bike park initiatives, it is clear that the success of the project is contingent on key stakeholder cooperation and support – State Government, Local Government and Land Management – Queensland Parks and Wildlife Service and SEQ Water. With this in mind over the past two years we have begun working with:

### State Government

Dept of Innovation & Tourism Industry Development – consulted for advice and guidance

Dept of Sport and Recreation – consulted for advice and guidance

## The Local Area Councils

### Brisbane City Council (BCC) & Brisbane Economic Development Agency (BEDA)

After meetings with the Lord Mayor, Deputy Lord Mayor (who is also chair of the Tourism Development Committee) and BEDA, BCC are keen to progress to the next step and have requested quotes for a feasibility study. BCC's attitude to off road cycling is at a pivotal point with the recent release of their Brisbane Off-Road Cycling Draft Strategy (BORC).

### Moreton Bay Regional Council (MBRC) & Moreton Bay Region Industry & Tourism (MBRIT)

We've had several meetings since January with a team from MBRC and MBRIT. They have recently released their Regional Economic Development Strategy (REDS) which identifies tourism as one of the four main pillars for economic growth in their region over the next 20 years. Their tourism strategy has a particular emphasis on the hinterland, so our concept fits quite neatly.

### Somerset Regional Council (SRC)

SRC has a history of bicycle related tourism with the Brisbane Valley Rail Trail and the recent purchase of a mountain behind Esk designated for recreational cycling use. They are very interested in exploring the concept, particularly if it includes a link from D'Aguilar National Park down to the BVRT at Fernvale.

## Peak Bodies

### AusCycling (Australia's peak body for cycling)

BORRA have signed a Memorandum of Understanding with AusCycling and various cycling industry identities, to work together to develop a plan to make the Brisbane region a world class mountain bike destination.



## The Mountain Bike Market

Mountain biking has been established in Australia since the early 90's but really began to prosper in the late 90's. The early 2000's saw some of Australia's first purpose-built mountain bike infrastructure, namely Mt Stromlo in Canberra.

The current mountain bike market is dominated by longer travel, dual suspension mountain bikes, broadly referred to as all-mountain, trail, or enduro bicycles. This style of bike is incredibly capable at both climbing and descending and has effectively increased the capability of the average rider.

Currently riders are seeking a broad range of experiences from local urban trails through to remote wilderness style longer distance riding experiences.

Generally speaking, the mountain bike tourist market is seeking these destinations and adventure experiences in more natural environments, with the option of shuttle assisted uplift, longer distance loops or point-to-point trails, while still having the convenience and amenities of a 'trail town' for post ride activities.

Research indicates that the current demographic of riders is predominately male, with an age of 25-45 years and a high disposable income. This market is a key target for tourism as they are seeking longer, destination-based stays and typically seek out high quality dining and accommodation options. With the recent growth in e-bikes, more female riders are entering the sport as well as older demographics now able to continue to ride. These trends are broadening the tourism reach even further.

Mountain biking is a rapidly growing recreational, sport and tourism activity across Queensland, Australia and globally (Research and Markets, 2017). The existing mountain bike trails and facilities in Queensland have been developed through decades of commitment from volunteers and land managers and provide a range of experiences. However, rapid growth and changing market trends are demanding greater diversity in mountain biking experiences, and the current facilities are insufficient to meet these needs.

## Mountain Bike Tourism

Tourists engaging in mountain biking can be divided into two distinct categories, the 'complementary market'; those who engage in mountain biking as a complementary activity (not as a primary motivator or sole purpose for travel), and the 'enthusiast market', those who have travelled with mountain biking being the primary or sole reason for their trip.

### Complementary tourist market

Mountain bike riding as a complementary activity has risen dramatically in popularity in recent years, as the sport has moved beyond the 'extreme sport' image of the past, and more towards the accurate perception of the sport as a safe, inclusive and fun 'adventure' activity.

Complementary visitation is a key component of a successful government-backed mountain bike destination as it allows the capture of a much larger target audience, and promotes longer stays, and increased travel party size. Complementary tourists include valuable family markets, who will often stay longer and spend more than solo and small group tourists.

