TROPICAL NORTH QUEENSLAND

Mountain Biking Market Analysis

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Where rainforest meets the reef

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ACKNOWLEDGEMENT

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

INSPIRING SOLUTIONS FOR PEOPLE AND PLACES

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Summary

The opportunity

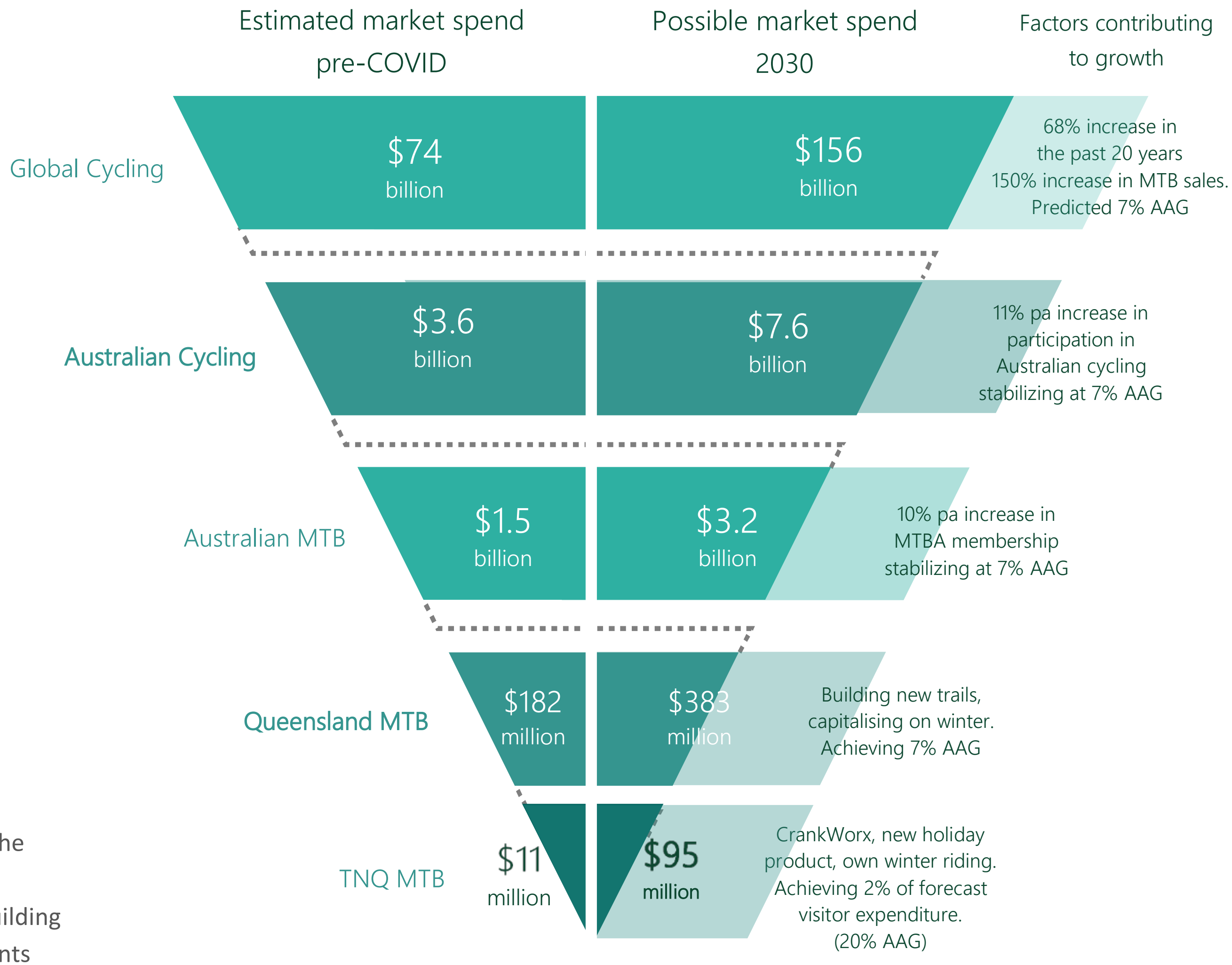
Cairns has the MTB credentials but more product is needed. Cairns has significant MTB credentials and a mature tourism system that could evolve to support it, however it is in its infancy in terms of product and experience for people seeking to MTB whilst on holiday or travel specifically to MTB.

