

Bike tourism
opportunities
in Queensland

Bike Tourism in Queensland

Research Report



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Executive summary

Bike tourism is a large and growing sector, internationally and domestically.

In 2018, the Queensland Government commissioned research to better understand the current and potential market for bike tourism in Queensland. The research involved:

- analysis of existing research reports
- in-depth interviews with key stakeholders from government, tourism and bike industry organisations
- qualitative consumer focus groups, followed by quantitative online surveys.

The research explored four key types of bike tourism – trail riding; holiday riding; mountain biking; and road cycling. It revealed bike tourism has broad appeal – more than 9 million adults enjoy riding bikes on holidays, including 2.75 million who *love* riding bikes on holidays.

The economic upside of bike tourism is well documented. Globally, the bike tourism industry is estimated to be worth more than \$140 billion a year¹.

While overnight bike tourism visitor expenditure within Queensland for domestic travel by residents of Queensland, New South Wales and Victoria for the year ending November 2018 was \$432 million, expenditure in other states was \$1.18 billion – a significant missed opportunity for Queensland. This spending was driven by more than one in 10 adults who rode a bike on either an overnight trip or a day trip more than 50km from home.

Our world has changed dramatically since 2018 as a result of COVID-19, however the opportunities for bike tourism in Queensland remain strong. In the last two years, Australians have increasingly sought out unique travel experiences on home soil; participation in bicycle riding increased too.

Shifts in consumer travel wants and needs towards more experiences in nature and a focus on safety and security, will continue to drive demand for domestic travel. Queensland destinations have a prime opportunity to capitalise on market demand for bike tourism experiences.

The research identified significant unrealised potential for bike tourism in Queensland based on latent demand and strong support among destinations to focus on the market.

There is substantial room for growth across all four bike tourism types, but off-road experiences will have the broadest market appeal and deliver more positive visitor experiences.

Half, single and multi-day trail riding experiences, along with mountain biking experiences, are priority development opportunities for Queensland.

Whatever the type of bike tourism experience, destinations must deliver great—not just good—experiences to maximise repeat visitation and referrals.

Bike tourists want experiences that are hassle-free, supported by a biking culture, easy to find and reassuring information, and offer more than just bike riding. Authentic complementary experiences that fit the destination are critically important.

To realise the potential of these opportunities, key priorities for Queensland are to:

- establish a policy framework to shape the development of bike tourism in Queensland
- actively support developers of bike tourism with information and advice
- identify and implement new signature Queensland bike tourism experiences
- actively promote bike tourism in Queensland, including special events.

Successfully developing and growing bike tourism in Queensland will also rely on a clear governance model; engaged local communities; destination branding; and leveraging events.

Disclaimer: The research summarised in this report was completed prior to the events occurring as a result of the COVID-19 pandemic. The possible legacy effects COVID-19 may have on bike riding and tourism opportunities in Queensland have not yet been fully considered. It is acknowledged that such legacy impacts will need to be addressed as part of implementation of recommendations and future initiatives.

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This report is part of a suite, which also includes supplementary reports providing a more detailed breakdown of the market associated with each type of bike tourism: Trail riding; Mountain biking; Holiday riding; and Road cycling.



Introduction

Bike riding is an excellent way to experience the outdoors and is accessible to people of all ages, abilities and social backgrounds. It also is becoming one of the fastest growing types of outdoor recreation and tourism nationwide.

Queensland’s idyllic weather allows domestic and international visitors to ride at any time of year. These visitors contribute significantly to our economy, using accommodation, visiting local attractions and buying goods from local shops.

Getting more people riding more often as a mode of transport, for recreation and tourism, will help power Queensland’s economy and revitalise local communities.

In 2018, the Queensland Government commissioned research to better understand the current and potential market for bike tourism in Queensland.

This report and accompanying supplementary reports present the key research findings to support government and industry to:

- understand what makes bike destinations appealing to potential visitors
- make more informed decisions about bike tourism opportunities

- better evaluate potential return on investment of bike tourism opportunities
- demonstrate to others the opportunities associated with bike tourism
- identify processes to support the development and marketing of bike tourism.

Completion of this research and publication of these reports deliver on:

- Action 4.8 in the *Queensland Cycling Action Plan (QCAP) 2017–2019*
- Action 4.7 in the *QCAP 2020–2022*.

By reading this report you will understand:

- what is bike tourism
- what is the market, and what is the market in Queensland
- what the market wants
- what are the opportunities for bike tourism in Queensland
- the success factors for developing bike tourism in Queensland.



What is bike tourism?



What is bike tourism?

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

While a number of types of bike riding experiences exist, the following four types of bike tourism were prioritised for exploration in the research due to the scale of the opportunity and their fit with Queensland’s natural environment:

- trail riding
- mountain biking
- holiday riding
- road cycling.


There is significant cross-participation with bike tourism experiences, with many individuals engaging in multiple types. There is also overlap in the opportunities and challenges for each type of bike tourism experience.

The individual attitudes, needs and market potential of each individual type of bike tourism are explored in further detail in the supplementary report for each type.

The terms 'bike tourism', 'bike riding' and 'bike riders' are used throughout this document. This is to reflect the everyday language used by the market, who do not describe these activities as ‘cycling’, and do not refer to themselves as ‘cyclists’. Minimising use of the term cyclist makes bike tourism more accessible to recreational leisure travellers. The exception is when describing ‘road cycling’ and ‘road cyclists’, as these terms are commonly used by this group.


The term 'bike tourism experiences' has been used instead of products or assets. This is because bike riding is one component of a broader experience. It also reflects the trend of travellers seeking experiences, and the industry’s focus on developing them.

Trail riding




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.
Example: Brisbane Valley Rail Trail

Holiday riding




Casual bike riding experiences, usually done spontaneously. Holiday riding is an activity done in a destination but is not typically top of mind when choosing a destination.
Example: Riding along the Cairns Esplanade

Mountain biking



Riding bikes on single off-road tracks, usually graded green (easiest) through to double black (extreme).
Example: Nerang National Park Trails

Road cycling



Riding road bikes on the road, usually for fitness or recreation.
Example: The Gap to Mount Glorious (via Mt Nebo)

Note: Individuals can participate in multiple types of riding. All data is travel by Queensland, New South Wales and Victorian residents in the year ending November 2018



Trail riding

Trail riding is riding a dedicated path or trail through a scenic location. The surface – paved, dirt, gravel – is not important, but it must be a trail that is separated from traffic.

- Trail riding experiences have broad appeal and large participation numbers. The low barrier to entry, being able to ride a bike, makes it appealing to many.
- Single day trail rides are impacting where people travel – there is strong enough appeal that travellers are choosing destinations to do these rides. Single day rides also impact future visitation through likelihood to recommend and likelihood to return to a destination.
- Multi-day trail rides are also driving destination choice and likelihood to recommend, however these appeal to fewer people than single day rides.
- Rail trails are a common trail riding experience, however the opportunity is much broader – any path or trail through a scenic location could deliver to the same consumer needs.

What makes a successful destination?

While the bike riding is important, it is just one component of a much broader experience. Trail experiences that offer all the following elements will be more successful at motivating travellers.

Within these features, there’s no magic formula for what makes a special trail riding experience – it depends on the opportunities of the specific destination. Ultimately, they should be authentic to the destination.

An ideal destination will tick *all the boxes*

- ✔ Scenery – Landscapes, nature and wildlife; city experiences with views can also work
- ✔ Things to stop and see – Points of interest, landmarks
- ✔ Things to do – Swimming, walks, picking fruit, cultural, educational and children's activities
- ✔ Food and beverage – Cafes, bakeries, restaurants, farm fresh, wine, beer and other drinks
- ✔ Variety – Across all the scenery, experiences, and food and beverage; becomes more important the longer the trail to avoid monotony and boredom

588,000 adults
went trail riding while on a trip in
the last 12 months

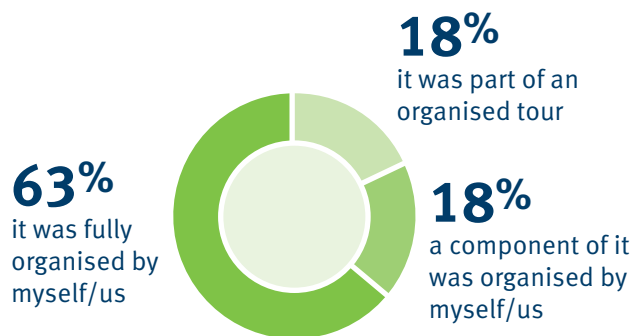
9 million people
find single day trail riding appealing
(61% of adults)

This includes **3.2 million**
who find it very appealing

5.4 million people
find multi-day trail riding appealing
(36% of adults)

This includes **1.6 million**
who find it very appealing

Trip planning and organisation



Note: Where percentages do not add up to 100%, it is due to rounding.

Mountain biking



Mountain biking is riding bikes on single off-road tracks, usually graded green (easiest) through to double black (most difficult).

- 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, its own language, and people identify as mountain bikers.
- 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 travellers, highlighting the need for more advanced trails to motivate people to travel.
- Great, not just good, mountain bike experiences are also important for driving repeat visitation and future growth through word of mouth recommendations.
- Even for die-hard enthusiast mountain bikers, destinations need to offer more than just great riding.
- This is also important for attracting visitors from interstate markets or driving for overnight visitation. Once people need to travel, the destination is competing against all top-tier destinations.

177,000 adults
went mountain biking while on a trip in
the last 12 months

4.3 million people
people find mountain biking
appealing (29% of adults)

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

What makes a successful destination?

To attract visitors, a destination must reach a ‘tipping point’, where it has sufficient volume of high-quality trails, scenery, supporting experiences, and a mountain bike culture.

Reputation is critical for driving destination choice, and it is driven by word of mouth, social media, bike media and events.

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

17%

to participate in a
mountain biking event

80%

recreational
riding

2%

to train for
a mountain
biking event



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



Holiday riding

Holiday riding is casual bike riding experiences, usually done spontaneously. Holiday riding is an activity done in a destination.

- The experiences enjoyed by holiday riders can overlap with trail riding experiences.
- Holiday riding can have a strong positive impact on the overall experience in a destination. More than 75% of holiday riders had a better time in a destination as a result of the bike riding.
- Almost one third of holiday riding experiences were had overseas. There is a significant gap in participation on domestic holidays compared to overseas holidays.
- Australian destinations, in particular Queensland, lag international destinations at delivering great experiences. A key barrier is the ease of finding out information about the ride.
- Holiday riders are not necessarily enthusiast bike riders. One in four ride a bike a couple of times a year at most, and many only do so when on holidays.