The emergence of mountain biking as a commercially viable complementary activity has been driven largely through the development of safer, more beginner-friendly trails, and by the growing number of commercial operators including the sport in their activity programs. As a complementary activity, mountain biking offers genuine avenues for commercial return, while also potentially lengthening the duration of stay for existing guests. In addition to this, targeted marketing may draw in guests that may otherwise have travelled to an alternative location.

The D'Aguiar project has strong potential to attract complementary visitor markets, with significant general tourism already established on the Gold & Sunshine Coasts. Capitalising on this market will require development of a network of very accessible, fun trails, which strongly leverage the views and local environments.

### Enthusiast tourist market

The enthusiast market is defined as mountain bike tourists for whom mountain biking is the primary motivator/purpose for their travel. The enthusiast market seeks out new and exciting mountain bike destinations, and typically travel multiple times annually to engage in mountain biking. The mountain bike enthusiast market is typically populated by 25-45-year-old males with a high disposable income, who are seeking opportunities to travel to destinations with the primary purpose of going mountain bike riding.

While mountain bike riding may be the primary travel motivator, the availability of alternative activities will still influence this traveller as they will often look for destinations where they can viably travel with family, their spouse or non-enthusiast travelling companion(s).

The mountain bike enthusiast is typically travelling for multi-day stays and is seeking unique and high-quality trail experiences. These users will typically seek higher volumes of trail, as they will often ride 30-40km+ per day, with a primary focus on 'uplift' accessed descending trails.

The D'Aguilar project has strong potential to attract the enthusiast rider market, with limited high-quality options located in the northern regions of Australia making the destination very appealing for riders during the ideal cooler months, when it's not a viable option to ride in the cold and wet of the southern states or New Zealand.

## The Queensland Mountain Bike Market

Queensland currently has limited destination mountain bike infrastructure development.

The South East of Queensland is one of the largest continuous urban developments in Australia, housing a population of approximately 3.6 million people. Despite this large and growing population base, the development of high-quality riding destinations servicing this intrastate market remains minimal.

*Population growth is set to continue with average projected growth 1.3% - compounding over next 10 years is 13.6% growth which would appear conservative given these statistics do not factor in COVID and Olympic impact. Current Median age 35.7*

*Source: ABS 3218.0, Regional Population Growth, Australia*

When looking to a potential audience outside of Queensland, SEQ has a number of appealing attributes for the visiting rider, including but not limited to;

- Ideal riding temperature and low rainfall during the 6-8 cooler months of the year
- Proximity to major population areas (ease of access on eastern seaboard)
- Mountainous areas

In 2018 a mountain bike strategy for the state of Queensland was developed for the Queensland Government by Common Ground Trails, contracted by Mountain Bike Australia (MTBA). The Brisbane Region was identified as one of the high priority regions for a significant investment in new mountain bike trail networks. The report made recommendations and an implementation methodology. It is unclear why these recommendations were not acted up.

## Economic Impact

In 2021 AusCycling released [Mountain Biking in Australia: An Economic and Participation Analysis](#) which coupled with Mountain Biking State of Play Report, SportAus (2020) give some guidance as to the economic potential of mountain biking. Australian participation rates as a % of total population is lagging behind international standards.

	Participation Rate % population
Internationally	4 -6%
New Zealand	7%
Australia (AusPlay data)	1.6%

Based on this – Queensland mountain bikers would be around 83,000. The economic impact of this group was estimated:

### Queensland Riders<sup>1</sup>

Impact	Output \$M	Valued Add \$M	Wages and Salaries \$M	Employment FTE
Direct	152	86	5	1,008
Indirect Type 1	82	37	19	186
Indirect Type 2	107	56	24	282
<b>Total</b>	<b>341</b>	<b>179</b>	<b>48</b>	<b>1,476</b>

To put these figures into context, the Queensland Gross State Product (GSP) is estimated at \$369.578 billion (Queensland represents 19% of Australia’s GDP). So, output from mountain biking is not a huge number when compared to the GSP, however it does indicate the opportunity for significant economic return on any funds invested in this area.