Global growth in popularity. MTB sales growing more than 150% during COVID. There is a significant opportunity in MTB for TNQ, with global and national participation rates in all types of cycling growing, especially during COVID.

TNQ potential growth. Building on an estimated average annual growth of 7% in global and national MTB travel expenditure, CrankWorx, new and innovative holiday product, and owning Australasia's winter riding product could build TNQ's MTB market to 2% of total expenditure. Based on Deloitte's modelling, this will be around $95 million in 2030, equating to just over 20% average annual growth.

Two-pronged approach needed: Holiday and passion-first. The best opportunity for TNQ is to build the Holiday market's participation in MTB through product development, whilst building credentials with the MTB market through the CrankWorx events over the coming three years.

New Australian trails an opportunity. Expansion of trail networks in other destinations presents an opportunity as interest in the sport expands and local enthusiasts look for new riding experiences.



Priorities to build the TNQ MTB experience

- Improve the **diversity and length** of the current trail network.
- Focus on **quality experiences** that reflect the 'See Great. Leave Greater' brand ethos than focuses on enrichment through connection with nature and culture.
- Build **commissionable product** for the MTB experience.
- Build a **connected network** of trails, services, and opportunities for food and drink experiences.
- Ensure the **information network** supporting MTB product is brand coordinated and aligned, with accurate difficulty ratings and information.

Recommendations

1. **Gather and build data.**

   Establish a new mechanism to measure visitor MTB activity in TNQ to establish a baseline and a metric for measuring the effectiveness of marketing and product development.

2. **Market for the southern winter**

   Winter is not a favoured time for MTB riders in the cooler climates. This provides an excellent opportunity for TNQ to offer the 'year-round' experience as the southern winter coincides with the best times to ride in the region.

3. **Advocate for more product that meets the Holiday market's needs**

   If crafted well, TNQ could provide a compelling and exciting product ecosystem that has the potential to expand both the market and the average length of stay. Engaging with existing products such as new breweries and distilleries in the region would be particularly attractive to the market.

4. **Focus on NSW, Victoria and NZ Destination MTBers**

   The range of riding locations in these places and size of population ensure an engaged local riding fraternity, many of whom are seeking new and different places to travel to in groups.

5. **Work to build a high capacity MTB operator network**

   Critical to the experience of MTB riders is the shop, uplift or hire station. Working with these operators in the Region to offer on-ground support to visitors, customise product for the market's needs and build effective marketing strategies is a straightforward way of accessing the market, supporting local business and providing a better experience for visitors.

6. **Provide connected and real-time information**

   Working to incorporate Trailforks trail reports and information on track closures, degrees of difficulty, etc. as a real-time input into information for visitors will improve the TNQ riding experience.

1 Introduction

Mountain Biking (MTB) is growing as a sport and recreation pastime globally. Many places are seeking to capitalise on the opportunity presented by this growing market that is generally affluent[1] and has an appetite for expansion of skills, new experiences and locations.[2]

As a nature-based, active pursuit, MTB is particularly well aligned to the TNQ offering in terms of market preferences and product offer. The region has its own active MTB population, with thriving clubs that have been instrumental in the development of a number of local tracks and trails. In particular, the Cairns MTB club based at Smithfield was the first to bring MTB World Cup events to Australia in the 1990s, hosted the World Cup 2014-2016 and the World Championships in 2017, and a national round of the MTBA series.[3]

The internationally recognised tracks located in an internationally recognised destination, with significant supporting infrastructure and attractions, places TNQ in an advantageous position to develop the MTB experience.

This market analysis explores the potential size, value, characteristics and preferences of the Holiday MTB and Destination MTB markets for Cairns. It considers the TNQ MTB product offering and identifies some key competitors that may provide inspiration for further development of the market.

[1] Buning, Cole, and Lamont (2019)

[2] Moularde and Weaver (2016)

The data presented in this report is drawn from a number of secondary sources, most notably the recent AusCycling report on the value of MTB to the economy, Tourism Research Australia data, AusPlay participation data, and Deloitte Access Economics forecasting commissioned by Tourism Tropical North Queensland. As there has been no primary research conducted to support this, a number of assumptions and extrapolations have been made on existing data to provide a best estimate rather than concrete figures. It is important to read this document in this context. In particular, no data source has identified the number of visitors who engage in MTB whilst on holiday in the region, so please exercise caution when interpreting these figures.