What makes a successful destination?

Holiday riding experiences can grow destination visitation, both directly (likely to visit) and indirectly (likely to recommend).

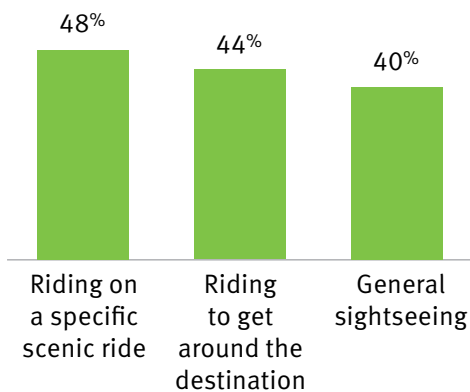
To directly grow visitation, travellers must know about the experience in advance, so it can influence destination choice. Only great experiences will influence destination choice. These experiences will encourage people to choose a destination, deliver a better overall experience in the destination, and grow promotion through positive word of mouth.

An ideal destination will tick *all the boxes*

- ✔ Tourism marketing of specific scenic rides
- ✔ Easy to find detailed information about where to ride
- ✔ Quality infrastructure
- ✔ Bikes easily available
- ✔ Things to see and do

1.2 million adults
went holiday riding while on a trip in
the last 12 months

Purpose of holiday rides



Road cycling

Road cycling is riding road bikes on the road.

- Road cycling is more than just something fun to be done on holidays. More than five in six are cycling weekly and would like to do more. It has its own sub-culture, its own language, and people identify as road cyclists.
- Even among road cyclists, vehicles are an issue. One in three cited traffic and safety fears on their last trip.
- Road cyclists have strong interest in other types of riding, particularly trail riding. Destinations will be able to attract these same visitors with trail riding experiences.
- It is a very attractive and valuable market, driven by large participant numbers and high average spend.

What makes a successful destination?

Road cyclists will consider Australian destinations for their travels, however no one single destination dominates.

There is a gap in the market for a strong road cycling destination. The biggest challenge is destination development.

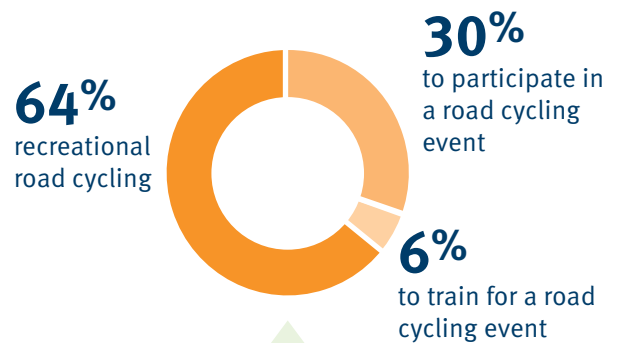
An ideal destination will tick *all the boxes*


- ✔ Quality infrastructure – smooth, debris clear roads
- ✔ Wide shoulders
- ✔ Minimal traffic – ideally secondary roads and not major thoroughfares
- ✔ Scenery
- ✔ Complementary experiences – especially food and wine
- ✔ Positive cycling culture

323,000 adults
went road cycling while on a trip in
the last 12 months

4.5 million people
find road cycling appealing
(30% of adults)

This includes **1.1 million**
who find it very appealing



 More than one in three road cycling trips are directly related to participating or training for an event.

Why do travellers choose bike tourism?

Bike tourism experiences ignite a strong emotional response from travellers. There is a genuine passion for bike tourism experiences. Bike tourism meets key emotional needs that travellers seek, making it a powerful motivation to choose a destination, and a strong contributor to a positive visitor experience.

| Emotional need | Description | Quotes from bike travellers (focus group participants) |
|-----------------------------|---|---|
| Exploration | Ability to travel further than walking and connect better with the destination than in a vehicle. | “Exploring the unknown, I can’t sit in a resort for a week or even a campsite. What else is out here? Is there a creek or a path that goes somewhere?” |
| Connection | Social connection with the travel party (camaraderie, competition, togetherness). | “It is all about memories and creating experiences. You look back and think of the good things you’ve done together and experienced.” |
| Adventure | Getting out and doing something exciting and different. | “Adventure, connection to nature, culture, meeting people who are interested in that. Having a group or crew who do it together. Fitness, fun, thrill.” |
| Challenging yourself | Sense of accomplishment from challenging yourself. | “Sense of achievement. I like that word. Open minded to go to different destinations and experience new things.” |
| Freedom | Freedom to do what you want, when you want and how you want. | “Freedom. Ride as hard as I like, or take it easy. If I’ve got half a day set aside it’s just up to me.” |
| Escapism | Escaping the crowds, the mundane, the everyday hustle and bustle. | “It’s an emptiness of mind. Nothing to think about but what you’re taking in, within yourself.” |
| Relaxation | Even when challenging, there’s a feeling of relaxation. Clears the mind. | “It’s a relaxing ride where you can take your time, enjoy the scenery and enjoy the trip rather than dodging cars and all that kind of thing.” |



What is the market?



What is the market?

Bike tourism is a large, growing sector. The economic upside of bike tourism is well documented. Globally, the bike tourism industry is estimated to be worth more than \$140 billion a year¹. At the same time, the number of recreational bike riders is rapidly growing in car-oriented countries such as the United States, Canada, and Australia, suggesting the trend will continue².

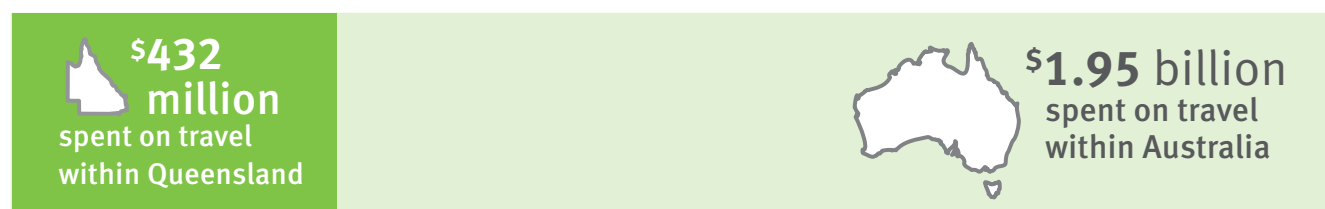
The total overnight visitor expenditure for domestic travel by residents of Queensland, New South Wales and Victoria was \$1.95 billion for the year ending November 2018. This spending was driven by the more than one in 10 adults who rode a bike on a trip in the last 12 months – either an overnight trip or a day trip where they travelled more than 50km from

home. Bike tourism experiences have broad appeal – more than 9 million adults enjoy riding bikes on holidays, including 2.75 million who *love* riding bikes on holidays.

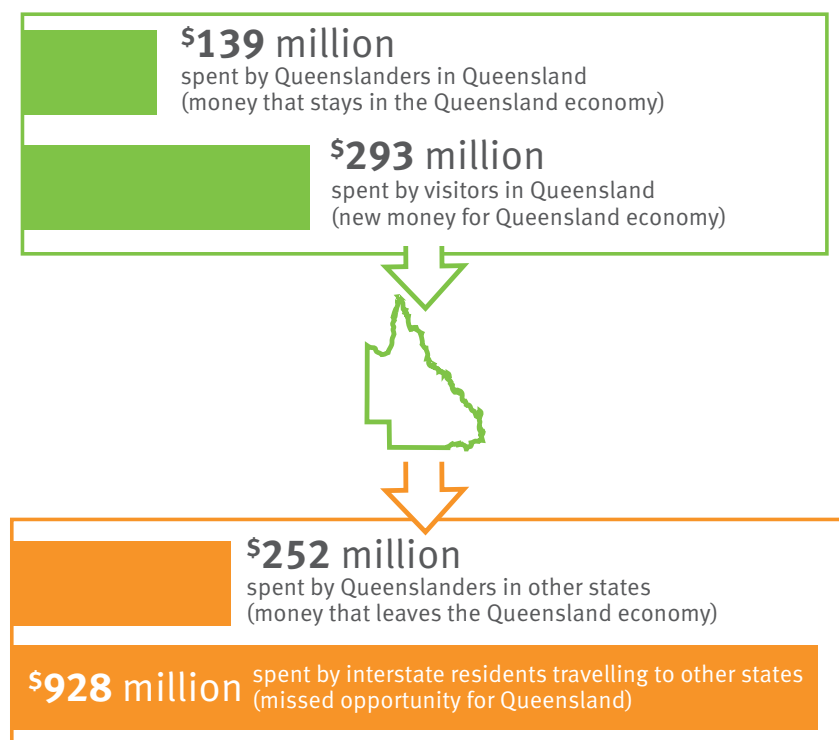
While large and growing, bike tourism remains niche relative to the broader tourism industry. The \$140 billion bike tourism industry represents just 2% of the \$7.4 trillion³ global travel economy. Other estimates put the industry at 2% to 4% of the total global tourism sector⁴. Domestically, total overnight visitor expenditure is \$67.5 billion⁵, placing estimated domestic overnight bike tourism at approximately 3% of the sector.

Bike tourism’s niche status should be considered when developing growth strategies.

Overnight bike tourism visitor expenditure



Overnight bike tourism visitor expenditure includes



Note: the \$1.95B overnight visitor expenditure also includes \$338 million spent by residents of New South Wales and Victoria travelling within their respective state that is not shown in the chart. Note that when interpreting the overnight visitor expenditure figures, adults may have participated in multiple types of riding. All data is travel by Queensland, New South Wales and Victorian residents in the year ending November 2018.

46% of adults say they enjoy riding bikes on holidays

but only

10% of adults rode a bike on a trip in the last year.

What is the demand?

Almost half (46%) of adults enjoy riding bikes on holidays (equivalent to 6.8 million people). Even among those that haven't ridden a bike on a trip in the last 12 months, more than one in three enjoy bike riding on their holidays. Scenic trail rides for less than four hours have the broadest appeal. This is a direct result of the low barrier to participation – simply being able to ride a bike is enough to enjoy. There is an opportunity to grow tourism with more recreational experiences such as shorter, scenic trail rides and by encouraging travellers to explore destinations by bike.

Single day trail riding

9 million find it appealing

563,000 rode a bike on a trip



Multi-day trail riding

5.4 million find it appealing

96,000 rode a bike on a trip



Road cycling

4.5 million find it appealing

323,000 rode a bike on a trip



Mountain biking

4.3 million find it appealing

177,000 rode a bike on a trip



Note: Individuals can participate in multiple types of riding. All data is travel by Queensland, New South Wales and Victorian residents in the year ending November 2018.

