

Bike tourism opportunities
in Queensland

Supplementary report:

Mountain Biking



Supplemental to *Bike Tourism in
Queensland — Research Report*



Queensland
Government

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Key bike tourism opportunities

Bike tourism – or bike riding on leisure trips – is a popular activity enjoyed by many, and can be a powerful reason to choose to visit a destination. Bike riding also delivers a more positive in-destination experience for visitors, leading to repeat visitation and recommendations to family and friends.

There are many types of bike riding, however there are four key opportunities for Queensland:

<p>Trail riding</p> 	<p>Riding a dedicated path or trail through a scenic location. The surface – paved, dirt, gravel – doesn't matter, as long as it is separated from traffic. Includes single day and multi-day rides.</p> <p><i>Example: Brisbane Valley Rail Trail</i></p> <p>588,000 adults went trail riding while on a trip in the last 12 months.</p>
<p>Mountain biking</p> 	<p>Riding bikes on single off-road tracks, usually graded green (easiest) through to double black (extreme).</p> <p><i>Example: Nerang National Park Trails</i></p> <p>177,000 adults went mountain biking while on a trip in the last 12 months.</p>
<p>Holiday riding</p> 	<p>Casual bike riding experiences, usually done spontaneously. Holiday riding is an activity done in a destination.</p> <p><i>Example: Riding along the Cairns Esplanade</i></p> <p>1.2 million adults went holiday riding while on a trip in the last 12 months.</p>
<p>Road cycling</p> 	<p>Riding road bikes on the road.</p> <p><i>Example: The Gap to Mount Glorious (via Mt Nebo)</i></p> <p>323,000 adults went road cycling while on a trip in the last 12 months.</p>

Note: Individuals can participate in multiple types of riding.

This report supplements *Bike Tourism in Queensland – Research Report*. It provides detailed data about the mountain biking market, traveller motivations and behaviours.







Mountain biking

- Mountain biking is more than just something fun done on holidays. Mountain bikers do it on the weekends and would like to do more. It has its own sub-culture and language, and people identify as mountain bikers.
- The vast majority of mountain bike travel is recreational. Some are travelling to participate in events, however this is the minority.
- Ideal mountain bike destinations have reached a 'tipping point' of sufficient volume of high quality trails, scenery, supporting experiences, and a mountain bike culture.
- Even for die-hard enthusiast mountain bikers, destinations need to offer more than just great riding.
- Destinations aiming to attract visitors from interstate markets need to tick all the boxes. Once travel becomes a factor, the competitive set expands to all top-tier destinations in the region.
- Shorter-drive distances have lower standards, however driving for overnight visitation requires being a 'mountain bike destination' not just a trail network.
- Great, not just good, mountain bike experiences are also important for driving repeat visitation and future growth through recommendations.
- Reputation is critical for driving destination choice. Reputation is driven by word of mouth, social media, bike media and events.
- Blue (moderate) trails are the most popular among mountain bike travellers. However, almost half enjoy riding black (difficult) trails. This is even higher among interstate mountain bike travellers, highlighting the need for more advanced trails to motivate people to travel.





What is the market?

Mountain biking

 Biked on a trip (# adults)	177,000
 Day trip (50+km) expenditure	\$350 million
 Overnight visitor expenditure	\$310 million

 Queensland market	Number of trips	Overnight visitor expenditure
Queenslanders in Queensland	71,000	\$28 million
Queenslanders travelling interstate	26,000	\$40 million
Interstate visitors to Queensland	14,000	\$21 million

AVERAGE SPEND PER PERSON PER NIGHT
 \$64 intrastate \$118 interstate

	 Day trips (50+km)	Overnight trips		
		 Intrastate	 Interstate	 Overseas
Participation (% of population)	1.1%	0.5%	0.4%	0.2%
Participation (# people)	156,000	73,000	57,000	26,000
Average # of trips	10.6	1.83	0.66	0.30
Total # of trips	1.9M	324,000	117,000	52,000
Average spend per trip	\$186	\$401	\$1,548	n/a

4.3 million people

people find mountain biking appealing (29% of adults)

This includes **870,000** who find it very appealing



Who is the market?

