



Nannup Trails Hub

Gaps, Constraints and Opportunity Assessment

Report prepared for

Shire of Nannup

September 2020



lucid

/ˈluːsɪd/

adjective

1. expressed clearly; easy to understand

2. bright or luminous



Document Control

Job Name: NANNUP Trails Hub Business Case

Client: Shire of Nannup

Client Contact: Nicole Botica

Version Control

Version	Date	Authorisation
Draft v1	17/9/2020	MC
Draft v2	25/9/2020	MC

Disclaimer:

While every effort has been made to ensure the accuracy of this document, Lucid Economics Pty Ltd is unable to make any warranties in relation to the information contained herein. Lucid Economics Pty Ltd, its employees and agents accept no liability for any loss or damage that may be suffered as a result of reliance on this information, whether or not there has been any error, omission or negligence on the part of Lucid Economics Pty Ltd, its employees or agents. Any forecasts or projections used in the analysis and relied upon for any findings can be affected by a number of unforeseen or unknown variables, and as such no warranty is given that a particular set of results will in fact be achieved or realised.

Executive Summary

Introduction & Background

Lucid Economics Pty Ltd (Lucid Economics) has been engaged by the Shire of Nannup to develop a business case for Nannup to become a Trails Hub. A Trails Hub can be defined as a town or destination that is widely known for high quality trails as well as has a high level of trail-user-related services and facilities, which would include accommodation, restaurants, cafes, bespoke retail shops and other services catering for trail users.

Gaps and Opportunities

This assessment has identified numerous successful case studies of trails hubs in Australia. All of these towns have considerable tourism oriented infrastructure including range of accommodation, restaurants, cafes and numerous bespoke services catering towards trail participants (usually cycling or mountain biking). Furthermore, all of these areas have considerable visitation and tourism provides an important boost to the local economy.

In the context of Blue Derby, the delivery of mountain biking trails created demand for visitation and as visitation grew, the private sector responded and invested in accommodation and a range of visitor services, including many that cater specifically for mountain bike riders. This example demonstrates that public sector investment into (common user) trail infrastructure can drive demand, creating a critical mass and encouraging private sector investment into visitor infrastructure such as accommodation, restaurants, cafes, etc.

There is strong local support from stakeholders in town for Nannup to become a trails hub. Based on the benchmarking assessment and stakeholder engagement, the following gaps (and future opportunities) have been identified:

- The development of new short-stay accommodation, which could include:
 - A new 3 to 4 star motel/hotel with a restaurant and conference facilities
 - Expansion of the Nannup Caravan Park to include more tiny homes/cabins
 - New self-contained cabins/tiny homes (8-12 units)
 - New holiday park (mostly cabins with some powered sites as well as main facilities – i.e. restaurant/café/bar, playground, etc.)
- Redevelopment of the Nannup Hotel
- Provision of pop-up cafés or other form of mobile food or beverage provision
- Development of bespoke bicycle support service (i.e. repair, maintenance, sales), possibly as a pop-up in the short-term
- A shuttle service to various trails
- More boutique food and beverage offering (i.e. wine bar, tapas bar, chocolate shop, gourmet local foods shop, etc.)
- Other non-cycling related services
 - A supermarket with longer opening hours and expanded offering
 - A contract cleaning service

Combined, these opportunities would support Nannup becoming a trails town (together with further trails development to drive demand). In terms of future accommodation development, a number of sites have been identified for future consideration.

Project Prioritisation

The Nannup Cycle Master Plan has identified 31 individual priority projects to support future cycling activities in and around Nannup (including mountain biking, road cycling and gravel cycling). This assessment has identified the following projects to pursue over the short-term (next 3-5 years):

- Freestyle Jump Park
- Southern Traffic Bridge
- Tank 1 and Tank 5
- Principle Trailhead
- Adventure Trail Link Nannup to Donnelly
- Signage, Branding and Mapping for Gravel Routes
- Signage for Road Cycling Routes

While some projects did not score well in the evaluation, it was often due to either a significant time requirement, a planning constraint and/or a high level of capital expenditure that would be required. In some cases, there projects could deliver considerable benefit over time. While they should not be pursued over the short-term (next 3-5 years) for development, there are actions that can be undertaken to explore these projects further.

- **Trees to Seas (Nannup to Margaret River):** given the future potential significance, this project should be investigated (together with the Shire of Augusta-Margaret River and other stakeholders) and initial inquiries made into land tenure and potential environmental constraints. This trail could be instrumental in encouraging a range of trail users, including horse riding.
- **Raubon – Tutunup Rail Trail (Nannup to Busselton):** given the future potential benefits, investigations should be undertaken with DBCA and various landowners around this concept to see if the sensitive environmental values can be protected and this constraint overcome.
- **Shoulder Widening for Road Cycling:** the Shire cannot pursue these projects directly but should lobby Main Roads to undertake this work. As the popularity of Nannup grows and more visitors are attracted to the area, safety concerns will increase.
- **Donnelly Trail Hub MTB Network:** the area is designated as a public drinking water source area (PDWSA), which presents considerable constraints. However, there are existing trails in this area and the development of this network could link back to Nannup and provide access to the Donnelly River Village (for accommodation, food and retail). The Shire should discuss these future possibilities with DBCA and Water Corporation.

Recommendations

Based on the research, analysis and consultation conducted for this project, the following recommendations are provided:

- The Shire of Nannup should pursue a business case for the above identified priority projects over the next 3-5 years
- The Shire of Nannup should pursue the identified priority action in order to progress various projects over the medium to long term
- The Shire of Nannup should pursue a pro-active investment attraction campaign seeking to:
 - Raise the profile of Nannup as a visitor destination (for trails)
 - Promote the current (and future) private sector investment opportunities into trail infrastructure and the resultant increase in visitation
 - Promote the diverse range of sites identified for future accommodation development
- The Shire of Nannup should continue to work with the Department of Biodiversity, Conservation and Attractions (DBCA) regarding various recommendations of the Nannup Cycle Master Plan and the Warren-Blackwood 2050 Cycle Plan
- The Shire of Nannup should consider future expansion of the Caravan Park (to provide a greater mix of cabins/tiny home)
- The Shire of Nannup should engage with the owner of the Nannup Hotel regarding potential for future redevelopment
- The Shire of Nannup should pursue the potential for land swaps to gain control of key accommodation development sites
 - If successful, the Shire should pursue an EOI process for future tourism development aligned to the Trails Hub concept

Table of Contents

Executive Summary.....	ii
Table of Contents.....	v
1. Introduction.....	1
2. Tourism Trends	2
3. Case Study Analysis.....	5
4. Benchmarking	7
5. Stakeholder Engagement.....	9
5.1 Engagement Process and Stakeholders	9
5.2 Summary of Stakeholder Engagement	9
5.2.1 Trails Hub Concept	9
5.2.2 Issues and Challenges.....	10
5.2.3 Business Opportunities	12
6. Gaps and Opportunities.....	13
6.1 Priority Opportunities.....	13
6.2 Site Selection	13
7. Project Prioritisation	18
7.1 Priority Projects and Evaluation Framework	18
7.2 Project Prioritisation.....	19
7.3 Additional Priority Actions.....	22
8. Recommendations	23
References.....	24
Appendix A: Detailed Case Studies	25

1. Introduction

Lucid Economics Pty Ltd (Lucid Economics) has been engaged by the Shire of Nannup to develop a business case for Nannup to become a Trails Hub. A Trails Hub can be defined as a town or destination that is widely known for its trails as well as has a high level of trail-user-related services and facilities. The concept goes far beyond just the physical environment and the quality of the trails. It extends to the overall experience that a visitor can enjoy, which means that local accommodation, food and beverage outlets, retail shops, etc. are all oriented toward the trail user.

In the context of Nannup, the Trails Hub concept combined not just mountain biking, but road cycling, hiking/trekking, canoeing, horse riding as well as other types of trails, such as 'food trails'. Before a business case can be developed, it is important to identify the existing gaps and constraints in Nannup that may prevent it from becoming a Trails Hub as well as what business and investment opportunities will be needed to support increased levels of visitation in the future.

This process to identify gaps, constraints and opportunities has included a detailed analysis of existing tourism trends, case study analysis and benchmarking with other established locations as well as detailed engagement with a variety of stakeholders.