Despite more than 6.8 million adults stating that they enjoy bike riding on holidays, only 1.5 million rode a bike on a trip in the year ending November 2018 (around one in 10 adults). To realise the latent demand, destinations need to develop more appealing experiences and promote those experiences. At the same time, reducing barriers to participation such as lack of information and lack of supporting experiences will enable more potential travellers to convert. Converting even just a small portion of those who find the experiences appealing into active participants can deliver significant growth.



What does it mean for the tourism industry?

Bike tourism aligns with key current tourism industry trends. Key trends include:

- **Active and adventure tourism**

In a shift away from simply ‘being a tourist’ and ‘sightseeing’, travellers are looking to get out and do activities that are fun, active and adventurous.

- **Nature-based experiences**

Travellers seek experiences that allow them to spend time in nature, including connecting with the natural environment. Bike riding delivers this better than driving, and it allows a traveller to see more of a destination than travelling by foot.

- **Ecotourism**

Travellers seek ecologically sustainable experiences with a focus on conserving the natural environment and embracing cultural values. Bike riding is an environmentally friendly way of exploring a destination.

- **Escaping crowds**

Travellers are seeking experiences that allow them to escape the crowds. Bike trails are rarely as busy as roads. A bike also allows travellers to explore further than those on foot.

- **“Insta-worthy” moments**

Travellers seek unique and iconic experiences that make for quality pictures for posting on social media. Bike trails can take travellers to scenic locations that translate into great photographs.

This alignment is a key reason for the increased popularity of bike tourism – both why more travellers are seeking these experiences, and why more destinations are investing in developing them.

It also ensures that bike tourism experiences will continue to resonate with travellers and supports developing bike tourism. In addition to developing new experiences, there is an opportunity to leverage bike riding to align existing experiences with current trends.



Potential beyond direct visitation

The potential for bike tourism extends beyond direct visitation. Even if visitors aren't choosing a destination specifically for bike riding, research reveals simply going for a ride delivers a more positive experience. This ultimately leads to a higher likelihood to return to a destination and higher likelihood to recommend that destination to their friends and family.

Among travellers who went bike riding on holidays (but didn't travel for that purpose), 75% had a more positive overall experience in the destination. Great bike riding experiences have an even stronger impact – 96% of travellers had a more positive overall experience in that destination when the bike riding experience was 'very satisfying'.

In addition, almost all travellers that had a great bike riding experience would recommend that experience to others – ultimately driving future visitation for the destination.

Bike tourism is becoming a greater focus for destinations, internationally and domestically. The niche status of bike tourism means it has been overlooked as a priority for destinations to develop. However, Australian states have started focusing on the development of bike tourism experiences, with South Australia, Victoria and Tasmania releasing growth strategies.

As the opportunity increases, the focus will grow the bike tourism sector as more people become engaged with biking and more people actively seek bike tourism experiences. But this greater focus will create challenges too – increasing competition and an increasing standard of experience required to attract visitors.



What are the benefits of bike tourism?

- **Spend is distributed across sectors and rarely concentrated with one business**

Bike tourism spending is distributed across all sectors of the economy, including accommodation, retail, food and beverage and transport. In addition, as the bike tourism experience is usually public and free to use, expenditure is rarely concentrated with a single business or organisation. This also prevents single organisations from capturing secondary expenditure, such as food, beverage and retail, that often occurs around large tourism attractions.

- **Experiences can be developed without competing with existing tourism businesses**

Unlike the development of large tourism attractions, bike tourism infrastructure is not usually accompanied by large scale new accommodation, food and beverage and retail outlets. For this reason, bike tourism experiences are complementary to, rather than competition for existing businesses.

- **Can create destinations by linking attractions**

Rail trails and similar end-to-end bike tourism experiences can be used to link multiple, smaller destinations to create one larger tourism destination. This combined tourism attraction provides a more compelling reason to visit than any of the individual towns on their own. The Murray to the Mountains Trail is an example of a trail successfully linking small historic towns and gourmet food and drink establishments into one larger tourism experience.

- **Experiences can be developed at a local level**

With appropriate planning, investment and commitment, a destination can successfully develop bike tourism regardless of the reputation of the broader region or state. The reputation of the region can assist a destination in the development of bike tourism, however it is not dependent on it. Local bike tourism experiences are what drive perceptions of a state or region as a bike tourism destination, and not the other way around.

- **Leverages underutilised land assets**

When planned appropriately, bike tourism experiences can be developed without detracting from the primary purpose of those land assets. Examples include conversion of disused rail corridors into rail trails and development of mountain bike trails in forestry lands. Mountain bike trails have also been successfully built and

managed within protected lands, with minimal impact on the natural environment.

- **Experiences developed for bike tourism can also be enjoyed by the local community**

Investment in bike tourism infrastructure doubles as an investment in local community infrastructure, delivering positive experiences for residents as well as visitors. Community bike infrastructure can also be used for tourism, however a much higher quality is required for a bike experience to attract visitors. Bike tourism assets are also community assets, however not all community bike assets can serve as bike tourism assets.

- **Attracts tourists to regional communities**

Bike tourism has the potential to make an active contribution towards the economic revitalisation of regional Australia, as well as improve quality of life for its residents. Beyond economic factors, bike tourism can deliver personal, social and community benefits for regional locations. Bringing 'new faces' into small rural communities, enhancing social interaction and fostering a sense of pride and community identity are examples of the benefits^{6,7}.

Case study: Derby, Tasmania¹²

Derby, in north east Tasmania, has become the preeminent example of a struggling town revitalised through investment in bike tourism.

Since 2015, more than 80km of mountain bike trails have been built in the forests surrounding the town. The \$3.1 million in funding for the trails was enabled by a \$2.5 million Australian Government grant and supported by local government funding.

There are plans for further development of trails in the region, along with other attractions such as ziplines and water sports.

Highlights

- There has been an estimated return on investment of \$30 million per year.
- The trail network is attracting 30,000 visitors every year.
- Visitors are spending four to five nights in Derby, and another five nights elsewhere in Tasmania.
- New accommodation, food and beverage outlets and retail stores have opened in the town.

Case study: Otago Central Rail Trail¹³

The Otago Central Rail Trail (OCRT) remains one of the key bicycle tourism experiences in New Zealand. The rail trail officially opened in 2000, after extensive work by the OCRT Trust and the Department of Conservation. The trail offers rugged scenery, old historic gold mining villages, country pubs and various other experiences.

The key success of the trail was its influence on breathing life into a depressed agricultural area. When bike riders started using the trail facilities, they were very limited, but businesses started developing to meet demand.

Within a short period, bike hire businesses appeared, accommodation was developed, pubs and cafes started catering for increasing and discerning needs of bicycle tourists. The multiplier effect was significant for the area, as it brought investment and the associated demand for builders, painters and decorators, as well as marketing and digital media services.

In 2010, the success of the OCRT inspired the New Zealand government to develop the New Zealand Cycle Trails, a similar series of trails around the country.

Highlights

- By 2005, 53% of adjacent businesses attributed 60% of their turnover to the rail trail.
- The trail supported 121 full-time equivalent employees in 2011, up from 75 in 2008.
- International users comprised 39% of users in 2015, compared with 22% in 2011 and 20% in 2008.
- The number of visitors in 2017-18 was 14,392, an increase of 44% from 2008.



What is the market in Queensland?



What is the market in Queensland?

Almost half of Queensland adults say they enjoy riding bikes on holidays, however only one in ten are doing so. In the year ending November 2018, there were more than 280,000 overnight trips where Queenslanders went biking in Queensland and more than 188,000 biking trips to Queensland by interstate visitors. However, over the same period, interstate residents took more than 600,000 bike trips to states other than Queensland. There remains a large unrealised opportunity for Queensland, from existing and potential bike travellers.

One in 10
Queensland adults rode a bike on a trip

46% or 1.7 million
Queensland adults enjoy riding bikes on holiday

Domestic bike tourism spend

| | Number of trips | Expenditure |
|--|-----------------|----------------------|
| Queenslanders in Queensland – Overnight trips | | |
| Mountain biking | 71,000 | \$28,000,000 |
| Road cycling | 63,000 | \$38,000,000 |
| Single day trail | 122,000 | \$54,000,000 |
| Multi-day trail | 27,000 | \$19,000,000 |
| Total | 283,000 | \$139,000,000 |
| Queenslanders travelling interstate – Overnight trips | | |
| Mountain biking | 26,000 | \$40,000,000 |
| Road cycling | 43,000 | \$85,900,000 |
| Single day trail | 66,000 | \$85,800,000 |
| Multi-day trail | 24,000 | \$40,000,000 |
| Total | 159,000 | \$252,000,000 |
| Interstate visitors to Queensland – Overnight trips | | |
| Mountain biking | 14,000 | \$21,000,000 |
| Road cycling | 44,000 | \$86,500,000 |
| Single day trail | 92,000 | \$120,000,000 |
| Multi-day trail | 40,000 | \$65,500,000 |
| Total | 190,000 | \$293,000,000 |
| Interstate visitors to other interstate – Overnight trips | | |
| Mountain biking | 103,000 | \$159,500,000 |
| Road cycling | 112,000 | \$222,000,000 |
| Single day trail | 276,000 | \$360,000,000 |
| Multi-day trail | 112,000 | \$186,500,000 |
| Total | 603,000 | \$928,000,000 |



\$139m spent by Queenslanders in Queensland – money stays in the Queensland economy.



\$252m spent by Queenslanders in other states – money leaves the Queensland economy.



\$293m spent by visitors in Queensland – new money for the Queensland economy.