Specifically, the three industries this economic action would support:

1. Retail trade
2. Accommodation and food service professional
3. Scientific and technical service industries

<sup>1</sup> Direct impacts = operational expenditure on goods and services

Indirect (flow on) + the second and subsequent round effects of increased level of purchases by suppliers in response to increase sales

- Supply chain effects (type 1) – production induced support activities
- Consumption effects (type 2) – additional expenditure due to additional wages

All area identified by the Queensland Government as productivity growth areas for the state.

The AusCycling report went further and looked at average expenditure of mountain bikers,

Average expenditure	Mountain bike riders
Expenditure per ride	\$27.10
Annual expenditure per mtb rider	\$2,282
Annual expenditure - larger items (new bike, services, equipment and spares, PPE)	\$4,922
Expenditure on intrastate mtb holidays per trip	\$1,707
Expenditure on interstate mtb holidays per trip	\$2,485

## Social Values of Mountain Biking

The QSFR Skills Alliance (2019) looked at the Social and Health Impacts of Sport and Active Recreation in Queensland. This table summarised the finding made by Adept Economics.

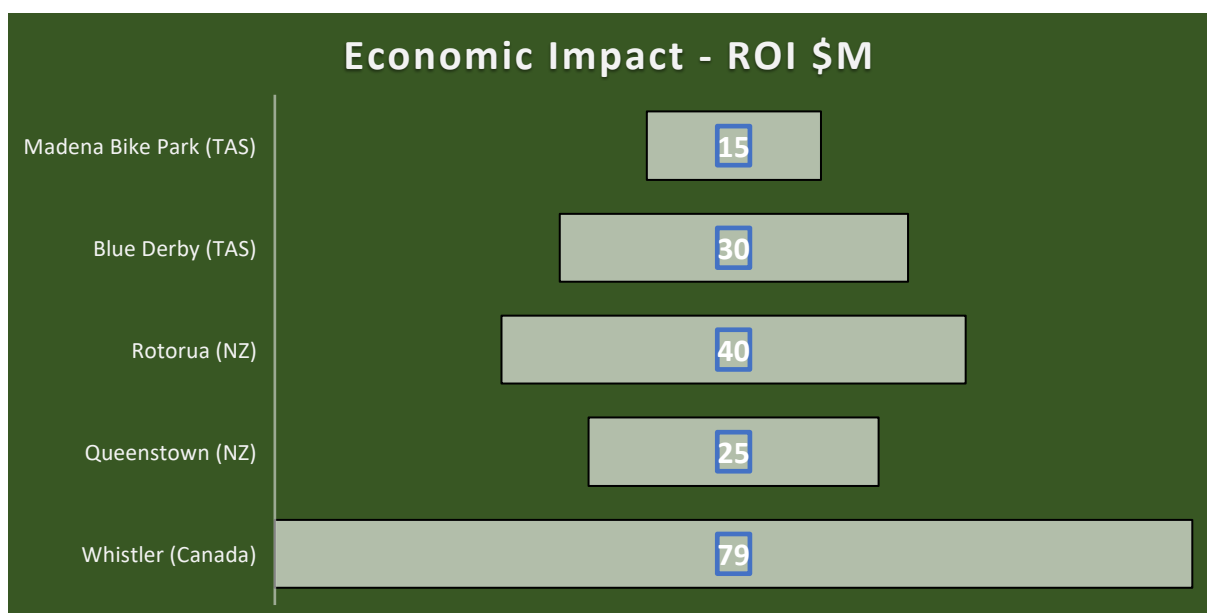
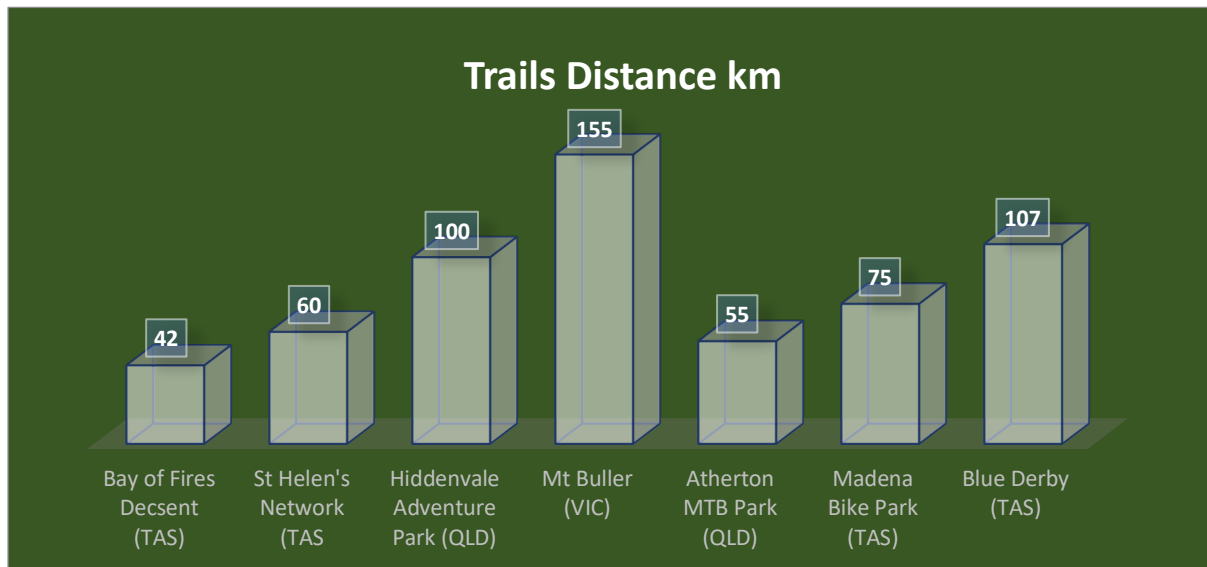
Social Benefit	Overview Benefit	Estimated Annual Benefit	Estimated Benefit per ride
Health Benefits	The personal and health system benefits due to healthier, active individuals	-	\$1.58 per km ridden
Productivity Benefits	Improved workplace productivity through decreased absenteeism and presenteeism	\$767	\$7.59 per ride
Human Capital Uplift	Positive association between sport and physical recreation and educational outcomes	\$252	\$2.50 per ride
Consumer Surplus	The satisfaction people derive from participating in sport and active recreation	\$2,624	\$25.98 per ride
Criminal and Social Justice benefit	Benefits from decreased crime rates due to increased engagement from sport and recreation	\$79	\$0.78 per ride
Civic/ volunteering benefit	The value people place on volunteering and enjoying sport and recreation activities	\$3,214 per volunteer	