1.1 Definitions of riders

The recent AusCycling Report published in March 2021[4] segments MTB riders in Australia into five categories and evaluates their market potential – see Table 1. Any of these five categories could travel as Destination Mountain Bikers or Holiday Mountain Bikers. It is possibly more likely that the Leisure and Enthusiast markets will be Holiday Mountain Bikers, but this may not always be the case. On a family holiday, even a competitive mountain biker might be on holiday first and cycle as part of a broader trip.

[3] Cairns Mountain Bike Club (2021)

[4] AusCycling (2021)

Table 1. AusCycling categories of riders

Market	Description	Market potential*
Leisure	Includes general cyclists of all ages and abilities and is potentially the largest market. Typically, they ride infrequently, often have limited skills and require very accessible trails. They are not members of clubs are they are more likely to use highly accessible routes close to home or make the journey to trail facilities with amenities and services such as bike hire, cafes, and toilets.	Significant
Enthusiast	Enthusiasts are purely recreational mountain bikers with moderate skills and variable fitness, and ride weekly. They are typically aged 29-49 and form the majority of mountain bike riders. They typically don't compete in events and they possess limited outdoors experience. They prefer trails with good trail signage and seek technical but not too challenging trails. Enthusiast mountain bikers are the most likely to take short breaks to different areas.	Significant
Sport	Competitive mountain bikers, who ride regular routes multiple times a week and are members of mountain bike clubs, they are a small but influential market. They are willing to seek less accessible trails and have high fitness level and are technically proficient but may have limited outdoor skills. They ride a very wide variety of trails.	Small but influential
Independent	Skilled outdoor enthusiasts who ride once a week and are technically proficient with a good level of fitness. Generally, they are a small market. Often involved in other outdoor activities, they are capable of planning their own rides and ride a very wide variety of trail classifications. They adventurous aspect is more important than the technical challenge and they seek more remote trails.	Small
Gravity	Highly skilled technical riders who seek very challenging trails, typically ride at least once a week and are often members of clubs. They represent a small market that required purpose-built trails, which are repeatedly used in a concentrated manner. Gravity riders seek specific trails with the highest classification	Small but growing rapidly

*Identified by AusCycling

The 2015 TNQ MTB Strategy identifies the MTB market as being comprised of 'core' and 'non-core' mountain bikers. Non-core mountain bikers are people that ride mountain bikes, but do not identify themselves as being 'mountain bikers' and who may have little or no knowledge of the various disciplines within the sport. Non-core mountain bikers include:

- Complete novices
- Road bikers that occasionally ride MTB
- Families seeking safe enjoyable places to ride away from cars
- School groups (often guided by tour operators)
- Off-road bike tourers and more.

While they may not typify the average mountain biker, these non-core mountain bikers are important users of trails, as they represent a large potential market of future core mountain bikers. As non-core mountain bikers discover the benefits of mountain biking and become more experienced and fitter, they may potentially move into the core mountain biker group.

Core mountain bikers on the other hand, readily identify themselves as mountain bikers, and are likely to differentiate themselves according to their preferred mountain biking disciplines. Key attributes of core mountain bikers are:

- High levels of expenditure on gear and equipment
- High amount of time spent mountain bike riding
- High willingness to travel to go mountain biking
- High likelihood of participating in competitive events.

Within the group of core mountain bikers, it is possible to further differentiate riders based on their riding preferences, or preferred mountain biking disciplines. The recent AusCycling report breaks down the MTB disciplines, shown in Table 2.

In estimating the characteristics of the MTB market for a destination, it is valuable to understand the match between the disciplines accommodated by the product infrastructure and the preferences of the market. In Cairns, it has been identified that the Destination MTB market is highly competitive but may be activated through events such as Crankworx and the World Championships. For much of the year whilst these events are not operating, there is the opportunity to both facilitate Destination MTBers who are seeking the thrill of riding on acclaimed trails and Holiday MTBers who are seeking to enrich their TNQ experience by going for a ride.