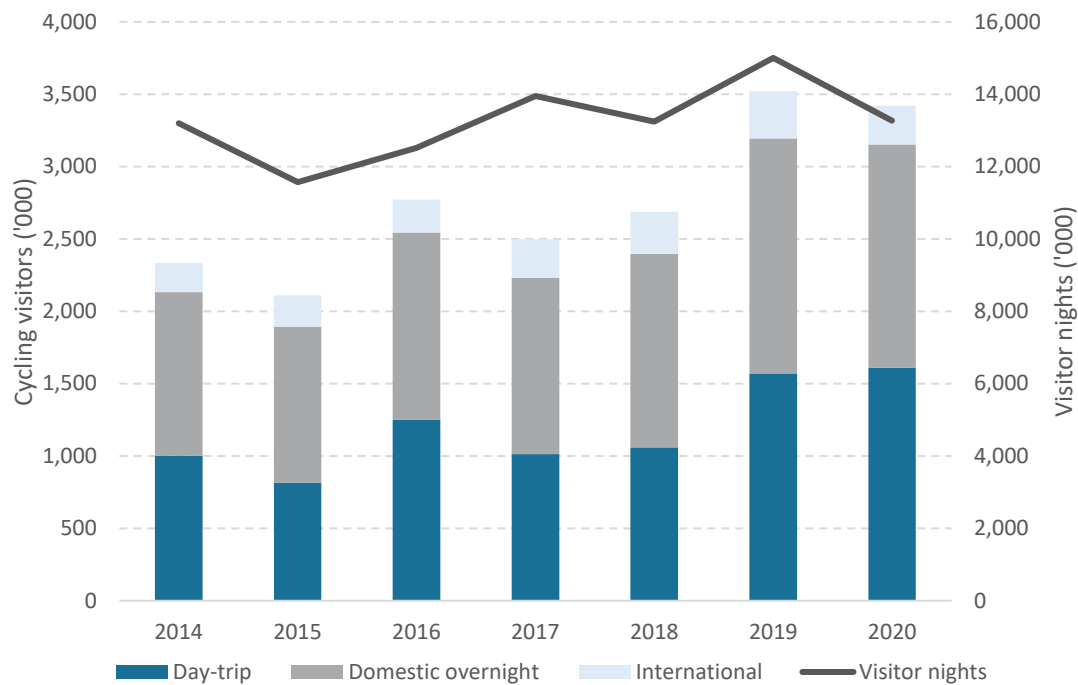
This report provides an overview of this research as well as key findings in regarding to the existing gaps and constraints in Nannup and the opportunities presented for future growth through becoming an established Trails Hub.

2. Tourism Trends

Research was conducted into visitor trends and activities related to various trails. Bushwalking is by far the most popular activity, followed by visiting wineries and then cycling.

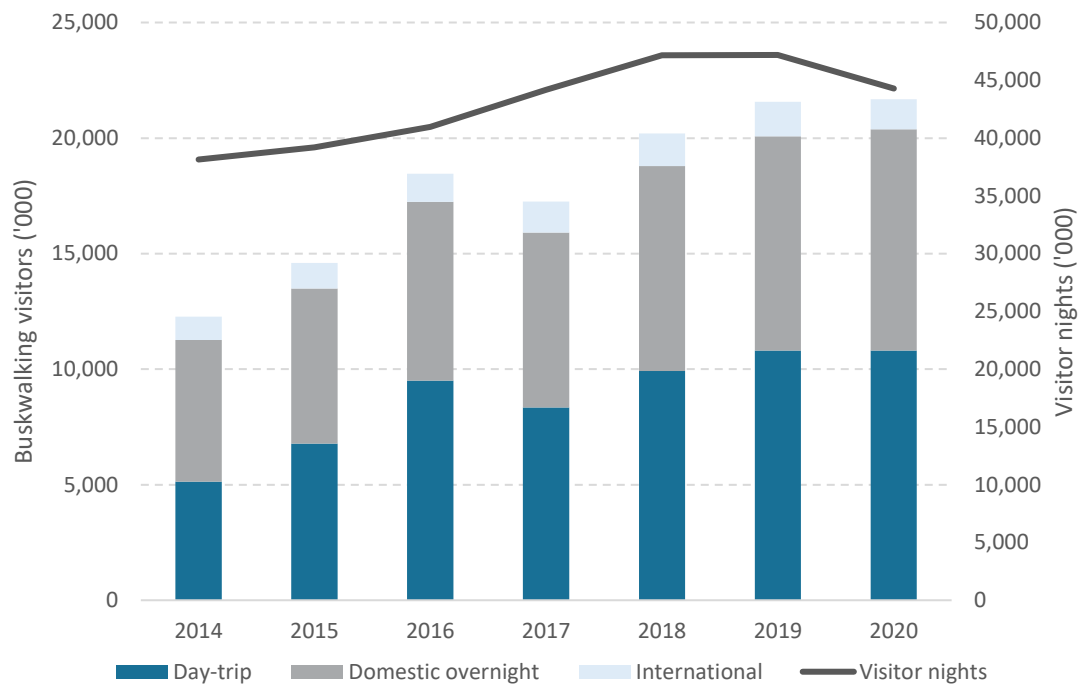
Overall, both cycling and bushwalking have showed strong growth over the recent history, averaging 10.4% and 10.8% annual growth in total visitors since 2014. While visitors to wineries seems to have plateaued, 'foodie' visitors to breweries and distilleries has grown substantially, showing strong interest in food and beverage tourism.

Figure 2.1. Visitors and Visitor Nights, Cycling (Australia)



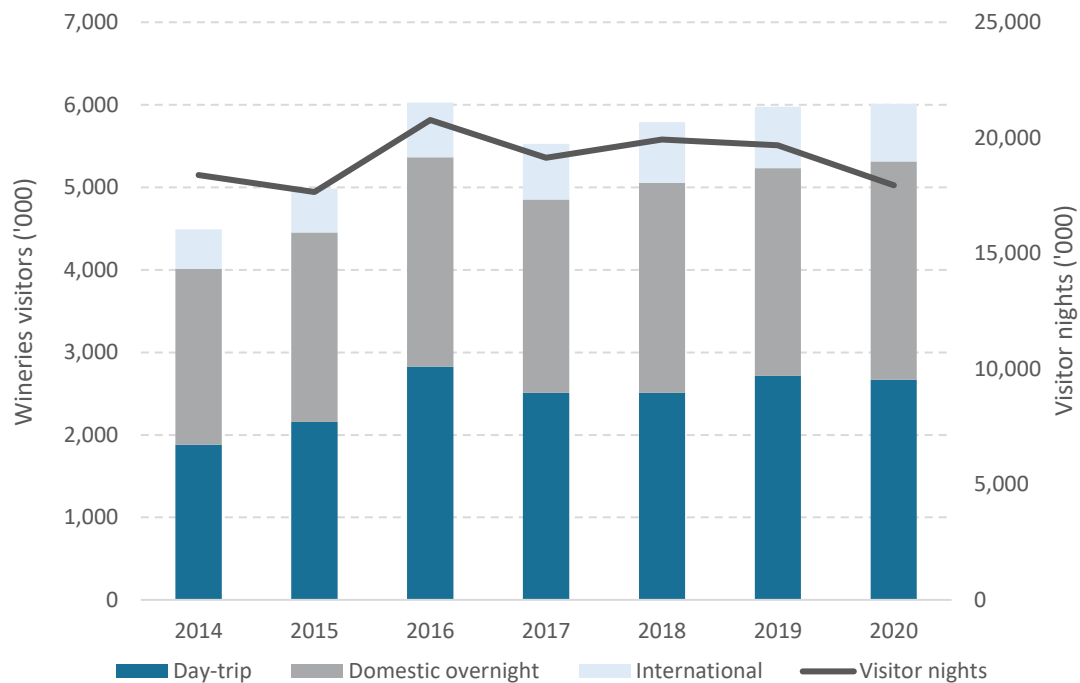
Source: TRA (2020)

Figure 2.2. Visitors and Visitor Nights, Bushwalking (Australia)



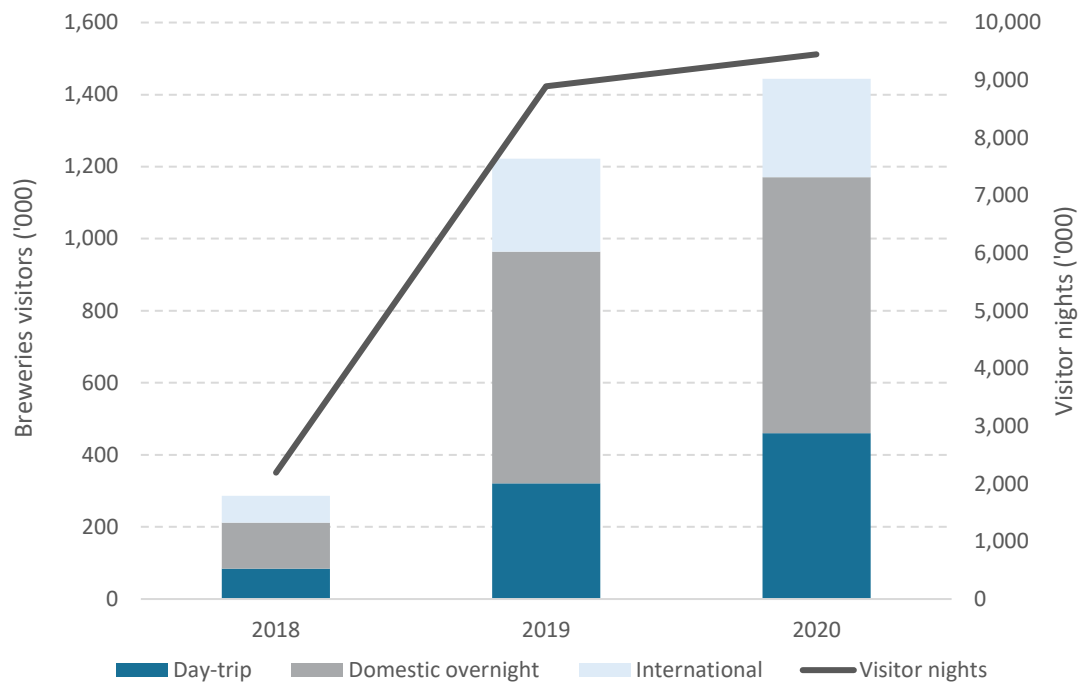
Source: TRA (2020)