Queensland is currently lacking high-quality, destination-focused developments, providing a key opportunity to capture regional, state, national and international rider visitation. We believe the economic, social and health benefit to Queensland would be significant.

**Now is the time to act!**

## Appendix - Case Studies

Mountain bike destination development is a proven driver of economic activity across Australia, with a number of successful destinations now demonstrating that the development of trails can stimulate economies. Destinations such as Blue Derby in Tasmania have brought tens of thousands of visitors to regional communities, establishing dozens of new jobs and a wide variety of new businesses. The mountain bike traveller typically seeks an average 7-day holiday and will spend more than the average traveller.



## Blue Derby

Established in 2020 with an initial 20km of trails. Now with over 120km of trails, the destination reportedly sees visitation of over 40,000 riders per annum. Since the trail opening, the town has seen the development of multiple new restaurants and cafes, and a number of new accommodation venues have been constructed. Widely recognised as Australia's leading trail centre, the Blue Derby trails projects has transformed the ex tin mining town into a thriving tourist centre.

## Maydena Bike Park

Australia's largest gravity-focused bike park, with 820m vertical elevation and 60+ trails. The park is privately owned and is operated as a pay-for-use facility with an uplift shuttle service. The park has hosted 25,000 uplift days and brought an estimate total 30,000 visitors to the town in its first year of operation. With a broadening focus towards trail-based riding and beginner friendly trails, visitation at the park is likely to increase significantly through later years. In operation for two years, the development of the park has seen property prices in town raise by 100-200%, and the development of two new restaurants and a number of accommodation ventures. This month it is hosting the Australian Mountain Bike National Championships.

## Mount Buller (Victoria)

Invested over \$2m over a four-year period in developing predominantly all-mountain and cross-country mountain bike trails. Data for the resort (as of June 2014) recorded a total rider count of 40,000 - 50,000 visitors over a nine-month period.

## Overseas experience

On the North Island of New Zealand, Rotorua is widely recognised as one of the world's leading trail centres. A largely community-driven trail network, the trails are located predominantly in pine plantation area. While the town of Rotorua has a strong broader tourism industry, mountain biking is a major component of the visitor economy, with an estimated 230,000 annual rider visits, direct employment of 339 FTE and an annual ROI of \$47M.

The South Island of New Zealand with Queenstown trail network and now the opening of [The Old Ghost Road](#) and [Paparoa](#) has also augmented visitor numbers with the investment in mountain biking. Annual visitor numbers at 150,000 and growing, employment at 250 direct FTE and annual ROI \$25M.



# References

## QUEENSLAND

[Activate! Queensland 2019 - 2029](#)

[Mountain Biking in Australia: An Economic and Participation Analysis](#)

[Strategic Plan 2020-2024 Department of Tourism, Innovation and Sport](#)

[The Moreton Bay Region Regional Economic Development Strategy](#)

[Visitor Economy 2031 – Vision for the Brisbane Region September 2019](#)

[Queensland Government Cycling Strategy – Department of Transport and Main Roads](#)

[Queensland Government Cycling Action Plan – Department of Transport and Main Roads](#)

[Queensland Mountain Bike Strategy Implementation Plan – Department of National Parks, Sport and Racing, Sport and Recreation Planning](#)

[Toowoomba and Lockyer Valley Escarpment Mountain Bike Master Plan – Toowoomba Regional Council and Lockyer Valley Regional Council](#)

[Mackay Region Mountain Bike Strategy – Mackay Regional Council](#)

[Outdoor Recreational Plan for Moreton Bay – Moreton Bay Regional Council](#)

[Tropical North Queensland Regional Mountain Bike Strategy – part 1 – Far North Queensland Regional Organisation of Councils](#)

[Tropical North Queensland Regional Mountain Bike Strategy - part 2 - Far North Queensland Regional Organisation of Councils](#)

## NEW SOUTH WALES

[Sustainable Mountain Bike Strategy Paper for New South Wales – Office of Environment and Heritage](#)

[Draft Strategy for mountain bike trail network on the Illawara escarpment](#)

[Public Exhibition Report into a Mountain Bike Strategy for the Illawara Escarpment](#)

## TASMANIA

[Georgetown in Tasmania Mountain Bike Feasibility Study – Georgetown Council](#)

[Georgetown in Tasmania Economic Study – Georgetown Council](#)

[Blue Derby Tasmania – Regional Development Australia](#)

[Blue Derby Tasmania Mountain Bike Trails Stage 2 – Break of Day Council](#)

[St Helens Tasmania Mountain Bike Trails – Australian Government, Tasmanian Government, Break O’Day Council](#)

[ABC report, Video on Derby in Tasmania – A MUST watch](#)

## VICTORIA

[Warburton Mountain Bike Destination Economic Impact Assessment – Yarra Ranges Council](#)

[Guidelines for Trail Planning, Design and Management – Regional Development Australia, Regional Development Victoria and Parks Victoria](#)

## WEST AUSTRALIA

[South West Mountain Bike Master Plan – WestCycle Inc](#)

## NEW ZEALAND

[Economic Impact Study of Mountain Biking in Whakarewarewa Forest Rotorua New Zealand – Rotorua Lakes Council](#)

[Makara Peak, Wellington NZ - A MUST watch](#)