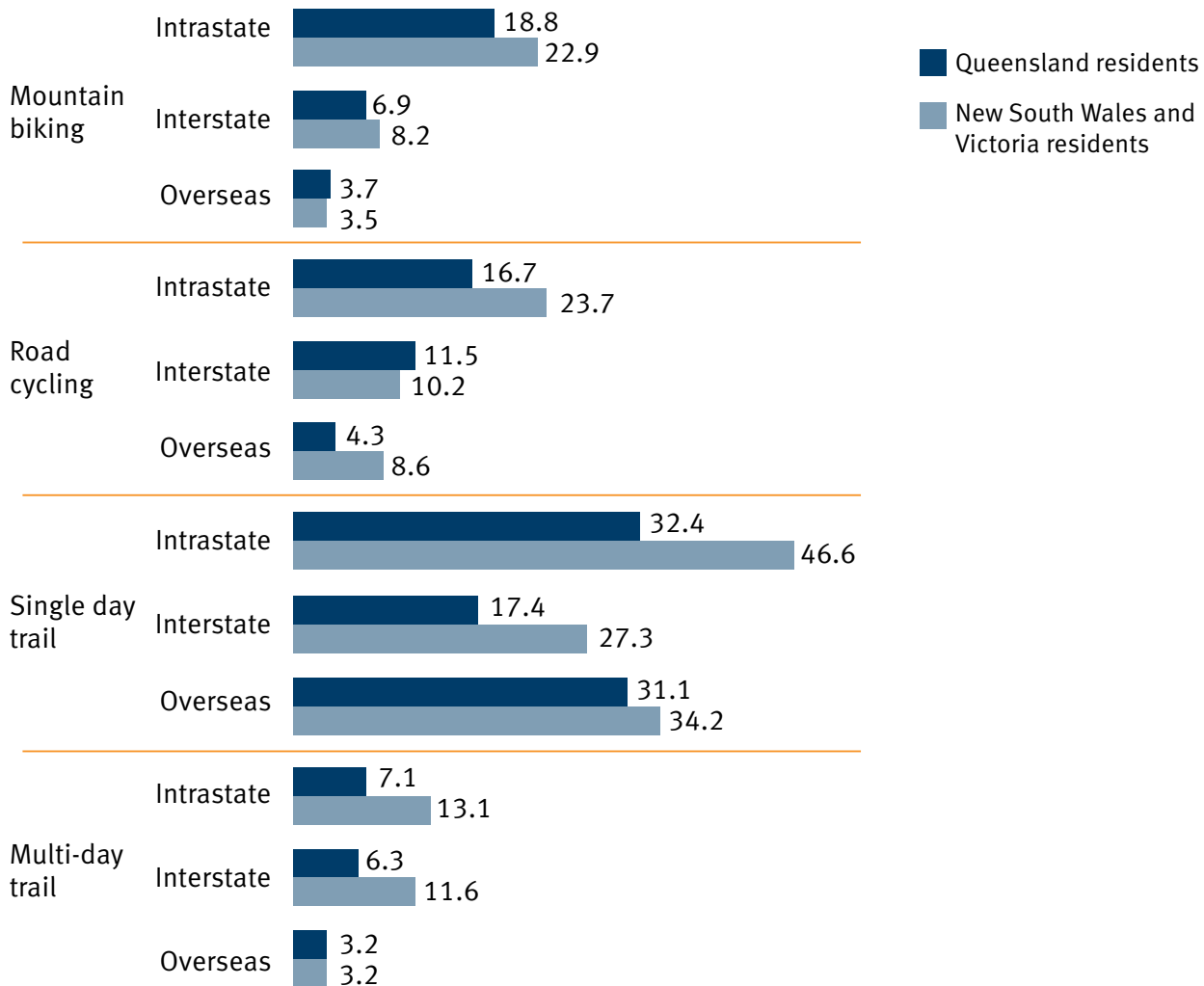
\$928m spent by interstate residents travelling to states other than Queensland – missed opportunity. (already travelling interstate for bike riding experiences, just not to Queensland)

All data is travel by Queensland, New South Wales and Victorian residents in the year ending November 2018

Bike tourism travel by Queenslanders

| | Number of Queenslanders taken a trip in last 12 months | Number of trips taken by Queenslanders in last 12 months | | | |
|--------------------------------------|--|--|------------|---------------------------|----------|
| | | Day trip 50km + | Intrastate | Overnight trip Interstate | Overseas |
| Mountain biking | 34,000 | 317,000 | 71,000 | 26,000 | 14,000 |
| Road cycling | 72,000 | 725,000 | 63,000 | 43,000 | 16,000 |
| Trail - Half day | 117,000 | 168,000 | 81,000 | 41,000 | 76,000 |
| Trail - Full day | 58,000 | 58,000 | 42,000 | 25,000 | 42,000 |
| Trail - Multi-day, returning | 11,000 | | 17,000 | 14,000 | 4000 |
| Trail - Multi-day, gear transported | 11,000 | | 5000 | 4000 | 5000 |
| Trail - Multi-day, carrying own gear | 8000 | | 5000 | 6000 | 3000 |

Overnight trips per 1000 residents: Queensland vs. New South Wales and Victoria

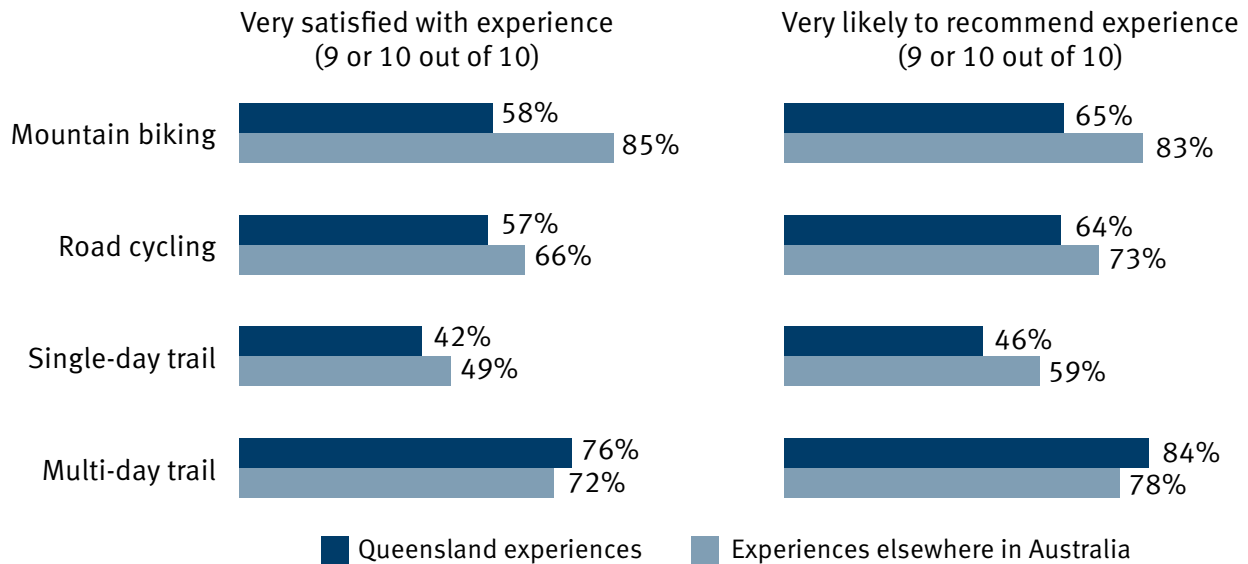


Per capita, Queensland residents are taking fewer intrastate trips for all types of bike tourism than residents of New South Wales and Victoria. There is a gap within the Queensland market at generating overnight intrastate mountain biking trips, road cycling trips and single and multi-day trail trips.

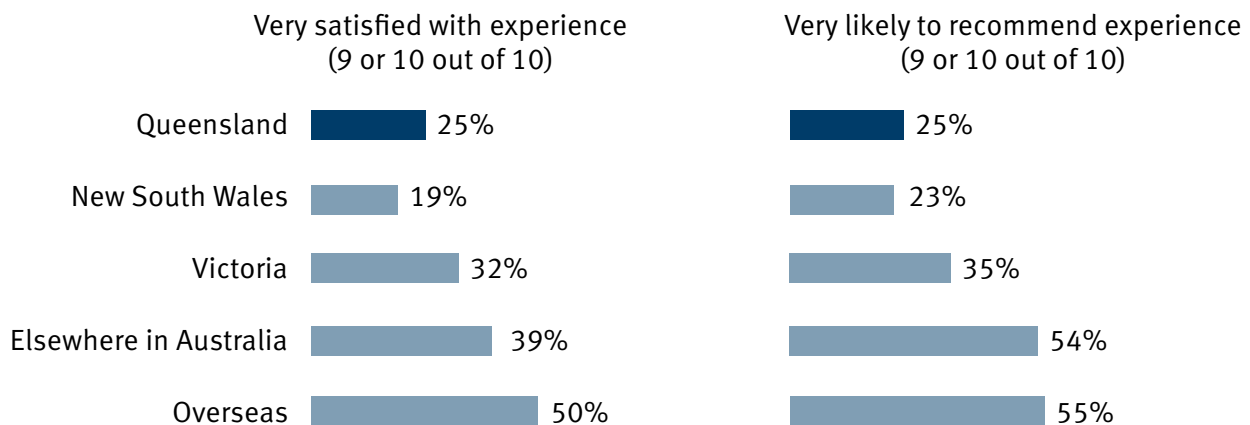
How does Queensland rate as a bike tourism destination?

Queensland’s riding strengths are generic tourism strengths. Potential bike travellers mostly view Queensland as a positive place to ride, however this is driven by generic tourism perceptions of Queensland, not bike tourism specific perceptions. There is an opportunity to develop, establish and promote bike tourism experiences, and to position Queensland as a bike tourism destination.

Satisfaction with bike tourism experiences



Performance of holiday riding experiences



For the most part, satisfaction and likelihood to recommend Queensland bike tourism experiences is lower than it is elsewhere in Australia. The most notable differences in performance are for mountain biking and holiday riding experiences. Only one in four people who have a holiday riding experience in Queensland are very satisfied or very likely to recommend the experience. This significantly lags other locations, most notably overseas destinations, where one in two are very satisfied and very likely to recommend.

To maintain performance and drive future growth, there is a need to improve the visitor experience for Queensland’s bike tourism experiences.

What is the tourism industry view?

There is currently a strong appetite in Queensland's tourism industry for developing bike tourism experiences, and individual destinations are forging ahead.

Development of bike tourism is on Queensland's radar

Beyond existing bike tourism experiences, Queensland is widely considered to have unrealised potential for bike tourism. Many Queensland destinations and organisations are already at different stages of exploring bike tourism.

Until recently, much of the interest and support for bike tourism appears to have been driven by passionate individuals. Local bike clubs become more vocal and seek support from councils and other government entities as a means to secure more funding, or passionate bike riders in positions of influence champion bike tourism as an opportunity to their organisations.

The well-publicised success of Derby in Tasmania, however, has been a catalyst leading to more destinations talking more seriously about bike tourism opportunities.

Commitment and coordination is key

The biggest barrier hindering bike tourism development in Queensland is the need to secure support from various stakeholders with varying levels of understanding of biking and tourism, and varying degrees of organisational interest in developing either.