Figure 2.3. Visitors and Visitor Nights, Visiting Wineries (Australia)



Source: TRA (2020)

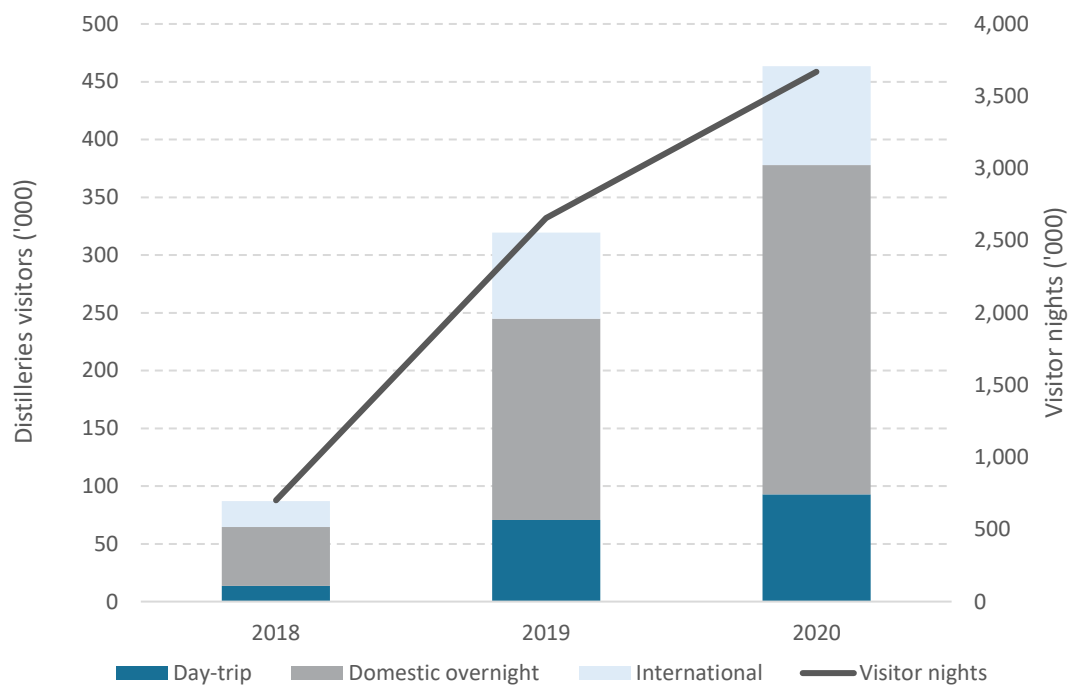
Figure 2.4. Visitors and Visitor Nights, Visiting Breweries (Australia)



Note: Data is only available from 2018.

Source: TRA (2020)

Figure 2.5. Visitors and Visitor Nights, Visiting Distilleries (Australia)



Source: TRA (2020)

3. Case Study Analysis

Case study analysis was conducted in order to provide a background and basis for the future development of Nannup as a trails hub. The following areas were selected for the case study analysis because they are all established trails towns:

- Blue Derby, Tasmania
- Bright, Victoria
- Forrest, Victoria
- Maydena Bike Park, Tasmania
- Thredbo, New South Wales
- Rotorua, New Zealand

These areas were selected were purposefully chosen from a mix of backgrounds. Some areas, such as Bright and Thredbo, are were existing tourism destinations that became trail hubs. They already had all the visitor infrastructure and found new ways to drive seasonal demand. Blue Derby in Tasmania is the most insightful case study for Nannup as this destination was created specifically for mountain biking.

February 2015 marked the official launch of the first 20km of the Blue Derby Trail Network, a joint initiative between Dorset Council and Break O Day Council with funding support from the federal government. The site was a former tin mine and mountain biking trails were created to take advantage of the natural beauty of the surrounding area. The development of the Blue Derby Trail Network was a bold initiative as it was completely untested in the market and there was no guarantee of success.

The market responded strongly to the project. After investing in and building the trails infrastructure, visitors came from around Australia and the world to ride. Blue Derby became the first Australian mountain bike trails to host the World Enduro Series in 2017 and played host again in October 2018 as well as for Round 2 in March 2019.

Stage one, comprising 23km of trails at Derby was launched in February 2015 and the final stages will be completed by June 2016, providing a full 80km of trails. This has all been made possible by the Australian Government's Community Development Grant Programme which allocated the project \$2.45 million. This amount was matched with \$700,000 in funding by a partnership of local stakeholders, making it the largest mountain bike trails project in Australia.

Since its opening, Blue Derby has been averaging 1,000 visitors a month and the town of Derby has seen new businesses open, including new accommodation and cafes (catering for mountain bikers) and an increase of residential and commercial real estate acquisitions.

Key characteristics of trail towns from the Case Study analysis include:

- **Accommodation:** Trail tourism covers a variety of markets, from families to couples, wealthy businessmen to students. The best accommodation offers is a mixture to suit different people's needs and budget. An ideal mix would include affordable lodge/hostel style for young, single and regular visitors on a budget to interesting Airbnb's and bespoke modern hotel/motel with cycling infrastructure such as secure storage/rack, washing bays.

- **Food retail and service:** Similar to accommodation, food retail and service needs to cater to a variety of tastes and needs. The ability to get a substantial healthy meal and a nice beer or wine after a big day on the trails will appeal to this market. Supermarkets open after 6pm and a choice of restaurants and cafes are important to support trails tourism. Surveys that have been completed across a range of trail projects indicate that this market segment is a high-yield market (i.e. visitors spending more than average), so the provision of upper market restaurants, cafes and specialty grocers is important to ensure these visitors enjoy their experience.

Specialist breweries/vineyards/cheese factories also make great tourism products.

- **Specialty services:** Bespoke services will grow in demand as part of the Trails Hub. Popular ones include shuttle services, bike rentals and repairs, and retail products to cater for riders/walkers.
- **World scale trails:** To seriously grow the exposure and include national and international participation, the design, development and management of a very high standard of trails, such as Blue Derby in Tasmania, is required.
- **Mix of activities:** Not everyone rides bikes and an important consideration should be to include activities for partners and children of the riders in the vicinity or neighbouring destinations. These activities can include horse riding, arts trails, food experiences, water sports, cultural experiences, shopping as well as a range of recreational activities.

The most important learning from the case study analysis is that the provision of infrastructure (i.e. riding/hiking trails, wash down facilities and other common user infrastructure) can drive demand and attract visitors. The increase in visitors provides a critical mass and attracts private sector investment into accommodation, food and beverage, specialty retail, etc.

4. Benchmarking

Benchmarking was conducted to demonstrate how Nannup compares to the other trail hub destinations from the case studies in order to identify current gaps and the various elements that Nannup needs in order to become a trails hub.

Nannup was benchmarked against the following areas:

- Blue Derby, Tasmania
- Thredbo, New South Wales
- Bright, Victoria
- Maydena Bike Park, Tasmania
- Rotorua, New Zealand

It should be noted that various geographic areas did not align to the boundaries of towns, so in some areas, data is based on LGA boundaries.

As highlighted in the following table (Table 4.1), all benchmarked areas have a significant visitor offering (accommodation, food and beverage, specialty retail – i.e. bike shops, etc.). At the same time, tourism has become an important part of these local economies, contributing greatly to jobs and investment.

Based on this assessment, there is a shortage of tourism infrastructure in Nannup, such as accommodation, restaurants and cafes and specialty retail that caters to cycling.

Table 4.1. Benchmarking Assessment

	Nannup WA	Blue Derby TAS	Thredbo NSW	Bright VIC	Maydena Bike Park TAS	Rotorua NZ
General Information						
Town Population (2016)	936	173	471	2406	225	75,100
Trails Visitors p.a.	11,600	30,000	300,000			500,000
Trail Types						
Mountain Biking	43km	99km	46km	70km	56km	413km
Hiking/Walking	37km	81km	32km+	12km		220km
Horse						46km
Rail Trails	37km			100km		
Road Cycling				250km		
Downhill			12km			
Accommodation (Establishments)						
Hotel		1	3	2		28
Motel				3		22
Houses		12	39	164	6	
Caravan Parks and Camping	1	1		5		
Units/Apartments			14	51		
B&B/Guesthouse	8	2	2	3	1	18
Hostels				1		7
Chalets/Cottages				43	1	1
Farm stay				1		
Specialty lodgings	1		2	6	1	3
Total Establishments	10	16	60	279	9	79
Food and Beverage Services						
Restaurants and Cafes	7	5	24	39	4	50+
Bespoke Retail Services						
Bike shops retail/repair	0	3	4	4	1	38
Other		Shuttle service	Shuttle service		Shuttle service	
Other Attractions		Zipline				Spa, fishing tours

Source: Lucid Economics through Google and Yellow Pages searches.

5. Stakeholder Engagement

5.1 Engagement Process and Stakeholders

Consultation with a range of stakeholders identified by the Shire (listed below) was undertaken by the consultant in face-to-face interviews across a two-day period. Where appropriate, the interviews were with small groups of stakeholders.