Table 2. AusCycling MTB disciplines 2021

	**Cross Country (XC)**	Primarily single-track oriented with a combination of climbing and descending, and natural trail features of varying technicality. Cross country trails appeal to the majority of the market and can also cater for timed competitive events. Typically, bikes are lightweight with shorter travel dual suspension or have no rear suspension.
	**Flow (FL)**	Flow trails typically contain features like banked turns, rolling terrain, various types of jumps and consistent and predictable surfaces. Flow trails do not contain abrupt concerns or unforeseen obstacles. Bikes are typically light-medium weight with medium-travel dual suspension.
	**All Mountain (AM)**	Similar to Cross Country and primarily single-track oriented, with greater emphasis on technical descents, with nontechnical climbs. All mountain trails can cater for timed competitive events. Bikes are typically light weight with medium-travel dual suspension.
	**Gravity/Enduro (GE)**	Like All Mountain with greater emphasis on steep, fast, technical descents. Gravity / Enduro trials can cater for timed competitive events. Gravity / Enduro trails appeal to more experienced riders who enjoy technical descents but are still happy to ride back to the top of the trail. Bikes are typically medium to long-trave dual suspension and are built for strength.

Downhill (DH)

Purely descent only trails with emphasis on speed and technical challenge and focus on skill development. These trails can cater for timed competitive racing. Downhill trails typically appeal to the more experienced market, however green (easy) downhill trails are emerging to cater for all experience levels. Downhill trails usually require uplift to the trailhead via chairlift or vehicle shuttling. Bikes are designed for descending and are typically long-travel dual suspension and built for strength over weight.

Freeride (FR)

Typically, descent focused trails with emphasis solely on technical challenge and skill development. Trails feature both built and natural terrain technical features with a focus on drops and jumps. Appeals to the more experienced market and caters for competitions judging manoeuvres and skills. Bikes typically medium to long-travel dual suspension and are built for strength.

Park (PK)

Built feature environments with an emphasis on manoeuvres, skill development and progression. Appeals to a wide market including youth and can cater for competitions judging aerial manoeuvres. Can include Jump and Pump tracks and Skills Parks. Typically, dirt surfaced but can include hardened surfaces. Bikes are typically built for strength, with short travel suspension.

Touring (TO)

Typically, long distance riding on reasonably uniform surface conditions and lower grades. Touring trails are dual direction linear trails or long-distance circuits with a focus on reaching a destination. Touring trails can include rail trails, access/fire roads and single track. While there is a limited market for long distance mountain biking, touring trails can be ridden in sections making them accessible to all. If carrying panniers bikes are usually robust with limited suspension, however, for short sections or day trips most mountain bikes are suitable.

Photo Credit: BMC, Chris Ord, Gravity Enduro South Australia, Unsplash, Westcycle,

2 The Market

Expenditure in a destination is generally influenced by visitor numbers, visitor nights, and yield. Developing the MTB market provides the opportunity to expand all of these, but particularly nights and yield, as a more diverse product with an authentic, credentialled experience such as MTB in Cairns can expand length of stay and willingness to spend.

It is critical that any product development aligns with the brand of the region. The concept of 'See Great. Leave Greater' should guide the development of MTB products in terms of quality and experience. Underpinning this concept is the idea that people will not forget how the experience of TNQ made them feel. MTB can provide a connected, authentic and rewarding experience within a tropical holiday, offering an ideal platform for connection with travel companions, the unique and world-class environment, indigenous stories, history and the people of the region today.

Developing the MTB market aligns with TTNQ's aims to:

- **Grow share,** starting with a focus on the domestic market, to increase the region's awareness, to boost share of nights and voice
- **Drive visitor spend** through diversification of market mix and increase overnight visitor spend
- **Ensure sustainable growth** through driving dispersed visitation and supporting local businesses and jobs
- **Increase satisfaction** through providing a diversified product that is outside the traditional Cairns Reef and Rainforest perception.

Additionally, MTB closely aligns with three of the four regional brand pillars:[5]

Brand Pillar 1: Explore iconic landscapes

Brand Pillar 2: Discover unique nature and wildlife

Brand Pillar 4: Choose your own adventure.

These brand pillars emphasise unique and enriching interactions with the rainforest, wildlife, aboriginal culture, and landscapes. MTB provides a platform to engage with these pillars and to experience adventure at the same time. If developed in a particular way, MTB experiences could also work towards Brand Pillar 3: Experience Everyday Luxury.