The challenges most commonly arise with landowners and managers, which can extend across government departments, statutory corporations and private owners. In these situations, the process for those looking to develop bike tourism experiences can be complex, particularly when met with a default 'no' response from the landowner or manager. This is further compounded, as much of the development has been driven by passionate individuals and user groups who have limited time and resources.

Finally, as most bike tourism experiences are free to use, there is limited opportunity to recover expenses. The tourism industry generally acknowledges that developing bike tourism is often not a priority for land managers and can conflict with organisational goals. It can, however, be considered frustrating as the land is seen as an underutilised asset that could deliver strong community benefits.

Once established, strong working relationships can form between stakeholder groups to facilitate development and ongoing management of bike tourism experiences. There is a need for a statewide culture of supporting the development of bike tourism experiences, especially when they are seeking to leverage underutilised assets.

In addition, there is an opportunity to take a leadership position in supporting destinations and enthusiasts when dealing with government departments, statutory corporations and other land managers to facilitate the development of bike tourism experiences.

The following additional barriers limiting growth also exist:

- lack of authoritative evidence on the potential upside from developing bike tourism
- uncertainty on how to realise that growth, or where to turn for guidance
- prioritisation of existing tourism experiences.



What does the market want?



What does the market want?

Attracting visitors requires great bike tourism experiences. Travellers enjoy riding bikes on holidays, however the bike riding is just one component of a much broader experience. Motivating visitors requires offering a complete experience.

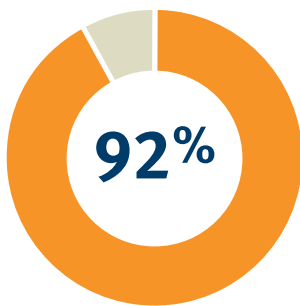
Bike tourism experiences need to offer:

- amazing scenery
- supporting experiences such as history, arts and culture, sightseeing, and other activities
- food and beverage
- variety to avoid monotony and encourage repeat visitation
- easy to access and hassle-free experiences, supported by services, information and signage.

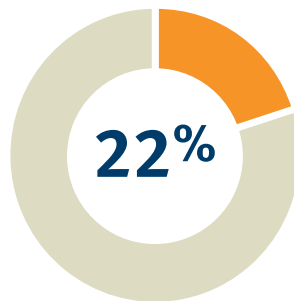
Queensland bike tourism experiences are competing against those in other states in addition to all other types of holidays. Travellers have limited time and resources, and are choosing between bike tourism experiences, beach experiences, city experiences and others.

Attracting interstate visitors requires great and unique experiences. However, a lower standard of experience is required to attract visitors from shorter distances.

"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."
– Bike traveller (focus group participant)



will recommend a **great** experience to friends and family



will recommend a **good** experience to friends and family

Queensland underperforms relative to other states

- In Queensland, 1 in 3 bike travellers had great experiences.
- In other states, 1 in 2 bike travellers had great experiences.

Across bike tourism, the following key factors will motivate visitors to travel:

- off-road experiences
- easy to find and reassuring information
- hassle-free experiences
- a biking culture
- more than just bike riding.

Off-road experiences

The fear of riding on the road is a very real barrier for many in the market. A large proportion of people will avoid bike riding experiences that involve a significant on-road component due to safety concerns. For many, it is a deal breaker.

Even among those willing to ride on roads with vehicle traffic, there remains a strong preference for riding where there is no traffic.

Inexperienced riders feel intimidated due to a lack of familiarity with riding bikes, with riding in traffic, or both. Experienced riders feel intimidated as they are more likely to have had close calls, even collisions, or know riders who have.

The fear of riding with traffic erodes many of the positive elements of a bike tourism experience that travellers are seeking. Having separate/dedicated bike routes that keep riders away from traffic increases perceptions of safety and encourages riding behaviour. Travellers are willing to spend between 50% to 100% longer on routes separated from car traffic.

Continued collaboration between government and stakeholders to improve the culture around riding on the road will reduce the barrier that on-road riding presents. However, significant improvements are required before bike tourism experiences with on-road riding components are appealing to the mass market.

Priority should be given to bike riding experiences that are separated from traffic – they will appeal to a broader market and deliver more positive experiences for visitors. Queensland destinations should still embrace bike tourism opportunities that involve road riding, however preference should be given to non-road riding experiences.

“Don’t want to go on the road with my young son. Conscious that he’s not savvy enough, not safe enough.”

–Focus group participant

“Years ago, I did a bit of road cycling with people in the street. Over the years that fell apart. I found it dangerous.”

– Focus group participant

“I do very little road riding on bikes. Every rider I’ve known has had an accident.”

– Focus group participant

“I simply don’t ride on the road. I don’t trust drivers. In the areas that I can ride on the road, the roads are too narrow.”

– Focus group participant



Easy to find and reassuring information

Travellers need help when looking for places to ride, and when planning bike rides. This applies across all types of riders, from regular mountain bikers and road cyclists through to the most casual holiday riders. Bike riders need easy to find information that tells them:

- rides that are available
- specific details about a ride.

Many potential bike riders are hesitant to ride when their questions are left unanswered. Currently there is a gap in available information which can impact on the uptake of bike riding. With most users relying on word of mouth, the lack of an authoritative source of information impacts the level of trust. The information gap is more of an issue for casual riders than it is for trail riding and holiday riding, however the gap still exists among enthusiast groups, including both mountain bikers and road cyclists.

Provide reliable and comprehensive information about bike riding experiences. To generate interest in visiting a destination, travellers need easy access to the riding options available. Once aware, travellers need to know specific details to decide if they would enjoy a ride and how to make the most out of their experience.

Types of information people are seeking

- Where should I go?
 - Where can I get a map?
 - How far is it?
 - What's the elevation profile?
 - What is the trail like?
 - Is there any riding on the road?
 - What type of bike do I need?
 - Which direction is best to ride?
 - What fitness levels are required?
 - What skills are required?
 - Is it good for families? What age children?
 - What key points of interest should I stop at along the way?
 - Do I need to take water? Food? Anything else?
 - Are there places to stop for food and drink? Which are best?
-



Hassle-free experiences

Travellers are seeking hassle-free experiences, however bike tourism experiences rarely are. Small matters can present barriers to visitation and participation, or simply undermine the experience. Removing these barriers will encourage participation in bike riding and improve the overall visitor experience. Hassle-free is more important for encouraging casual riding experiences, however it is also a barrier to enthusiast riders such as mountain bikers and road cyclists.



Key barriers include:

- finding convenient bike rental locations
- lack of maps that show riders where to go
- inconsistent or poor signage that creates constant stopping
- sourcing information about trail and road conditions.

For those travelling with their own bikes, there are further considerations including:

- secure bike storage at the accommodation
- bike assembly facilities at airports
- bike racks for rental cars.

A biking culture

Bike riding is a very social activity for all types of riders, including enthusiasts and casual riders. It delivers shared experiences with friends and family, but also an opportunity to connect with like-minded people on the trail. Destinations where there is a culture, vibe or scene surrounding the bike riding will deliver the best visitor experience for travellers.

The development of the culture can be supported through centrally located trailheads, that allow for the bike riding experiences to be part of the town. Food and beverage locations can also play an important role, enabling bike riders to more easily connect. In more developed destinations, cafes and bars at the

trailhead are extremely popular. In destinations where trails are not centrally located, connecting the trails to the town can replicate the effect. For example, in Atherton, a mountain bike skills park and car parking was created in town, with an access trail built to connect to the main trailhead. Where that is not possible, bike shops with cafes can become central hubs where bike riders can mix with others, both visitors and locals.

Bike tourism development should be prioritised in locations that can offer a central hub, ideally with food, beverage, retail and accommodation options. Where this is not possible, facilitate the development of the bike culture – connect trailheads to town with well-signed access trails, develop a central hub in town, or develop on-site food and beverage facilities.



More than just bike riding

Travellers enjoy riding bikes on holidays, however bike riding is part of a broader experience. Potential visitors will be more motivated by a complete experience. Even among enthusiast bike riders – such as mountain bikers and road cyclists – the complete experience is an important driver of destination choice and visitor experience.

Supporting experiences are critically important. Amazing scenery, quality food and beverage, heritage, history and learning are effective complements to bike riding experiences. Other activities that can be enjoyed in a destination (for example, hiking, swimming and sightseeing) assist in creating a more complete and motivating experience. Supporting experiences must be authentic and fit with the destination. For example, wineries are a popular complementary experience for trails through wine growing regions, but would not fit with the bike tourism assets in other regions.

Travellers have limited holiday time and resources and are evaluating bike riding holidays against all other holiday options. For bike riding holidays, there is strong competition from established and new destinations. Due to the strong competition, a destination must deliver unique bike tourism experiences to attract interstate visitors. The standard of experience is lower to attract visitors from shorter distances.

Prioritise development of signature bike tourism experiences that will attract visitors from interstate markets. Focus on raising a small number of destinations to top-tier status. Avoid investing resources too broadly, creating many mid-tier destinations that will not attract meaningful visitation.



Drawing description from focus group participants of “what biking on holidays means to you”

What are the opportunities for bike tourism in Queensland?



Key opportunities for Queensland

With an already latent demand for bike tourism experiences and strong support among destinations to focus on the market, there is significant unrealised potential for bike tourism in Queensland.

The key areas of opportunity for Queensland are:

- **half and single day trail riding experiences**
- **multi-day trail riding experiences**
- **mountain biking destinations.**

To realise the potential of these opportunities, the priorities for Queensland are to:

Establish a policy framework to shape the development of bike tourism in Queensland

- Create a supportive culture that embraces bike tourism in decision making.
- Support improved governance structures and sustainable funding arrangements for bike tourism assets.
- Ensure the policy framework considers accessibility of bike tourism for vulnerable people, including people with disability and low income families.

Actively support developers of bike tourism with information and advice

- Share information, in particular proof of the market's potential.
- Create a central point of contact for easy access to relevant information, guidance and contact information for key personnel.
- Advocate with government, tourism organisations and land managers, and provide influence at senior levels.
- Develop economic impact statement case studies to showcase the positive impact of developing and supporting bike tourism.

Identify and implement new signature Queensland bike tourism experiences

- Identify potential signature single-day trail riding experiences. Demonstrate how they will meet the market demand and satisfy the criteria for great trails. Investigate opportunities to invest.
- Identify potential signature mountain bike destinations. Demonstrate how they will meet the market demand and satisfy the criteria for great mountain biking experiences. Investigate opportunities to invest.
- Continue to support development of multi-day trail riding experiences.