The purpose of the stakeholder engagement was to gain an appreciation of business owners' and the community's views about the Trail Hub Concept. In particular, to identify the opportunities that could arise from its adoption and the impediments that will need to be overcome to ensure its success.

The organisational affiliation of stakeholders interviewed is as follows:

- Shire of Nannup
- Melo Velo Café
- Blackwood Café
- Wide Eye Press
- Winwood Estate Winery
- Ray White Real Estate Nannup
- Holberry House
- Nannup Caravan Park
- BigN (Nannup Chamber of Commerce)
- Chestnut Brae
- Southern Forests Honey
- Southern Forests Blackwood Valley Tourism Association
- Time Travel Tours
- Jarrah Glen Cabins
- Nannup Brewing Company
- RideWA
- Bowling Club
- Flower & Garden committee

5.2 Summary of Stakeholder Engagement

5.2.1 Trails Hub Concept

- There is strong support for the Trail Hub Concept, especially in relation to cycling and mountain biking. There was also support for a range of other types of trails, including food and garden trails, agri-tourism trails, history trails, horse trails and canoeing
- There is a wide range of good attractions in and around Nannup that will encourage visitors to stay for a few days
- In this regard, there was support for extending some events (e.g. the flower festival)

- There were a number of issues and challenges raised in discussions that will need to be addressed in order for the Trail Hub Concept to be realised. These were:
 - A lack of short-term visitor accommodation
 - A limited food and beverage offering
 - A lack of vibrancy in the evenings
 - A need for better signage and branding and accessibility to some attractions
 - Issues around staff attraction and retention
 - Lack of a bicycle support service
 - A lack of overflow parking and a shuttle service
 - Maintaining Nannup's unique streetscape
- Each of these issues and challenges is discussed in terms of gaps and opportunities in the next section

5.2.2 Issues and Challenges

- Short-Term Visitor Accommodation
 - The Hotel is seen as sub-standard accommodation and an underutilised asset at present. Accommodation at the Hotel consists of 14 budget rooms upstairs with a shared bathroom, 6 units adjacent to the Hotel and 2 houses (3 bedroom and 4 bedroom) located at the rear of the Hotel. There has been a lack of investment to bring the Hotel up to contemporary accommodation standards
 - The Nannup Caravan Park lacks sufficient powered sites to accommodate the overflow of visitors during events. The Park has applied for a grant to provide an additional 60 powered sites. The Caravan Park also requires more private ablutions (e.g. ablution pods)
 - It was proposed that once the Caravan Park is full, other sites should be allowed to take caravans. For example, Holberry House would like to host caravans during events. The foreshore and the Recreation Centre could also be used to cater for overflows
 - There is a need for a more up-market motel (3 or 4 star) with a restaurant and conference facilities. This will help attract tourist buses to Nannup. Several potential sites have been identified
 - The number of beds covered by chalets and B&Bs has been declining due to property sales. There is also a trend away from 'breakfasts provided' to self-catering
 - The possibility of free camping was raised. This has implications for commercial accommodation providers. The mountain bike fraternity often camp in the bush
 - There is need for better training of staff in the hospitality sector
 - Securing reliable cleaning staff is also problematic. They are in short supply and can be choosy in the type of work they are prepared to do. While there are a couple of contract cleaners in Nannup there is a business opportunity for contract cleaning, including servicing chalets and B&Bs
 - Scheduling events on long weekends creates problems for accommodation
 - There is a need for a strategy around accommodation. Investors will not build accommodation without a clear view on returns
- Food and Beverages
 - There are 3 cafes in Nannup. There is an issue around opening hours, with most closing at 3 pm. The Blackwood Cafe is now offering evening meals on some nights
 - The standard of service can be variable, especially during busy times where wait times can be long. Simplified menus and trained staff can help overcome this problem. There is an opportunity for a coffee van and/or pop-up coffee shops at appropriate locations during events and other busy times

- Attracting and retaining qualified staff is challenging. Better training of staff is also needed
- The Hotel offers traditional 'pub meals'. It averages around 50 meals/night. With no permanent full-time chef, the quality of the meals can vary. The Hotel offers \$7 pints happy hours and meal specials on certain evenings (e.g. T Bone steak and a pint)
- The fish & chip shop is open most evenings, but it closes at 7.30 pm. There is an opportunity for more tables and chairs to promote casual dining – maybe on the vacant block next door
- The impending opening of the Nannup Brewery will fill a gap in the food and beverage market with the provision of an up-market bar and restaurant. The Brewery plans to provide showers and bike racks for bike riders. Also, an outdoor cinema. It will focus on local produce with a local chef and local staff. The owner is trying to make it affordable and wants to attract both tourists and locals. Greater opening hours are planned, especially on weekends
- An up-market restaurant in a new motel development would be welcomed
- The Nannup Supermarket has restricted opening hours, closing at 5.30 pm on weekdays and 12 noon on Saturdays and is not open on Sundays. This makes it difficult for visitors wishing to stock up on food. It would also benefit from a renovation to modernise the facility
- Vibrancy
 - There is a lack of night life and social vibe in Nannup. This can be attributed in part to the lack of restaurants and bars. As mentioned above, the opening of the Nannup Brewery may help to remedy this
- Signage, Branding and Accessibility
 - The current visitor information display in the Blackwood Café is inadequate
 - There is concern that Nannup lacks a tourism coordinator/promoter and there is not enough people working in tourism promotion
 - However, the case for a dedicated visitor information centre is not supported as it would most likely be too expensive and would have to rely heavily on volunteers to function
 - There is support for a digital visitors' centre in the form of an information kiosk in an appropriate location and a Nannup Tourism website with links to events, attractions and other organisations involved in tourism in and around Nannup. This is worthy of further investigation
 - The majority of forest trails and attractions need better maps and signage
 - There is a need to include the Nannup name in events where possible
 - Evidence shows that bike riders typically visit Nannup for 3 nights. One day is spent bike riding and 2 days visiting attractions. They typically have money to spend
 - While there is a wide range of attractions in and around Nannup, irregular opening hours of some of these can be frustrating to visitors. The lack of wineries with cellar doors is potentially a lost opportunity to attract visitors
 - Time Travel Tours offers a small bus tour of key attractions. This is convenient for people with limited time or a lack of transport
- Staff Attraction and Retention
 - Businesses find it difficult to attract and retain qualified staff
 - There is a view that Nannup is a lifestyle town, which impacts peoples' desire to work
 - One problem is the lack of short-term rental accommodation. There is a growing move towards Airbnb
 - The development of the Greenbushes Lithium Mine could increase the demand for housing in Nannup as the Company has a policy of employing local staff

- Some people do not adjust to small town living and leave
- The lack of schooling to Year 12 may be a barrier for some families
- There is a lack of winter activities for kids
- The development of a strategy around accommodation should also include consideration of short-term and long-term rental accommodation
- There was concern expressed around obtaining approvals for sub-divisions for property developments, especially in bushfire-prone areas
- The impact of the Residential Tenancy Act on accommodation needs was questioned
- **Bicycle Support Service**
 - There is a lack of a good bicycle support service to provide spare parts, technical advice and a repair facility. This could be coupled with bike/canoe hire
 - Some facilities are being developed (e.g. bicycle wash-down facility and a self-repair facility). The Nannup Brewery is planning to install showers and bike racks for cyclists
 - It is unlikely there would be sufficient demand for such a service day-in/day-out. However, such a service could be provided as a pop-up for events and busy weekends. This is a business opportunity, possibly for existing bicycle shops in the region
- **Parking, Public Transport and Shuttle Service**
 - There is a problem with overflow parking during events and on busy weekends
 - The Shire has identified a site in town and is in the process of acquiring access to the site
 - There is currently a lack of a taxi service in Nannup
 - A shuttle service from Nannup to the trails was proposed. This is a business opportunity
- **Nannup's Unique Streetscape**
 - It was emphasised that it is imperative that Nannup's unique streetscape be preserved
- **Other Matters**
 - There was concern expressed that Nannup is in the shadow of Busselton and Margaret River
 - How does Nannup successfully compete for cruise ship visitors and arrivals at the new Busselton Airport when it opens?

5.2.3 Business Opportunities

A number of business opportunities emerged in the consultation. These were (but not limited to):

- The development of a new 3 to 4 star motel with a restaurant and conference facilities. Potential sites have been identified
- Redevelopment of the Nannup Hotel
- Pop-up café or coffee van
- Development of a bicycle support service – possibly as a pop-up in one of the vacant premises
- A contract cleaning service
- A shuttle service to various trails
- A supermarket with longer opening hours and expanded offering
- A chocolate shop
- A gourmet shop

6. Gaps and Opportunities

6.1 Priority Opportunities

This assessment has identified the following current gaps and future opportunities associated with Nannup becoming a trails hub:

- The development of new short-stay accommodation, which could include:
 - A new 3 to 4 star motel/hotel with a restaurant and conference facilities
 - Expansion of the Nannup Caravan Park to include more tiny homes/cabins
 - New self-contained cabins/tiny homes (8-12 units)
 - New holiday park (mostly cabins with some powered sites as well as main facilities – i.e. restaurant/café/bar, playground, etc.)
- Redevelopment of the Nannup Hotel
- Provision of pop-up cafés or other form of mobile food or beverage provision
- Development of bespoke bicycle support service (i.e. repair, maintenance, sales), possibly as a pop-up in the short-term
- A shuttle service to various trails
- More boutique food and beverage offering (i.e. wine bar, tapas bar, chocolate shop, gourmet local foods shop, etc.)
- Other non-cycling related services
 - A supermarket with longer opening hours and expanded offering
 - A contract cleaning service

Combined, these opportunities would support Nannup becoming a trails town (together with further trails development to drive demand).