2.1 Travelling MTB Markets

From a tourism perspective, the MTB market is broadly divided into those who travel to mountain bike:

1. 'Holiday first' Holiday Mountain Bikers
2. 'Passion first' Destination Mountain Bikers.[6]

Although the travel and biking behaviour of these two segments are considerably different, they are both important to the success of a destination.

[5] TTNQ (2020)

[6] TRC (2017)

2.1.1 Holiday MTB Markets

The Holiday MTB Market is the market of people who go on holiday to TNQ for any reason other than the express purpose of mountain biking, and then, whilst on holiday or during their overall planning, decide to mountain bike as part of a broad holiday experience. This activity could lead to a passion for the sport, increased engagement in the destination, ongoing association with the destination as a place to mountain bike, a longer stay and potentially future visits.

Mountain biking trails in other places are not normally competitors for this market unless they are forming part of a broader destination offering of activities. If a person mountain bikes at Derby in Tasmania whilst on holiday, it is likely that this will build an enthusiasm for the sport, which will potentially grow the attractiveness of TNQ as another place to ride.

Holiday MTBers do not always bring their mountain bikes with them, if they have one at all. They value a range of trail options that are accessible, accurately labelled in terms of difficulty, with a supporting shop/gear hire hub that provides welcoming service and good advice. They value transport connections and uplifts to trails or trailheads within riding distance of the town or their accommodation.

Holiday MTBers may not access online application tools such as Trailforks or Strava to gather an idea of where to ride and levels of difficulty, so access to clear and accurate information with recommendations for different levels of difficulty is essential.

Promoting riding options as part of the total TNQ experience early on in the customer journey cements the idea of riding as part of the holiday and potentially expands the length of stay to accommodate the opportunity. This will most likely be the case if seamless options are provided in terms of gear hire, uplift, and ability-aligned trail access. Trail quality, wayfinding, appropriate trail length and a clear reward in terms of access to nature, solitude, features such as rivers or views are also key factors for Holiday MTBers.

[7] Moularde and Weaver (2016)

2.1.2 Destination MTB Markets

The Destination MTB Market are those who travel for their passion first – for the express purpose of mountain biking. Typically, but not always, they will bring their mountain bikes with them on their trip and will value transport and accommodation that provides safety and security for their bikes. Hire shops provide the opportunity to try new and different models of bikes, potentially try an e-bike, and to provide local knowledge on the best tracks, ‘off the beaten tracks’ and good places to eat and drink.

A New Zealand study found that the quality of trails and riding opportunities are at the core of mountain bikers’ destination preferences, but for ‘serious’ riders, the destinations are evaluated as they seek to collect new experiences that align with their skill level[7]. These people have intermediate to more advanced riding skills, regularly travel to mountain bike and would likely have visited other Australian or international MTB destinations. These riders seek high quality trails with good supporting infrastructure in scenic/natural locations.

Research conducted by Tourism Tasmania[8] has identified two sub-segments of the ‘MTB Enthusiast’ market:

1. **Professionals** who lead busy urban careers seek escapes from the pressure of their busy metropolitan lives, and mountain biking provides a high-adrenaline outlet with a connection to nature. These professionals are time constrained, typically only travelling for short breaks and often lock in set times during the year for their holidays. Domestic travellers tend to book well in advance, with individuals typically booking 1-3 months prior and groups booking 3-6 months in advance
2. **Retirees**, or those nearing retirement, will often travel via group packages. They have more time, are inclined to mountain bike with high-end gear and enjoy the finer things in life and looking after their fitness.

[8] Tourism Tasmania (2019)

A study in the US[9] has shown that there are both push and pull factors for destination mountain bikers:

- **Push factors:** physical exercise, thrill/escape, skill in relation to the difficulty/risk of the trail, and meeting a challenge. Participants also noted sociability among mountain bikers created a positive orientation toward the activity, while peer influence affected the timing and location of rides
- **Pull factors:** site attributes such as fast, flowy single track trails to nearby amenities.

2.2 Potential size and value

Prior to COVID, TNQ received just over 3 million visitors per year,[10] 26% of whom were international visitors and 74% domestic.[11] Descending to 1.6 million visitors in the YE 2020, COVID has impacted the TNQ region significantly.[12] International visitation has decreased by 84% and domestic overnight visitation by 35%[13]. Whilst this paints a dire picture, COVID travel restrictions have also provided an opportunity for Australians to experience TNQ without competing with the international market, as well as substituting for holidays that may have been taken outside the country. This has been supported by the *Holiday Here This Year* domestic campaign. New Zealand has also opened up as an opportunity to expand traditional markets as the Trans-Tasman bubble becomes established.