Actively promote bike tourism in Queensland, including special events

- Encourage destinations to include more bike tourism experiences in their marketing, including more imagery of visitors riding bikes in the destination.
- Co-ordinate a central source of information on signature bike tourism experiences, to support trip planning.
- Continue to support events that grow visitation. Prioritise support for events that promote bike tourism assets and year-round travel.
- Engage with industry organisations such as AusCycling and Outdoors Queensland to identify events that may be destination experiences for bike tourists.
- Promote riding experiences, events and facilities to bike tourists.

How do we develop bike tourism in Queensland?



How do we develop bike tourism in Queensland?

The following key success factors for developing bike tourism in Queensland have been developed with reference to real-world examples by world leaders in bike tourism such as New Zealand and Canada:

- clear governance model
- engaged local communities
- destination branding
- leveraging events.

Clear governance model

The right governance model is essential for the ongoing success of bike tourism assets. A bike tourism experience is rarely 'owned' by a single entity. Multiple organisations may be responsible for different elements such as land management, maintenance and marketing.

The challenges are greater still for large infrastructure such as rail trails, that can be spread across multiple government jurisdictions.

The right governance model will:

- provide a clear strategy and direction for the asset
- ensure consistent marketing (branding, promotion, information, web presence)
- deliver a consistent experience for users
- allow a unified voice when negotiating with stakeholders
- define roles and responsibilities for stakeholders
- engage with the local community
- enable the development of sustainable external funding sources.

Case study: New Zealand Cycle Trails⁸

The New Zealand Cycle Trails evaluated the establishment of the trails and concluded that there was no one-size-fits-all governance and management structure at the trail level, and this had given rise to variations of governance and management structures.

Key factors of success for informing overall governance and management of the trails include:

- a governance body at trail level that has a clear strategy, leadership and direction
- appointment of board members with relevant skills and experience, and the inclusion of local executives in the governance body
- clarity around the roles and responsibilities of the governance body, including the separation of their governance and management duties
- having a dedicated resource to maintain and develop the trails
- involvement of the local or central government in the management structures
- clear roles and responsibilities of trail partners and clarity about partners' commitment to long-term funding
- existence of a dedicated and specialist team at the regional level that helps with marketing and promotion of the trails.

All bike tourism assets should have a carefully considered and robust governance model in place. Prioritise governance models that facilitate the development of sustainable external funding sources and the continued growth of the asset as a tourism experience.

Case study: Alps to Ocean Trail⁹

The Alps to Ocean Trail extends more than 300km from New Zealand's highest peak (Aoraki/Mount Cook) to Oamaru on the Pacific Ocean. It is a four to six-day ride to cover the entire trail or it can be used as a day excursion.

Since the trail spans four local government jurisdictions, it was decided early on to set up a trust to manage the development and ongoing maintenance and marketing of the trail. The trust includes representatives from each of the four councils and each council contributes toward the trust, which employs a manager responsible for managing and marketing the trail.

In 2012, the trust developed a brand identity for the trail and registered a logo and launched the Alps 2 Ocean Official Partner Programme. An official partner sticker was created to signify that a business was an 'official partner' as well as being a symbol of quality and assurance that the business is 'bicycle-friendly'.

The program was also developed to recognise that the physical bike trail is only one part of the overall product that attracts bike riders to the area. In addition to the trail, bike riders require services such as transport, accommodation, bike hire,

food, and activities for when they are not riding. They expect a high level of customer service and appreciate a warm welcome.

The Alps 2 Ocean Official Partner Programme aims to attract more bike riders to the region by assisting visitors to connect with businesses that consistently provide a high standard of customer care to bike riders on the Alps 2 Ocean Cycle Trail. The intention is that this will, in turn, increase the turnover of businesses participating in the program and provide benefits and jobs to communities.

The key successes of the partnership program include:

- ensuring businesses that benefit from the trail contribute toward the development of the trail
- providing additional revenue for trail marketing (via partnership fees)
- being a symbol of quality assurance – businesses are required to meet minimum standards to retain partnership status.



Engaged local communities

Engaged locals have a multiplier effect on a destination. They volunteer time to maintain and upgrade trails, they engage with visitors and grow the biking culture. In many cases, they are the reason the asset even exists. The benefits of such a community include:

- enabling ongoing support, maintenance and development of trails
- delivering timely trail maintenance
- facilitating the development of support services (bike shops, hotels offering bike storage facilities, bike-friendly bars and cafes)
- leading fundraising initiatives
- providing a strong voice for the continued support
- contributing to the culture and scene in a destination.

An engaged local biking community can, however, also present challenges. When repairs and maintenance are volunteer-led, promoting the trails to grow tourism can be seen as ‘stealing’ their hard work. As such, the local community should be treated as an important stakeholder, and the relationship properly managed.

Prioritise support for development of bike tourism experiences in destinations that have an existing engaged local riding community. Where this does not exist, facilitate the development of such a community. In all situations, treat the local riders as an important stakeholder, and proactively manage the relationship.

Case study: Noosa Trailblazers Mountain Bike Club

Noosa Trailblazers is a mountain bike club of approximately 100 members that builds and maintains trails in Tewantin National Park (Wooroi). This is facilitated through a strong relationship with the Queensland Parks and Wildlife Service (QPWS).

Since 2013, the club has secured \$230,000 in funding – including grants from Noosa Shire Council and the Queensland Government – to support trail maintenance and development, primarily through employing professional trail building companies.

Secure the funding required substantial effort – all of it volunteered by a few extremely motivated individuals. The club even sold equipment and merchandise to fund grant co-contribution requirements which, in some cases, were then used to fund co-contributions of larger grants. Significant volunteer hours have also been spent building the relationship and securing approvals from QPWS. Volunteer labour from the club and local riders also supports the trail work and maintenance.

In 2017, more than 80,000 riders were recorded on the trail network, highlighting the broader benefits generated from the small club’s efforts. The club has also worked with Tourism Noosa to facilitate the hosting of mountain bike media on the trails, generating exposure for the destination. Since the investment period started, new bike stores have opened in Noosa.

Despite this past success, failure to secure ongoing funding would limit the club’s ability to maintain the trails which would quickly fall into disrepair. This would lead to a loss of a strong tourism and community asset.

Beyond sourcing funds through grants, the club has limited opportunities to raise additional funds. Traditional fundraising activities, such as hosting events, on-site barbeques and coffee carts are also restricted due to land usage rules and regulations. The club has a longer-term goal of securing regular and ongoing funding from the Noosa Shire Council, however until this is realised the trail network is at risk from its own popularity and the seasonal impacts of severe weather events.

Case study: Whistler Off-Road Cycling Association

Separate to the world-renowned bike park, the Whistler Valley offers more than 300km of mountain bike trails. This network is maintained by the Whistler Off-Road Cycling Association (WORCA), with support from the municipal government and the local community. Due to the strength of these relationships, the trail network is maintained at a standard that would alone make Whistler one of the most desirable mountain biking destinations on the planet.

WORCA have a formal fee-for-service relationship with the local council, valued at \$50,000 annually¹⁰.

A three-year agreement allows WORCA to plan strategically. Through additional fundraising initiatives, WORCA were able to invest \$105,000 in trail maintenance and operations during 2018, supported by more than 800 hours of volunteer maintenance.

The trails in the Whistler Valley saw more than 360,000 riders in 2016, including 160,000 visitors to the resort¹¹. Despite having more than 1,800 members and an extremely engaged community, WORCA would not be able to maintain the trails to the standard required to drive tourism without its service agreement with the local council.



Destination branding

The key driver of bike tourism is the specific riding experiences and destinations. A region or state does not need to be known as a great place for riding for destinations to have success at developing bike tourism. For example, bike travellers refer to riding Whistler Valley or the Murray to the Mountain Trail, not Canada or Victoria.

Positive perceptions of a region as a bike tourism area can assist in driving tourism, however, the local bike tourism experiences are what drive perceptions of a state or region as a bike tourism destination, and not the other way around. New Zealand is considered a great destination for trail riding because of the amazing trail riding experiences offered.

Focus on growing bike tourism at the destination level by trail and trail network by developing and promoting great bike riding experiences.

Leveraging events

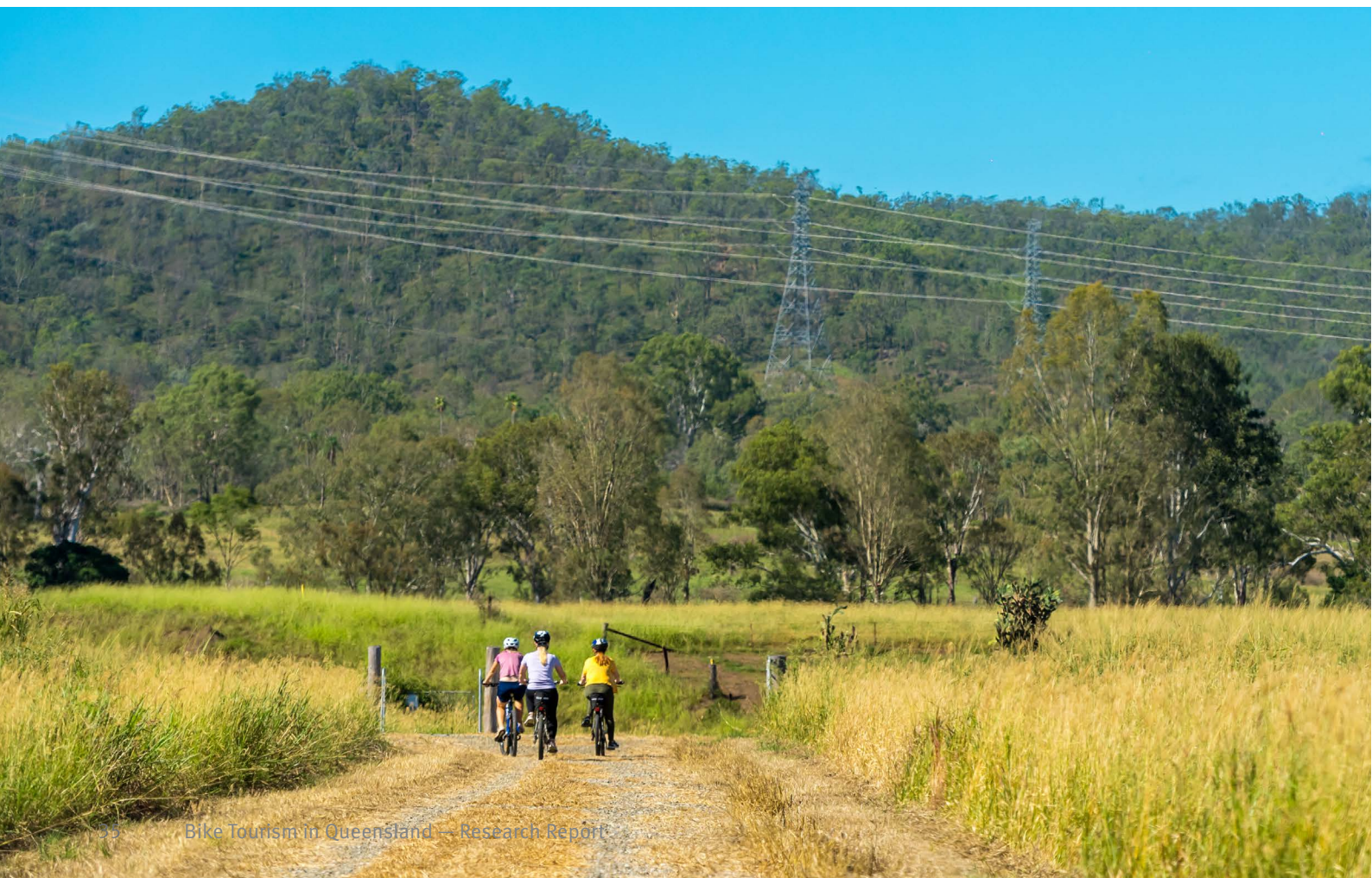
Events are an important part of bike tourism and an important tool for supporting the growth of bike tourism in Queensland. Amateur participation events represent a sizeable portion of existing travel, particularly among road cyclists.