6.2 Site Selection

A site selection process was undertaken to identify potential sites for new accommodation development. The process included:

- Review of the Shire of Nannup Local Planning Strategy
- Engagement with the Shire's planning officer (regarding zonings and potential future accommodation development)
- Site inspection of Nannup (both in-person and via satellite imagery)

Sites suitable for short-stay accommodation are unique. They require a sufficient size to allow for a critical mass (i.e. minimum number of rooms/units) and must be located in easy to find areas (along major highways or main roads is most ideal). These sites must also have a required surrounding amenity, which could be created through access to local shops, cafes, etc. or could also be created through access to natural surrounds.

The site selection process identified seven priority development sites for short-stay accommodation (Table 6.1). These sites all have characteristics that make them opportune development sites over the short-term.

Table 6.1. Short-stay Accommodation Sites, Nannup

Site	Size (ha)	Main Characteristics
Old Golf Course	17.0	<ul style="list-style-type: none"> • Large, secluded site • Existing utility infrastructure • Natural setting for cabins or holiday park • Adjacent to Tank 1 (future mountain biking trails)
Vasse Hwy North	15.9	<ul style="list-style-type: none"> • Large site across three parcels • Proximity to town and Blackwood River • Zoned for tourism use
Tantalum Rd South	28.8	<ul style="list-style-type: none"> • Large site located close to town • Directly off of Brockman Hwy (across from Tank 7 & 8) • Currently developing structure plan for accommodation
Asplin Rd	8.6	<ul style="list-style-type: none"> • Large site, located close to town • Zoned for tourism use • Directly off of Brockman Hwy
Former Girl Guides	20.3	<ul style="list-style-type: none"> • Large site set amongst natural setting • Directly off of Brockman Hwy • Existing utility infrastructure • Current zoning would allow some forms of accommodation
DBCA Site	1.4	<ul style="list-style-type: none"> • Large site, along the main street in town • Accessible from main street, Carey St and Brockman Hwy
Kearney St	2.2	<ul style="list-style-type: none"> • Large site, along the main street in town • Part of the site is zoned for tourism use • Total developable area is 1.4 ha • Accessible from main street and Kearney St

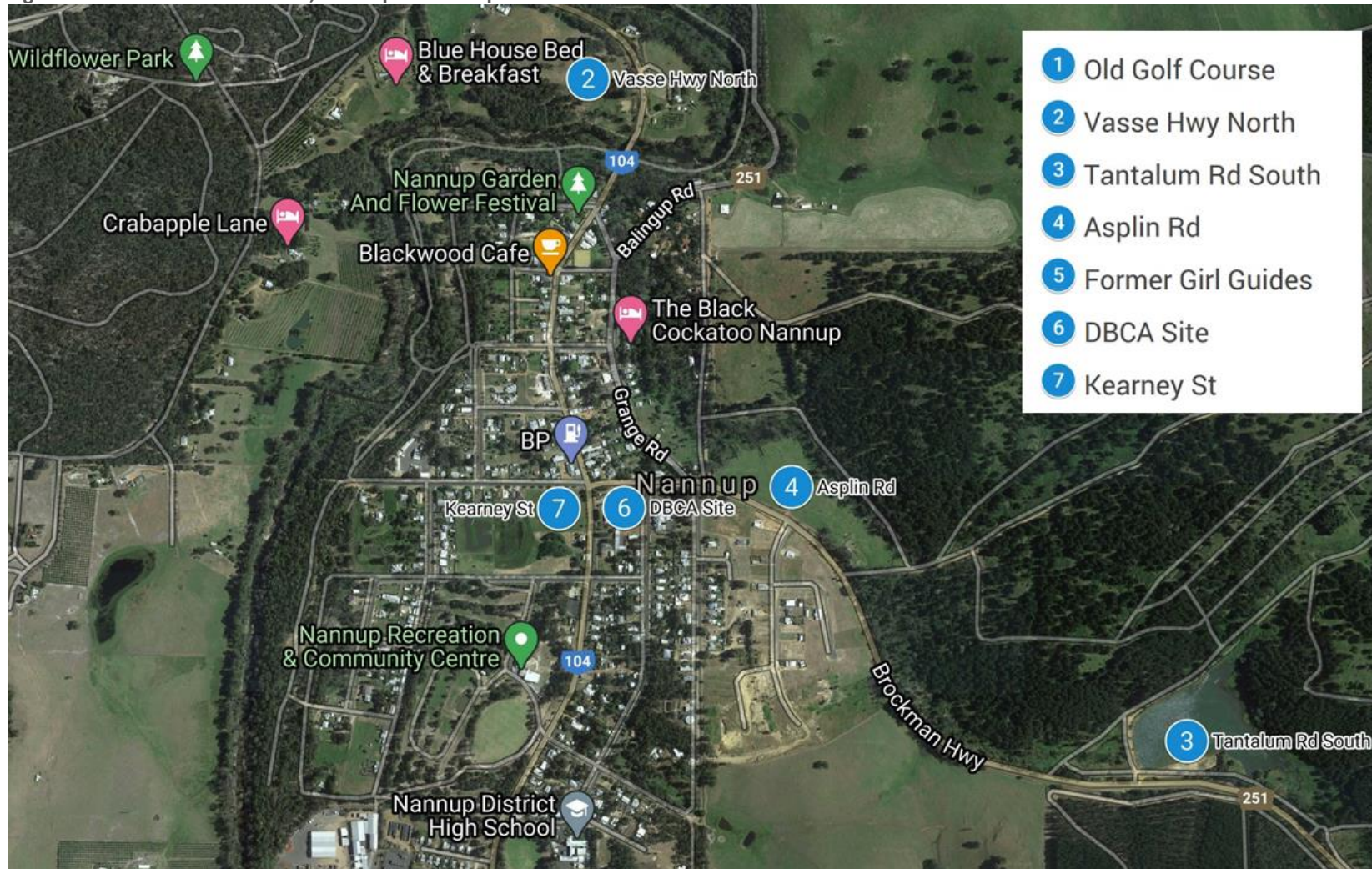
Source: Lucid Economics

Figure 6.1. Accommodation Sites, Nannup



Source: Lucid Economics

Figure 6.2. Accommodation Sites, Nannup Town Map



Source: Lucid Economics

There are additional sites that may also lend themselves to future development that includes accommodation or alternative uses for visitors. These sites have constraints that prevented them from being named a preferred site for accommodation, but these constraints could be overcome.

These sites include:

- **Water Corporation Site:** a 3,500 sqm parcel, located in town on Grange Rd, just south of the Bowls Club. The site is of a significant size, however, still has some minor infrastructure that belongs to Water Corporation. As the site is owned by Water Corporation, they would have to consent to any development and likely offer the site through an EOI process (if they could manage any conflict with their infrastructure). The site could function as a parking lot, which would provide a centralised facility in town, near shops and services, that could be utilised for day trippers as well as during peak periods.
- **Sites Along Jephson St:** there are various sites along Jephson St (between Forrest St and Adam St). Some of these sites range between 2,000 sqm and 3,000 sqm, which would be suitable for some scale of accommodation development. The sites on the eastern side of Jephson St also have frontage along the main street.
- **Bowls Club:** the 0.6 ha site is at the northern entrance to town and the 4,000 sqm of developable space could be used as a central town square or meeting place for visitors, potential food and beverage offering or a larger central community plaza (for residents and visitors)

7. Project Prioritisation

7.1 Priority Projects and Evaluation Framework

The Nannup Cycle Master Plan identified a wide range of future infrastructure projects to support further cycling activities across the Shire. The Plan identified the following projects:

- **Nannup Townsite**
 - Principle Trailhead
 - Blackwood River Suspension Bridge
 - Riverside Trails
 - Town link Trail (currently underway)
 - Asplin Arboretum
 - Mundi Biddi Realignment
 - Southern Traffic Bridge
 - Freestyle Jump Park
- **Mountain Biking**
 - Tank 7&8 (currently underway)
 - Tank 1 and Tank 5
 - Ellis Creek State Forrest MTB Network
 - Lewana State Downhill Track
 - Donnelly Trail Hub MTB Network
 - Adventure Trail Link Nannup to Donnelly
 - Munda Biddi Realignment
 - Trees to Seas (Nannup to Margaret River)
 - Raubon – Tutunup Rail Trail (Nannup to Busselton)
- **Road Cycling**
 - Nannup – Balingup – Bridgetown
 - Gold Gully – East Nannup Rd
 - Brockman Hwy – Sears Rd – Mockidilup Rd – Graphite Rd – Nannup
 - Mowen Rd – Sues Hwy – Vasse Hwy – Nannup
 - Brockman Hwy – Marrinup Ford Rd – Nannup Balingup Rd
 - Vasse Hwy – Cudinup South Rd – Kirup-Nannup- Balingup Rd
- **Gravel Cycling**
 - Yanmah Brook Circuit
 - Willow Spring Circuit
 - Pool Road – Swamp Road – Tin Mines Road
 - Andrews Road to Donnelly River
 - Barrabup 03 to Cudinup
 - SEVEN Training routes
 - Link to Linga Longa Bike Park

In order to prioritise these projects, the metrics highlighted in Table 7.1 were used. These metrics were selected to identify the projects that could have the maximum benefit at the lowest cost and that could be implemented in the shortest amount of time.