Deloitte Access Economics have forecast that whilst there is significant pain for the TNQ industry in the immediate COVID era, domestic expenditure is expected to recover to 'without COVID' levels by around 2024. International expenditure is likely to recover to pre-COVID levels by 2025, however it is not expected it will fully recover to 'without COVID' levels even by 2029, seen in Figures 1 and 2.

Figure 1. Domestic expenditure outlook to 2029[14]

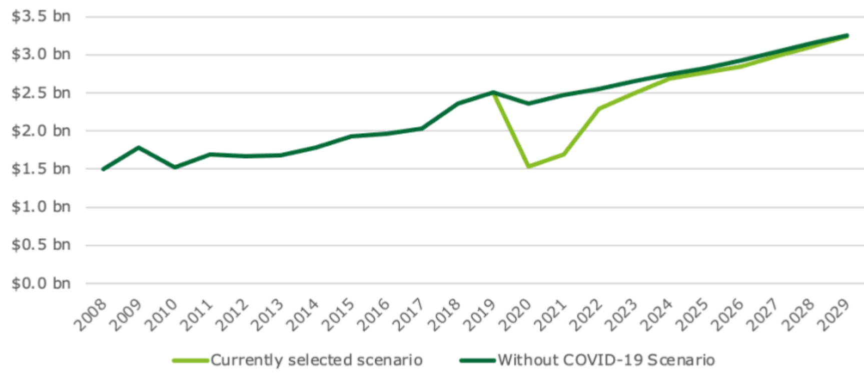
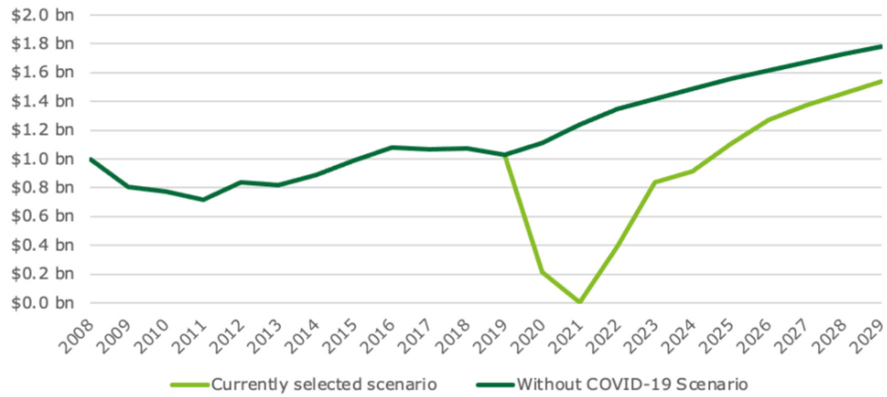


Figure 2. International expenditure outlook to 2029[15]



[9] Taylor (2010)
[10] TEQ (2021b)
[11] TTNQ (2020)
[12] TTNQ (2020)
[13] TEQ (2021a)
[14] Deloitte Access Economics (2021)
[15] Deloitte Access Economics (2021)

2.2.1 The International Market

Whilst the rest of the world is unlikely to be accessible for some time, when they do return, they will be lucrative markets for MTB in TNQ. Providing high yields and engaged travellers who stay longer and spend more, the European markets in particular are more likely than the average traveller to engage in cycling whilst on holiday in Australia.

Figure 3 shows that the size of the European and UK markets participating in cycling whilst on holiday in Australia far outstrips any other international markets. Table 3 shows the relative participation in cycling for these major source countries whilst on holiday in Australia. This also indicates that Europe and the UK are far more likely to participate in cycling whilst on holiday in Australia than the average international visitor, with a 10-11% participation rate compared with 5.7%.

Whilst Chinese visitors rank relatively highly on cycling, they are not considered a priority market for MTB in TNQ. This is due to a general preference in the Chinese market at the moment for more curated natural experiences, although this situation should be monitored as the Chinese MTB market may evolve.