To maximise the growth of bike tourism, destinations should focus on events that:

- celebrate bike tourism experiences that are intrinsically linked to the destination
- promote experiences that can support year-round visitation.

Bike events should continue to be an important focus for the tourism industry in Queensland, as they can deliver significant economic uplift. However, priority should be given to events that will grow year-round visitation to the destination, not just during the event dates.

Destination development should be prioritised before hosting major bike events to enable the destination to fully leverage the benefits.



Case study: Cairns UCI Mountain Bike World Cup

Cairns has hosted several Union Cycliste Internationale (UCI) Mountain Bike World Cup events in 2014 and 2016, as well as the World Championships in 2017.

These events have delivered positive economic impact for the economy. The 2014 UCI Mountain Bike World Cup in Cairns contributed an estimated \$3.5 million to the state's economy¹⁴.

However, the World Downhill course featured during the event is a declared Restricted Access Area and can only be ridden with a permit.

Smithfield offers a quality mountain bike experience, but lacks the scale and many other key elements of the experience for it to be a marquee bike tourism destination that attracts significant numbers of visitors from around Australia.

While successful events in their own right, the ongoing economic impact of the Cairns UCI events has been limited.

4% of mountain bikers are considering Cairns for their next trip.

Case study: Derby Enduro World Series

Derby in Tasmania hosted a stage of the Enduro World Series (EWS) in 2017 and 2019. The EWS showcased the number of quality trails in Derby. All seven trails featured in the stage race can be ridden by the general public, thereby promoting Derby as a riding destination.

'Detonate' trail was voted Derby's best trail by professional mountain bikers competing in the EWS 2017 season. Other stops on the 2017 tour included Whistler, Rotorua, Aspen Snowmass and Finale Ligure, delivering significant recognition for the Derby riding experience.

However, at the time of hosting the event, Derby had the volume and quality of trails, as well as many other key elements, to be a successful mountain bike destination on its own.

The profile and reputation developed from hosting the EWS, along with market-ready bike tourism experience, has ensured the economic benefits of the event will be far longer lasting than the event period itself. By early 2018, visitor numbers to Derby were estimated to have doubled since the announcement of the 2017 event¹⁵.

28% of mountain bikers are considering Derby for their next trip.

Appendices



Appendix A: Detailed research methodology

A comprehensive program of research was undertaken to develop the findings contained in this report.

1. Extensive secondary research review

PURPOSE Leverage existing knowledge to enrich understanding of the market and industry.
Identify gaps in existing knowledge that need to be addressed.
Ensure the project built on existing knowledge, rather than duplicating it.

PROCESS More than 75 documents were reviewed, including research papers, strategies, economic impact assessments, case studies, journal and media articles.

2. Internal stakeholder interviews

PURPOSE Leverage existing knowledge to enrich understanding of the market and industry.
Ensure the project built on existing knowledge, rather than duplicating it.
Ensure the project direction would deliver relevant and actionable findings for end users.

PROCESS Six in-depth interviews of one hour with key stakeholders.
Interviewees consisted of the following (note some interviews had multiple stakeholders)

- Three stakeholders from the Department of Transport and Main Roads
- Four stakeholders from the Department of Innovation, Tourism Industry Development
- One stakeholder from Tourism and Events.

3. External stakeholder interviews

PURPOSE Build on existing knowledge of the market and target audience
Fill knowledge gaps identified in Secondary Research Review and Internal Interviews
Leverage the experiences of destinations that have invested in bike tourism
Develop a deeper understanding of the market and target audience
Build support among stakeholder groups for the consumer stages of the research

PROCESS Thirteen in-depth interviews of up to one hour with key stakeholders.
Included in the interviews were representatives of the following organisations:

| | | |
|--|---|--|
| ■ Bicycle Queensland | ■ Townsville Rockwheelers | ■ World Trail |
| ■ Mountain Biking Australia | ■ Indigo Shire Council | ■ Bicycle Industries Australia |
| ■ Queensland Outdoor Recreation Federation | ■ Tourism Policy at the Ministry of Business, Innovation and Employment (New Zealand) | ■ Noosa Trailblazers Mountain Bike Club. |
| ■ Southern Queensland Country Tourism | ■ Otago Central Rail Trail Charitable Trust (New Zealand) | |
| ■ Visit Sunshine Coast | | |
| ■ Townsville Enterprise | | |

4. Qualitative focus groups

To understand bike traveller’s needs, motivations, attitudes, perceptions and opportunities around bike tourism.

The specific objectives of this stage were to:

PURPOSE

- Explore existing behaviours, both bike riding and bike riding holiday behaviours.
- Understand the motivations to travel to a destination, including how they found out about it.
- Identify the bike riding destinations that are most desirable and considered (bucket list vs likely to visit).
- Understand what makes a destination appealing for bike riding, specifically
 - Bike riding experiences
 - complementary experiences (e.g. scenery, food and beverage, other activities)
 - auxiliary services (e.g. bike shops, luggage services, transport).
- Understand what is essential for a positive in-destination experience, specifically
 - bike riding experiences
 - complementary experiences (e.g. scenery, food and beverage, other activities)
 - auxiliary services (e.g. bike shops, luggage services, transport).
- Understand the above behaviours and perceptions specifically for bike riding and bike riding holidays in Queensland.
- Identify motivations and barriers to bike riding holidays in Queensland.
- Explore ideal Queensland bike riding destination.

Eight focus groups were conducted from 1-23 August 2018.

Each group was approximately two hours in length, and had six to seven participants.

Respondents were recruited to reflect a broad variety of bike traveller types.

PROCESS

Note that based on the secondary research review and stakeholder interviews, Road Cycling was not included in the focus groups. The rationale was that the industry considered Road Cycling as a lower priority opportunity given the challenges presented by infrastructure requirements when developing Road Cycling. Understanding how to develop their ideal destinations were lower priority than other types of riding.

Focus group structure

| RIDER TYPE | LOCATIONS | RECRUITMENT SPECIFICATIONS | |
|---------------------------|------------------------|---|---|
| Mountain biking | Brisbane and Sydney | Travelled to Mountain Bike in the last 12 months, intending to travel for Mountain Biking in the next 12 months. | |
| Adventure trail riding | Brisbane and Melbourne | Travelled to ride a bike trail in the last 12 months (specified as not mountain biking), intending to do so again in the next 12 months | a more rugged, challenging and adventurous bike riding experience, more about the biking; carry own gear; riding more than 45 kilometres a day. |
| Recreational trail riding | Brisbane and Sydney | | a more recreational, relaxed bike riding experience |
| Holiday riding | Brisbane and Melbourne | Taken an overnight trip, and rode a bike (but the biking was not a key reason for taking the trip). | |

5. Qualitative online surveys

PURPOSE

To value the bike tourism market and size the opportunity for Queensland.

To confirm findings from earlier stages of the research.

PROCESS

Two online surveys were developed, the consumer panel survey and the promoted survey.

The purpose of the consumer panel survey was to provide an objective view of the market, their perceptions and their behaviour (to be used for market sizing). As an invite-only survey, it was the best approach for sourcing unbiased data.

The purpose of the promoted survey was to capture behaviour and attitudes among key markets where the incidence rate was too small for panel-based surveys. Specifically, mountain bikers, road cyclists and multi-day trail riding.

Consumer panel survey

- Twelve minute online survey, conducted with randomly chosen members of an online consumer panel.
- Fieldwork was conducted from 15 October to 5 November 2018.
- Questionnaire covered topics including the appeal of riding experiences, past behaviour, last holiday riding trip (if appropriate), last Riding Holiday (if appropriate), and profiling data.
- Total sample size was n=1,420 including:
 - n=866 riders - rode a bike on a trip in the last 12 months – o/n or day trip 50km+
 - n=554 non-riders, who completed a shorter survey to size appeal of riding types.
- The sample was across Queensland, New South Wales and Victoria, with quotas for metro and regional areas to ensure broad representation across the states. Data was post-weighted to reflect the total population.

Promoted survey

- Fifteen minute or more online survey. The length of the survey varied as respondents were given the option of completing 'bonus' modules based on their past experiences.
- Survey was live from 24 October to 19 November 2018.
- A final sample size of n=1,010 completed surveys was achieved.
- The survey was hosted at www.qldbikesurvey.com.au and promoted through partners and social media.
- Bicycle Queensland, Mountain Bike Australia and Queensland Outdoor Recreation Federation promoted the survey to their memberships.
- A Facebook page was created to facilitate sharing, and supported by:
 - seeding in 75+ Facebook biking groups
 - upon completion of survey, social sharing won bonus entries
 - paid Facebook advertising.
- Facebook performed extremely well
 - total reach 38,045 (28,260 organic + 10,718 paid)
 - 8.7 per cent clicked on the post (3,311)
 - 3.2 per cent clicked on the link (1,218).
- Completion rates and drop-out rates were within normal ranges.

Sample was from across Australia, with the strongest participation from Queensland, data weighted based on consumer panel results.