Projects were scored on a basis of 1-10, with 1 being the lowest score and 10 being the highest. Projects were ranked across the three metrics relative to one another, so a project scoring a 10 in benefit would provide the maximum benefit across the projects and a project that scored 1 in capital expenditure would likely be the most expensive project to implement.

Table 7.1. Project Prioritisation Metrics

Metric	Description
Capital Expenditure	This criteria is based on the relative requirement for capital. High scores for this criteria are provided to projects that would require relatively little capital in order to implement. Consideration was given to the identified 'Infrastructure requirements' highlighted in the Nannup Cycle Master Plan.
Timing	This criteria is based on the relative time required to implement the project, which would include gaining any and all permits and approvals as well as the time required for detailed design and/or engineering. High scores for timing are provided to projects that require relatively shorter timeframes to implement.
Benefit	This criteria is based on the relative future benefit from the project, in terms of its ability to drive visitation and expenditure in Nannup. High scores are provided to those projects that would drive relatively higher levels of visitation. Consideration was given to the target markets identified for each project in the Nannup Cycle Master Plan, with preference given to those projects targeting multiple segments as well as those targeting the 'enthusiast' market, as this group would likely have the greatest impact on visitation and expenditure.

Source: Lucid Economics

7.2 Project Prioritisation

Based on the evaluation (Table 7.2 on the following page), the top scoring projects are:

- Freestyle Jump Park (24)
- SEVEN Training routes (24)
- Link to Linga Longa Bike Park (24)
- Tank 1 and Tank 5 (23)
- Brockman Hwy – Sears Rd – Mockidilup Rd – Graphite Rd – Nannup (23)
- Brockman Hwy – Marrinup Ford Rd – Nannup Balingup Rd (23)
- Yanmah Brook Circuit (23)
- Willow Spring Circuit (23)
- Pool Road – Swamp Road – Tin Mines Road (23)
- Barrabup 03 to Cudinup (23)
- Principle Trailhead (21)
- Southern Traffic Bridge (20)
- Adventure Trail Link Nannup to Donnelly (19)

Table 7.2. Project Prioritisation Evaluation

Project	Capital Expenditure	Timing	Benefit	Total
Nannup Townsite				
Principle Trailhead	7	7	7	21
Blackwood River Suspension Bridge	7	5	3	15
Riverside Trails	7	7	3	17
Town link Trail (under construction)				
Asplin Arboretum	7	4	7	18
Mundi Biddi Realignment	4	5	4	13
Southern Traffic Bridge	7	7	6	20
Freestyle Jump Park	7	7	10	24
Mountain Biking				
Tank 7 & 8 (under construction)				
Tank 1 & Tank 5	6	7	10	23
Ellis Creek State Forrest MTB Network	6	3	9	18
Lewana State Downhill Track	3	6	8	17
Donnelly Trail Hub MTB Network	6	1	9	16
Adventure Trail Link Nannup to Donnelly	6	6	7	19
Munda Biddi Realignment	4	5	4	13
Trees to Seas (Nannup to Margaret River)	1	4	10	15
Raubon – Tutunup Rail Trail (Nannup to Busselton)	3	2	10	15
Road Cycling				
Nannup – Balingup – Bridgetown	3	5	7	15
Gold Gully – East Nannup Rd	6	5	7	18
Brockman Hwy – Sears Rd – Mockidilup Rd – Graphite Rd – Nannup	8	8	7	23
Brockman Hwy - Stacey Rd - Denny Rd - Brockman Hwy - Nannup	5	5	7	17
Mowen Rd – Sues Hwy – Vasse Hwy – Nannup	3	5	7	15
Brockman Hwy – Marrinup Ford Rd – Nannup Balingup Rd	8	8	7	23
Vasse Hwy – Cundinup South Rd – Kirup-Nannup- Balingup Rd	4	5	7	16

Project	Capital Expenditure	Timing	Benefit	Total
Gravel Cycling				
Yanmah Brook Circuit	9	8	6	23
Willow Spring Circuit	9	8	6	23
Pool Road – Swamp Road – Tin Mines Road	9	8	6	23
Andrews Road to Donnelly River	9	3	6	18
Barrabup 03 to Cudinup	9	8	6	23
SEVEN Training routes	9	8	7	24
Link to Linga Longa Bike Park	9	8	7	24

Source: Lucid Economics

Based on this process, the following projects should be pursued over the short-term (next 3-5 years), including:

- Freestyle Jump Park
- Southern Traffic Bridge
- Tank 1 and Tank 5
- Principle Trailhead
- Adventure Trail Link Nannup to Donnelly
- Signage, Branding and Mapping for Gravel Routes
- Signage for Road Cycling Routes

While the remaining projects can all have a positive impact and will contribute to Nannup becoming a trails hub, they should be pursued over the medium to long-term.

7.3 Additional Priority Actions

While some of the projects above did not score favourably as specific aspects of these projects would either require considerable time or money, there are actions that should be taken to pursue them. These projects include:

- **Trees to Seas (Nannup to Margaret River):** while much of this 130km track would be on existing gravel back roads, it would still require considerable time for planning and approvals as well as capital to construct. As such, its development cannot be pursued in the immediate future (i.e. 3-5 years), however, given the future potential significance, it should be investigated (together with the Shire of Augusta-Margaret River and other stakeholders) and initial inquiries made into land tenure and potential environmental constraints. This trail could be instrumental in encouraging a range of trail users, including horse riding.
- **Raubon – Tutunup Rail Trail (Nannup to Busselton):** this 27km route along the rail corridor crosses areas that have high environmental values and are extremely sensitive, so this development cannot be undertaken in the short-term. However, sanctioning the trail may assist to protect and conservation values, so investigations should be undertaken with DBCA and various landowners around this concept.
- **Shoulder Widening for Road Cycling:** the widening of roads to develop larger shoulders for road cyclists has been highlighted across many of the identified road cycling routes. The Shire cannot pursue these projects but should lobby Main Roads to undertake this work. As the popularity of Nannup grows and more visitors are attracted to the area, safety concerns will increase. The risk of having a life threatening incident is significant to the success of Nannup as a trails hub destination.
- **Donnelly Trail Hub MTB Network:** while this project would attract significant visitation, the area is a public drinking water source area (PDWSA), which presents considerable constraints. However, there are existing trails in this area and the development of this network could link back to Nannup and provide access to the Donnelly River Village (for accommodation, food and retail). Discussions with DBCA and Water Corporation should be undertaken to explore the potential of developing this network.

8. Recommendations

Based on the research, analysis and consultation conducted for this project, the following recommendations are provided:

- The Shire of Nannup should pursue a business case for the above identified priority projects over the next 3-5 years
- The Shire of Nannup should pursue the identified priority action in order to progress various projects over the medium to long term
- The Shire of Nannup should pursue a pro-active investment attraction campaign seeking to:
 - Raise the profile of Nannup as a visitor destination (for trails)
 - Promote the current (and future) private sector investment opportunities into trail infrastructure and the resultant increase in visitation
 - Promote the diverse range of sites identified for future accommodation development
- The Shire of Nannup should continue to work with the Department of Biodiversity, Conservation and Attractions (DBCA) regarding various recommendations of the Nannup Cycle Master Plan and the Warren-Blackwood 2050 Cycle Plan
- The Shire of Nannup should consider future expansion of the Caravan Park (to provide a greater mix of cabins/tiny home)
- The Shire of Nannup should engage with the owner of the Nannup Hotel regarding potential for future redevelopment
- The Shire of Nannup should pursue the potential for land swaps to gain control of key accommodation development sites
 - If successful, the Shire should pursue an EOI process for future tourism development aligned to the Trails Hub concept

References

ABS (2020). Counts of Australian Businesses. Cat. No. 8165.0. Australian Bureau of Statistics, Canberra.

TRA (2020). *National Visitor Survey*. Tourism Research Australia, Canberra.

TripAdvisor (2020). Accommodation searches and property information. Available from www.tripadvisor.com.au. Last accessed 2 September 2020.

Appendix A: Detailed Case Studies

Blue Derby, Tasmania

Derby is a small Australian town located in the northeast of Tasmania. The area had been surveyed in 1855, but was not settled until 1874, when George Renison Bell discovered tin in the area. The Krushka brothers discovered a large lode of tin, and set up a mine in the area, assuring the town's economic future. Derby reached its peak in the 19th century when the town's population reached over 3,000. February 7th, 2015 marked the official launch of the first 20km of the Blue Derby Trail Network, a joint initiative between Dorset Council and Break O Day Council with funding support from the federal government. Blue Derby Trails are designed and built by World Trail.

Location Profile

Elevation: 164 m	Area: 77.7 m ²
Location: 35 km E of Scottsdale (pop 2373) – Main commercial centre	
ROI: \$30 million-a-year return on that \$3.1 million investment.	