Profile of mountain bikers



Intrastate travel 83%
Interstate travel 59%



Intrastate travel 17%
Interstate travel 37%

Age Total	Total	Intrastate	Interstate
18 to 24 years	3%	1%	3%
25 to 29 years	7%	5%	3%
30 to 34 years	8%	9%	12%
35 to 39 years	13%	3%	12%
40 to 44 years	16%	28%	11%
45 to 49 years	13%	18%	14%
50 to 54 years	13%	13%	12%
55 to 59 years	12%	3%	17%
60 to 64 years	8%	19%	9%
65 to 69 years	6%	0%	9%
70+ years	1%	0%	0%

Household structure	Total
Living alone	10%
A couple with children at home	36%
A couple without children at home	38%
Single with children at home	3%
Shared household of adults	7%
A shared household of family	4%
Other	0%



- Result is significantly below the total
- Result is significantly above the total


* High Value Travellers engage in domestic leisure (holiday or visiting friends and relatives) travel, spend more than average on leisure trips, and are interested in the type of leisure experiences Queensland has to offer.


Please note if percentages do not add up to 100% it is due to rounding, not missing responses.

Household income	Total	Intrastate	Interstate
Under \$49,999	10%	10%	12%
\$50,000 - \$59,999	1%	1%	0%
\$60,000 - \$69,999	4%	0%	5%
\$70,000 - \$79,999	6%	12%	5%
\$80,000 - \$89,999	4%	1%	4%
\$90,000 - \$99,999	7%	6%	8%
\$100,000 - \$109,999	11%	15%	13%
\$110,000 - \$119,999	5%	1%	0%
\$120,000 - \$129,999	9%	8%	12%
\$130,000 - \$139,999	4%	2%	0%
\$140,000 - \$149,999	5%	2%	1%
\$150,000 - \$199,999	19%	25%	19%
\$200,000 - \$249,999	9%	2%	13%
\$250,000+	7%	13%	8%
Prefer not to say	0%	2%	0%

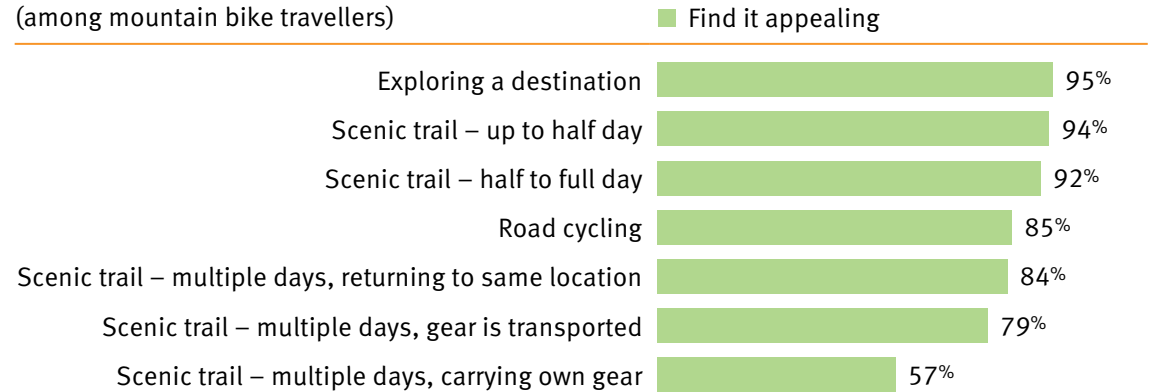
Understanding the market

Frequency of riding bikes	Mountain bike ride	Bike ride
More than once a week	38%	73%
Once a week	19%	12%
A few times a month	17%	9%
About once a month	7%	1%
Once every two to three months	9%	4%
Less often	10%	0%





 More than one in two are mountain biking at least once a week. However, many are less-frequent mountain bikers – one in five are riding less often than once a month. Most are riding bikes frequently, if not mountain biking.

 Blue – or moderate – trails are the most popular among mountain bike travellers. However, almost half enjoy riding black – or difficult – trails. This is even higher among Interstate mountain bike travellers, highlighting the need for these trails when motivating travel.

Appeal of different types of riding (among mountain bike travellers)



Trails enjoyed

 Easy	All mountain biking travellers	51%
	Intrastate travellers	62%
	Interstate travellers	44%
 Moderate	All mountain biking travellers	79%
	Intrastate travellers	79%
	Interstate travellers	83%
 Difficult	All mountain biking travellers	48%
	Intrastate travellers	41%
	Interstate travellers	61%
 Extreme	All mountain biking travellers	13%
	Intrastate travellers	23%
	Interstate travellers	11%

□ Result is significantly above the total

Where do they travel?