6. Post-weighting quantitative research data

Following completion of the online surveys, data was post-weighted to reflect incidence of cycling experiences per the National Visitor Survey¹⁶ (NVS).

The NVS is a large-scale telephone survey which has been conducted continuously since January 1998, and is designed to measure domestic and outbound travel by Australian residents. The NVS is conducted by Tourism Research Australia, and funded by the Australian Government, and state and territory

governments. The NVS data was extracted to align with the markets tested within this research. The time period represented in the NVS was for the year ending September 2018.

Specifically, the number of trips with a bike riding experience identified in the online research was weighted to reflect the number of trips identified in the NVS.

Appendix B: Detailed market sizing

Detailed market size: Queensland, New South Wales and Victoria

| | ANY TRIP | DAY TRIP 50KM + | INTRASTATE | INTERSTATE | OVERSEAS |
|---|----------|--------------------|------------|------------|----------|
| Participation Last 12 Months (% of population) | | | | | |
| Mountain Biking | 1.2% | 1.1% | 0.5% | 0.4% | 0.2% |
| Road Cycling | 2.2% | 1.9% | 0.8% | 0.6% | 0.3% |
| Trail - Half Day | 3.1% | 1.4% | 1.2% | 0.9% | 1.1% |
| Trail - Full Day | 1.6% | 0.8% | 0.6% | 0.5% | 0.6% |
| Trail - Multi Night, Returning | 0.4% | 0.0% | 0.3% | 0.3% | 0.1% |
| Trail - Multi Night, Transported Gear | 0.2% | 0.0% | 0.1% | 0.1% | 0.1% |
| Trail - Multi Night, Carrying Own Gear | 0.2% | 0.0% | 0.2% | 0.1% | 0.1% |
| Participation (number of Adults, QLD, NSW and VIC) | | | | | |
| Mountain Biking | 177,000 | 156,000 | 73,000 | 57,000 | 26,000 |
| Road Cycling | 323,000 | 284,000 | 125,000 | 83,000 | 44,000 |
| Trail - Half Day | 455,000 | 208,000 | 174,000 | 128,000 | 169,000 |
| Trail - Full Day | 245,000 | 115,000 | 88,000 | 72,000 | 85,000 |
| Trail - Multi Night, Returning | 61,000 | - | 43,000 | 38,000 | 14,000 |
| Trail - Multi Night, Transported Gear | 34,000 | - | 19,000 | 10,000 | 11,000 |
| Trail - Multi Night, Carrying Own Gear | 27,000 | - | 27,000 | 20,000 | 11,000 |
| Average number of trips Last 12 Months | | | | | |
| Mountain Biking | | 10.6 | 1.8 | 0.7 | 0.3 |
| Road Cycling | | 14.4 | 1.0 | 0.5 | 0.3 |
| Trail - Half Day | | 1.5 | 1.0 | 0.5 | 0.8 |
| Trail - Full Day | | 1.1 | 0.8 | 0.5 | 0.6 |
| Trail - Multi Night, Returning | | - | 2.1 | 1.8 | 0.3 |
| Trail - Multi Night, Transported Gear | | - | 0.6 | 0.5 | 0.4 |
| Trail - Multi Night, Carrying Own Gear | | - | 0.9 | 1.0 | 0.6 |
| Total Number of Trips Last 12 Months | | | | | |
| Mountain Biking | | 1,875,000 | 324,000 | 117,000 | 52,000 |
| Road Cycling | | 4,643,000 | 325,000 | 156,000 | 112,000 |
| Trail - Half Day | | 667,000 | 442,000 | 242,000 | 356,000 |
| Trail - Full Day | | 262,000 | 196,000 | 126,000 | 140,000 |
| Trail - Multi Night, Returning | | | 127,000 | 109,000 | 18,000 |
| Trail - Multi Night, Transported Gear | | | 21,000 | 15,000 | 12,000 |
| Trail - Multi Night, Carrying Own Gear | | | 24,000 | 28,000 | 17,000 |

Detailed market size: Queensland

| | ANY TRIP | DAY TRIP 50KM + | INTRASTATE | INTERSTATE | OVERSEAS |
|---|----------|-----------------|------------|------------|----------|
| Participation Last 12 Months (% of population) | | | | | |
| Mountain Biking | 0.9% | 0.8% | 0.3% | 0.2% | 0.1% |
| Road Cycling | 1.9% | 1.8% | 0.4% | 0.3% | 0.1% |
| Trail - Half Day | 3.1% | 1.8% | 0.7% | 0.4% | 0.9% |
| Trail - Full Day | 1.5% | 0.7% | 0.4% | 0.4% | 0.7% |
| Trail - Multi Night, Returning | 0.3% | | 0.2% | 0.2% | 0.1% |
| Trail - Multi Night, Transported Gear | 0.3% | | 0.05% | 0.05% | 0.05% |
| Trail - Multi Night, Carrying Own Gear | 0.2% | | 0.1% | 0.1% | 0.05% |
| Participation (number of Adults, QLD only) | | | | | |
| Mountain Biking | 34,000 | 31,000 | 14,000 | 9,000 | 6,000 |
| Road Cycling | 72,000 | 67,000 | 17,000 | 11,000 | 4,000 |
| Trail - Half Day | 117,000 | 69,000 | 27,000 | 18,000 | 33,000 |
| Trail - Full Day | 58,000 | 26,000 | 18,000 | 17,000 | 27,000 |
| Trail - Multi Night, Returning | 11,000 | - | 9,000 | 10,000 | 4,000 |
| Trail - Multi Night, Transported Gear | 11,000 | - | 3,000 | 2,000 | 2,000 |
| Trail - Multi Night, Carrying Own Gear | 8,000 | - | 4,000 | 4,000 | 2,000 |
| Average number of trips Last 12 Months | | | | | |
| Mountain Biking | | 9.4 | 2.1 | 0.8 | 0.4 |
| Road Cycling | | 10.2 | 0.9 | 0.6 | 0.2 |
| Trail - Half Day | | 1.4 | 0.7 | 0.3 | 0.6 |
| Trail - Full Day | | 1.0 | 0.7 | 0.4 | 0.7 |
| Trail - Multi Night, Returning | | | 1.6 | 1.4 | 0.4 |
| Trail - Multi Night, Transported Gear | | | 0.4 | 0.3 | 0.5 |
| Trail - Multi Night, Carrying Own Gear | | | 0.7 | 0.8 | 0.4 |
| Total Number of Trips Last 12 Months | | | | | |
| Mountain Biking | | 317,000 | 71,000 | 26,000 | 14,000 |
| Road Cycling | | 725,000 | 63,000 | 43,000 | 16,000 |
| Trail - Half Day | | 168,000 | 81,000 | 41,000 | 76,000 |
| Trail - Full Day | | 58,000 | 42,000 | 25,000 | 42,000 |
| Trail - Multi Night, Returning | | | 17,000 | 14,000 | 4,000 |
| Trail - Multi Night, Transported Gear | | | 5,000 | 4,000 | 5,000 |
| Trail - Multi Night, Carrying Own Gear | | | 5,000 | 6,000 | 3,000 |

Detailed market size: New South Wales and Victoria

| | ANY TRIP | DAY TRIP 50KM + | INTRASTATE | INTERSTATE | OVERSEAS |
|--|----------|--------------------|------------|------------|----------|
| Participation Last 12 Months (% of population) | | | | | |
| Mountain Biking | 1.3% | 1.1% | 0.5% | 0.4% | 0.2% |
| Road Cycling | 2.3% | 2.0% | 1.0% | 0.6% | 0.3% |
| Trail - Half Day | 3.0% | 1.3% | 1.3% | 1.0% | 1.2% |
| Trail - Full Day | 1.7% | 0.8% | 0.6% | 0.5% | 0.5% |
| Trail - Multi Night, Returning | 0.4% | | 0.3% | 0.2% | 0.1% |
| Trail - Multi Night, Transported Gear | 0.2% | | 0.1% | 0.05% | 0.1% |
| Trail - Multi Night, Carrying Own Gear | 0.2% | | 0.2% | 0.1% | 0.1% |
| Participation (number of Adults, NSW & VIC) | | | | | |
| Mountain Biking | 143,000 | 125,000 | 59,000 | 48,000 | 20,000 |
| Road Cycling | 251,000 | 216,000 | 108,000 | 72,000 | 39,000 |
| Trail - Half Day | 338,000 | 139,000 | 147,000 | 110,000 | 137,000 |
| Trail - Full Day | 187,000 | 89,000 | 70,000 | 55,000 | 58,000 |
| Trail - Multi Night, Returning | 51,000 | - | 34,000 | 28,000 | 11,000 |
| Trail - Multi Night, Transported Gear | 22,000 | - | 16,000 | 8,000 | 9,000 |
| Trail - Multi Night, Carrying Own Gear | 20,000 | - | 23,000 | 16,000 | 9,000 |
| Average number of trips Last 12 Months | | | | | |
| Mountain Biking | | 11.0 | 1.8 | 0.6 | 0.3 |
| Road Cycling | | 15.8 | 1.0 | 0.4 | 0.4 |
| Trail - Half Day | | 1.5 | 1.1 | 0.6 | 0.8 |
| Trail - Full Day | | 1.1 | 0.8 | 0.5 | 0.5 |
| Trail - Multi Night, Returning | | | 2.2 | 1.9 | 0.3 |
| Trail - Multi Night, Transported Gear | | | 0.7 | 0.5 | 0.3 |
| Trail - Multi Night, Carrying Own Gear | | | 0.9 | 1.1 | 0.7 |
| Total Number of Trips Last 12 Months | | | | | |
| Mountain Biking | | 1,557,000 | 253,000 | 90,000 | 38,000 |
| Road Cycling | | 3,918,000 | 262,000 | 112,000 | 95,000 |
| Trail - Half Day | | 499,000 | 361,000 | 202,000 | 280,000 |
| Trail - Full Day | | 204,000 | 154,000 | 101,000 | 98,000 |
| Trail - Multi Night, Returning | | | 111,000 | 95,000 | 14,000 |
| Trail - Multi Night, Transported Gear | | | 16,000 | 12,000 | 7,000 |
| Trail - Multi Night, Carrying Own Gear | | | 19,000 | 21,000 | 14,000 |

Appendix C: Secondary research reference

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- 14 State of Queensland (Department of Transport and Main Roads) Queensland Cycling Strategy 2017–2027, August 2017.
- 15 <https://flowmountainbike.com/tag/derby/>
- 16 <https://www.tra.gov.au/Domestic/national-visitor-survey-methodology>