Population Profile

Population: 173 (2016 census) Median Age: 56
129 private dwellings

Visitor Profile

MTB visitors: 30,000
Average tourists are staying four to five nights in Derby then another five days elsewhere in Tasmania

Investment history:

- 2013 - \$2.45 million Regional Development Australia Fund. \$550k investment from other project partners.
- 2017 - Funding for Blue Derby Stage 2. \$2.5M Federal Government, \$600k Local Government 2017 - \$6 million – Department of State Growth
- 2018 - Funding for Wild Mersey Stage 1 announced: \$300k Federal Government, \$600k State Government, \$200k Local Governments
- 2018 – Labour Government commitment to \$4 million state-wide Tracks and Trails Community Grants Program

Trail Specific Infrastructure

<ul style="list-style-type: none"> • 2015, opening of 30 kilometres of trails • planned 80km network costing \$3.1 million • 2017 start of Enduro World Series

Supporting Infrastructure

Bespoke retail	3 MT bike specific retail/repairs/shuttles
General Retail	Main commercial centre Scottsdale 23km
Accommodation	21 commercial accommodation within 27km
Food service providers	6 restaurants within 23km
Main access roads	100 km E of Launceston; 300 km NNE of Hobart
Other	Plans to build a zipline down from the cliff to the town and have water sports on the lake



Bright, Victoria

Picturesque village on the Ovens river, deciduous trees in Autumn splendour Proximity to Victoria's alps, national parks and local food and wine. Cycling product: Murray to Mountains Rail Trail, Mystic Mountain Bike Park, Road Cycling Good base for winter and summer adventure activities

Bright is a town that is mad about cycling with great support services, bike hire (mountain, hybrid and electric bikes) and a trail network that offers a unique mix of riding trails for all skill levels. The trails are mostly hand-built and have been developed and improved over many years. The area encompasses everything from flat gravel roads to steep and technical climbs and descents. Bright caters for enthusiastic amateurs on cross-bikes, family groups with kids on trainer wheels, mountain biking adventurers and serious road warriors.

Environment: Located 3-4 hrs North East of Melbourne Spectacular natural environment. Vibrant and thriving communities and friendly villages. Abundant with nature-based and outdoor adventure experiences: including cycling, hiking, skiing, gliding and climbing. Supported by gourmet restaurants, farm-gates, wineries and boutique breweries.

Area Profile

Elevation:, 319 metres

Location: 321 km (199 mi) NE of Melbourne

Population Profile

Population: 2,406

Visitor Profile

Cycling visitors: The region currently receives 103,000 cycle tourists per year, spending \$50 million when in region – more than any other regional destination Cycle tourism visitor growth is forecast to continue, with the mid-growth scenario projecting 255,000 visitors participating in cycling in Victoria's High Country by 2025

Trail Specific Infrastructure

- Mountain Biking: Seven unique mountain bike parks and 50% of all formalised mountain bike single track in Victoria, including the only internationally recognised trails in Australia.
- Road Cycling: Six of the toughest 15 road cycling climbs in Australia, including five category 1 and hors category.
- Events: Highly regarded cycling events for every rider level. Family friendly rides, to advanced road and mountain biking competitions

Supporting Infrastructure

Bespoke retail	Bike hire: Cyclepath in Bright hires out bikes and equipment. Absolute Outdoors Australia Bright Electric Bike Hire Myrtleford Cycle Centre Bike Taxi Service: Cyclepath Myrtleford Cycle Centre
General Retail	Approx. 25 specialty retail shops, souvenirs, clothing...and another 25 in neighbouring villages
Accommodation	Mix of apartments, B&B, holiday houses, caravan parks
Food service providers	31 eateries, restaurants, cafes, wineries, breweries
Other	Bicycle transport services are available and there are a number of tour operators in the area offering tailor-made packages and guided cycling holidays from the sedate to the adventurous. The green cycle friendly business logo highlights business supporting cyclists



Forrest, Victoria

Forrest – in the quiet hinterland of Victoria’s always-busy Great Ocean is the Aussie town that mountain biking saved. If it were not for people throwing themselves down single tracks through the bush on expensive bits of titanium or carbon, Forrest would be a ghost town by now, full of memories, but no people.

When the last timber mill closed, locals who stayed worked with state government thinking of ways to save Forrest. A decision was made to use government funds to build a series of mountain bike trails that would surpass any others in the country. Over 65 kilometres of world-class single-track trails were cut through the tall, eucalypt forests and dense fern gullies that border town. the Forrest Brewery Company – is a social affair and one of the region’s most notable food stops.

After the cessation of logging in the Otways, the Government of Victoria made funds available for the creation of dedicated Mountain bike trails in the Yaugher area, in order to replace the logging industry. Mountain biking was seen as an addition to the already plentiful eco-tourism industry. Mountain biking now makes up a large portion of the economy in Forrest. The area now has over 60 kilometres (37.3 mi) of sign posted "single track"

Area Profile

Elevation: 182m

Location: Forrest, Victoria in the heart of the Otway Ranges. About 30 kilometres inland from the Great Ocean Road and 162 kilometres from Melbourne.

Population Profile

Population: 230

Visitor Profile

Annual mountain bike events now bring up to 3000 competitors and visitors into the township each year.

Events: Forrest is home to the following annual Mountain Bike Events, Forrest Festival - 2 day multistage event

Otway Odyssey - 100k event, Forrest 6 Hour - 6 Hour event by teams and individuals

Supporting Infrastructure

Bespoke retail	Forrest Hire Bikes
General Retail	microbrewery, upmarket restaurant, "pub", general store, bike hire cafe, guesthouse, and a variety of accommodation rentals, Cycles of Forrest
Accommodation	Places to stay in Forrest range from four-star bed and breakfast, to cottage-style accommodation, cabins and campgrounds. Coastal resorts of Apollo Bay, Skenes Creek, Grey River, Kennett River and Lorne.
Food service providers	5 food service providers Brewery, restaurant, cafes in Forrest
Main access roads	Great Ocean Road
Trail Specific Infrastructure	When the project is finalised Forrest 66-kilometre network will be redeveloped and an additional 38 kilometres of world class trails will be created.
Future plans	2 Day Great Ocean Road Tour and Platypus paddle Initial funding \$100,000 The revitalisation of the Forrest Mountain Bike Park has the green light following a \$500,000 grant offer from the state government



Maydena Bike Park, Tasmania

Maydena Bike Park is a gravity-focused mountain bike park open now in Tasmania's Derwent Valley. Maydena Bike Park's trails have been developed by Tasmanian-based specialist trail company, Dirt Art.

Currently, boasting has 62+ individual trails including a top to bottom family-friendly ride, wilderness trail and epic pro trails. All trails capitalise on the park's unique rainforest environment and massive 820m vertical elevation, offering trails of all types, for all abilities.

The park is serviced by a year-round up-lift bus service, servicing both mountain bikers and sightseers. Multiple gravity trails will capitalise on the unrivalled 820m+ vertical elevation available on site, offering a vast array of epic, long distance descending trails, catering for all abilities.

The Park offers; shuttle uplift service, sightseeing tours, bike hire, retail bike shop, café, bar, skills coaching and group skills sessions, and a wide range of tours.

Area Profile

Elevation: 164 m	Area: 77.7 m ²
------------------	---------------------------

Population Profile

Population: 225

Visitor Profile

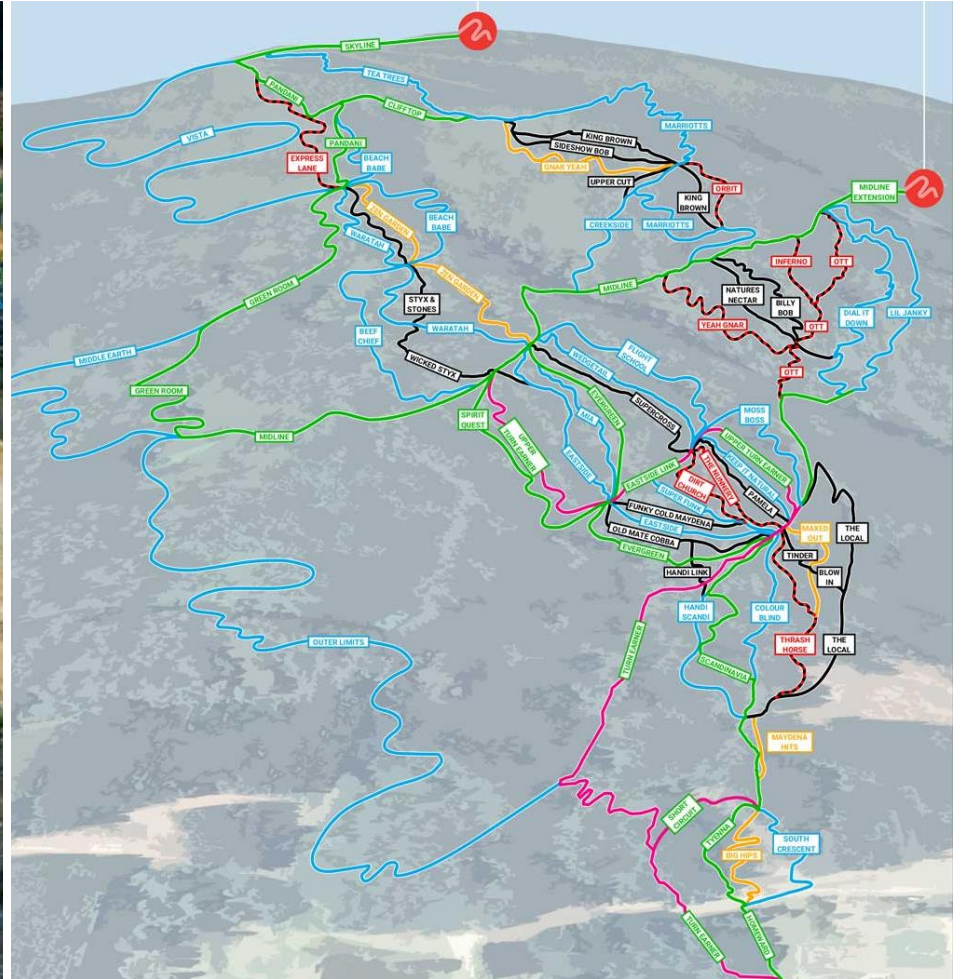
MTB visitors:

Trail Specific Infrastructure

- | |
|---|
| <ul style="list-style-type: none"> • 2015, opening of 30 kilometres of trails • planned 80km network costing \$3.1 million • 2017 start of Enduro World Series |
|---|

Supporting Infrastructure

Bespoke retail	Maydena Bike shop, repair and retail
General Retail	Main commercial centre Scottsdale 23km
Accommodation	21 commercial accommodation within 27km
Food service providers	6 restaurants within 23km
Main access roads	100 km E of Launceston; 300 km NNE of Hobart
Other	plans to build a zipline down from the cliff to the town and have water sports on the lake



Thredbo, New South Wales

Traditionally a winter resort, Thredbo has expanded its seasonal tourism to be the ultimate summer adventure destination. Nestled in the heart of the Kosciuszko National Park, it ticks all the boxes for a great summer getaway boasting some of Australia's most scenic hiking trails, longest gravity biking trails, fishing and much more.

Thredbo Mountain Bike Park is home to some of the best alpine riding in the country. There's chairlift accessed gravity trails, skills parks for all ages, a linked network of cross-country trails, a fast-flowing pump track and a team of qualified guides to take your riding to the next level.

Area Profile

Elevation: 1365m

Population Profile

Population: 471

Visitor Profile

Summer Trail visitors: 300,000 plus

Trail Specific Infrastructure

Thredbo offers over 34 kilometres of mountain bike trails to enjoy. Thredbo offers over 20 different walks and hikes for those looking for an outdoor adventure, experience the stunning scenery of alpine Australia and conquering Australia's highest peak, Mt Kosciuszko.

The Thredbo Valley Trail is a shared-use trail which takes riders down the picturesque Thredbo Valley and includes some amazing suspension bridges. Meandering along the banks of the famous Thredbo River, riders can maintain flow undulating through open grasslands and thick eucalyptus forests. Ride From Thredbo to Jindabyne: The newly opened lower Thredbo Valley Track extension for the more experienced rider adds 15km to the trail from Lake Crackenback to Gaden Trout Hatchery, riders can extend further by joining the Hatchery Bay trail which continues onto Jindabyne.



Supporting Infrastructure

Bespoke retail	Thredbo Retail Valley Terminal
General Retail	Main commercial centre Jindabyne 35km, Summer retail, accommodation facilities available in Thredbo and Crackenback including restaurants, bars and takeaway outlets
Accommodation	Thredbo Alpine Hotel 3.5 star, Commercial Lodges e.g.: Boali Apartments e.g.: Lantern, Club Lodges: Kiama Commercial accommodation e.g.: Candelight Lodge, Denman, House of Ullr Private Chalets e.g.: Ski in Ski out, Backpackers e.g.: YHA
Food service providers	30 places to relax, sip and dine in Thredbo, including cosy bars, late night spots and dining options ranging from à la carte, café style, casual bistro, tapas, BBQ or grab and go
Main access roads	Canberra 214kms, Sydney 494kms Alpine Way from Jindabyne to Thredbo to Khancoban to Hume Highway to Melbourne. Monaro Highway from Canberra to Jindabyne Snowy Mountains Highway from Bega to Cooma. Hume Highway Sydney to Canberra
Future plans	Free TVT Shuttle Bus Improved trail from Crackenback to Jindabyne linking up with the existing Hatchery track and Mill Creek track \$27 million in funding from the NSW Government that will be spent developing walking and mountain biking trails in the region, which includes the finishing of the Thredbo Valley Track to Jindabyne



Rotorua, New Zealand

One of the oldest mountain bike networks in the country, with master crafted trails, unbeatable riding surfaces, well-draining volcanic soils, varying topography and fantastic scenery. It is no wonder Rotorua is renowned among mountain bikers as a premier riding destination. With around 130km of continually evolving trails, there is something to cater for all levels of rider, from beginners and family groups through to experts looking for extreme action.

Skyline Rotorua is home to New Zealand's first all-season Gondola assisted bike lift park, accessing world-class downhill mountain biking. Skyline MTB Park gives riders easy access to a 12-kilometre trail network featuring trails with varying terrain for all ability levels.

Twenty-five years and 160kms of trails later, Rotorua has become synonymous with mountain biking, turning the sport into a multimillion-dollar industry for the city.

The economic value of mountain biking in Rotorua was last estimated at \$13.5 million per annum.

Area Profile

Elevation: 280 m

Population Profile

Population: 75,100

Visitor Profile

Trail visitors: estimated 500,000 annual visitors to Rotorua trails

Trail Specific Infrastructure

- | |
|--|
| <ul style="list-style-type: none"> HORSE: Bridle Trail 30mins - Tokorangi Pa Lookout Trail 1–1.5hrs - Katore Wash Trail 2–2.5hrs, Radio Hut Lookout Trail 1–1.5hrs Planned 80km network costing \$3.1 million 2017 start of Enduro World Series |
|--|

Supporting Infrastructure

Bespoke retail	4 MTB specific sales/rentals
General Retail	Range of retail options
Accommodation	Range of accommodation options
Food service providers	164 restaurants
Other	Features therapeutic hot mud pools, dramatic geysers 2,000 feet on the Skyline Gondola for views of Lake Rotorua, then zip back down to explore the lake by paddle steamer, fishing charter or WWII amphibious vehicle.

YOU ARE HERE
All tracks start here. Follow the colour coded arrows in the direction they are pointing.

Whakarewarewa Forest – Rotorua, NZ

Walking track classifications and track types

Choose a track that suits your fitness level and the experience you're after. Times are estimated at an easy going walking pace.

Track Name	Time	Distance
Mokopuna Trail	1hr	3.6 km
Redwood Memorial Grove Walk	30min	2 km
Waitea Walk	1hr	3.4km

Extended walk suitable for relatively inexperienced people with low level of backcountry skill. Some fitness required.

Track Name	Time	Distance
Quarry Track	1hr 30min	4.8 km
Pohatuwa Track	2hrs	7.5km
Tokorangi Pa Track	3hrs 30min	11.5km

WALKING TRACKS

Trails built and managed by Rotorua Trails Trust. Join and donate.

Key

- Parking
- Bus stop
- Information
- Toilets
- Tap water
- Geothermal feature
- Lockout
- Picnic area
- Map sign board
- Onsite bike hire

- Structure
- Picnic Area
- Highway
- Sealed road
- Metal road
- Dual use
- Biking only tracks
- Horse only tracks
- Carpark - Redwoods Rotorua
- Carpark - Mountain Biking

Forest Care Code

The Whakarewarewa Forest is primarily a productive plantation forest where all facets of the forestry management cycle can be seen from time to time. However the forest is also a place where people can enjoy and explore the forest environment through various recreational activities. So that everyone has a safe and enjoyable experience, please respect the code below:

- There are tracks specifically designed just for walkers, for bikers and for horses. Keep to your dedicated tracks.
- Forestry roads are multi-use. Beware of forestry vehicles using the roads.
- Keep left unless passing. Slow down and communicate when passing others.
- Obey all forestry signage. Tracks and roads may be closed or diverted at any time for maintenance, forestry operations or safety reasons.
- NEVER light fires.
- Remove rubbish and keep streams and lakes clean.
- Protect plants and animals.
- Respect our cultural heritage.

Important Information

- First Aid is available from The Redwoods I-SITE Visitor Information Centre on Long Mile Rd, contact + 64 7 3500110 or from Mountain Bike Rotorua on Waipa State Mill Rd contact + 64 7 3484295 or 0800 682 768.
- The emergency telephone number in New Zealand is: 111. This can be dialled free from any phone.
- Main access gates to the car parks are open: 5.30am to 8.30pm at the entry to The Redwoods on Long Mile Rd. 6.00am to 8.30pm at the entry to the Rotorua Mountain Bike carpark on Waipa State Mill Rd.
- There is no vehicle access into the forest for the general public.
- Please read signs located at main access points and within the forest for additional information and safety notices.

Dial 111 in an emergency

the Redwoods
WHAKAREWAREWA FOREST
www.redwoods.co.nz

Find us on Facebook

Want to know more detailed information about the forest and walking tracks - like history, flora & fauna, track descriptions? You'll find everything you need to know at www.redwoods.co.nz

LUCID ECONOMICS

36

PAGE LEFT INTENTIONALLY BLANK



Lucid Economics Pty Ltd

www.lucideconomics.com.au

info@lucideconomics.com.au