Destination of last trip

	Intrastate	Interstate
Queensland	25%	12%
New South Wales	41%	30%
Victoria	34%	12%
South Australia	-	1%
Western Australia	-	3%
Northern Territory	-	0%
Tasmania	-	17%
Canberra and ACT	-	25%

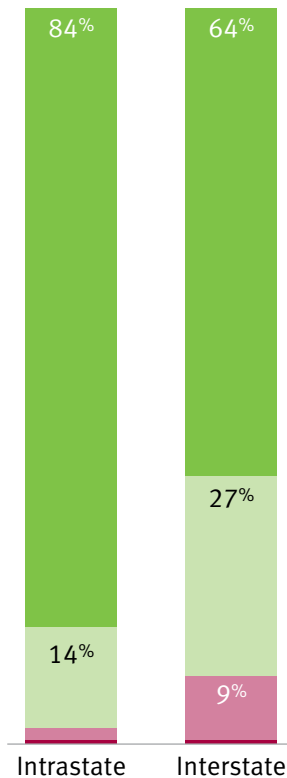
How they choose where to travel


Reputation is critical.

Travellers are not actively researching “mountain bike holidays”. They know where they want to go.

Mountain bikers find out about the best destinations through word of mouth, bike media, social media and events. The importance of reputation further emphasises the need for not just good, but great, mountain biking experiences.

Impact on destination choice



 Mountain biking was a key reason for choosing to visit a destination in almost all intrastate trips, and 9 in 10 interstate trips.

- Key reason for visiting that destination
- Did influence decision to visit
- Knew about, but did not influence decision to visit
- Did not know about beforehand

“ If everyone is bigging it up as the best place to go, I want to go there.”

– Focus group respondent



How do they travel?

Total number of nights away on trip

	Total	Intrastate	Interstate
1 night	18%	35%	10%
2 nights	22%	47%	10%
3 nights	19%	14%	21%
4 nights	7%	0%	10%
5 nights	6%	0%	10%
6 nights	6%	1%	9%
7 to 13 nights	18%	3%	26%
14 nights or more	4%	0%	5%

Travel mode

	Total	Intrastate	Interstate
Fly	21%	3%	29%
Drive	70%	82%	65%
Other	9%	15%	6%

□ Result is significantly below the total

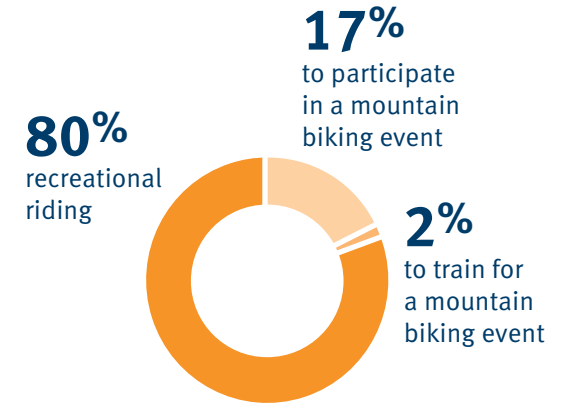
□ Result is significantly above the total

Total number of days biking

	Total	Intrastate	Interstate
1 day	10%	17%	6%
2 days	33%	49%	26%
3 days	23%	30%	19%
4 days	12%	1%	17%
5 days	7%	0%	10%
6 days	7%	0%	10%
7 to 13 days	7%	2%	9%
14 days or more	2%	0%	4%

Travel party

	Total	Intrastate	Interstate
Solo trip	22%	19%	17%
Partner / spouse	30%	33%	38%
Children under 18	14%	13%	18%
Children over 18	5%	0%	6%
Other family	8%	7%	6%
Friends	46%	55%	53%
Colleagues	1%	0%	2%
Other	3%	0%	3%



The vast majority of mountain bike travel is for recreational riding, rather than event participation and training.



What makes a successful destination?

An ideal destination will tick *all the boxes*

- ✔ Volume of trails (80-100km+)
- ✔ Variety of trails
- ✔ Trails of varying difficulty – need challenging riding
- ✔ Scenery
- ✔ Culture
- ✔ Accommodation and retail
- ✔ Food and beverage
- ✔ Different riding experiences; can't be more of the same
- ✔ Other experiences (more than just biking)

To attract visitors, a destination must reach a 'tipping point', where it has sufficient volume of high quality trails AND the other elements. Shorter-drive distances have lower standards, however once people need to travel, the destination is competing against all top-tier destinations.

“ I could go and I could pay for a flight to Queenstown, which includes a bike, for the same price as it costs to go to Queensland.

– Focus group respondent

“ It's not just the infrastructure but the culture. Bike friendly. Bike shops so if you break a chain you can get it fixed right away. Everyone at the pub is into mountain biking. Makes a huge difference to your experience.

– Focus group respondent

Impact of good vs. great experiences