In terms of visitors to TNQ, this of course may be more nuanced, as the types of people who are visiting the tropical north are likely to be more disposed to nature based activities and therefore this participation rate may be higher for visitors to the region.

Figure 3. Visitors participating in cycling whilst on holiday in Australia by origin (4 year average 2016-19)[16]

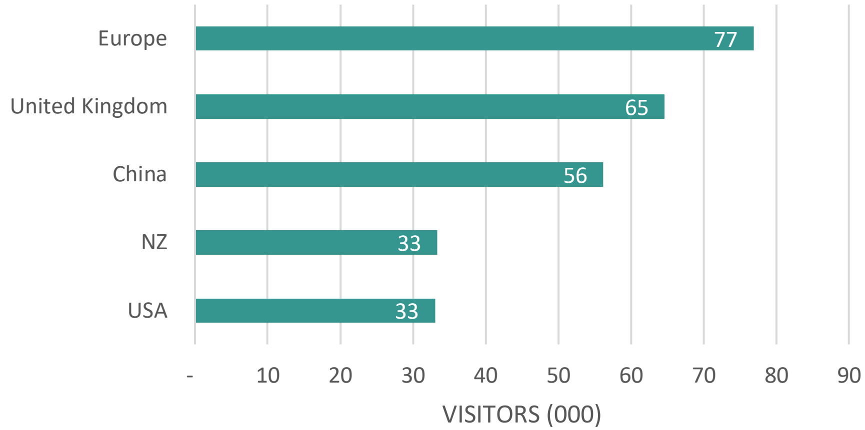
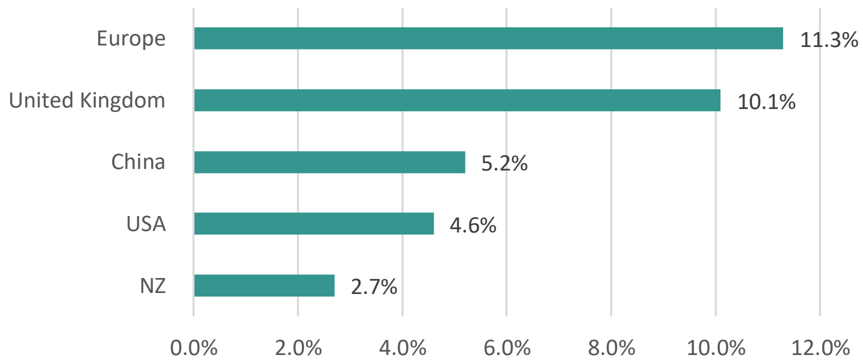


Figure 4. Visitors participating in cycling whilst on holiday in Australia as a percentage of total visitors from each country or region[17]



[16] Tourism Research Australia International Visitor Survey.

[17] Tourism Research Australia International Visitor Survey.

Table 3. International participation in cycling in Australia by origin[18]

Country	Arrivals YE Mar 2020	Cycling whilst in Aus (4 year average 2016-19)	% Cycling approx. whilst on holiday in Aus
All Int'l visitors	**8,050,925**	**458,676**	**5.7%**
Europe	683,281	76,906	11.3%
UK	637,399	64,671	10.1%
China	1,081,118	56,213	5.2%
NZ	1,241,512	33,364	2.7%
USA	713,835	33,029	4.6%

Whilst it is not specified what type of bikes these people are riding, the figures in this table present an opportunity for TTNQ to engage with people who would cycle on holiday. In particular it indicates that Europeans are far more likely to engage in cycling whilst on holiday and may present an opportunity once they become an accessible market again. This is a positive indication for TTNQ as Deloitte Insights have shown that European nights are forecast to increase significantly for the region in the next ten years (Figure 5).

European participation in cycling is significant. In 2021, Germans owned 62 million bikes, Italy 23 million and the UK 20 million[19]. In the US, the Outdoor Industry Association reports that there are just under 9 million Mountain Bikers who ride on non-paved surfaces in the country, and road biking, MTB and BMX is consistently one of the top four most popular activities in the country[20]. With over 17% of US residents participating in some kind of cycling, there is an opportunity to expand the current 4.6% of visitors currently cycling whilst on holiday in Australia.

[18] Tourism Research Australia International Visitor Survey.

[19] Bicycle Guider (2021)

2.2.2 The New Zealand market

In the short term, the domestic and NZ markets are critically important to the recovery of the TNQ region.

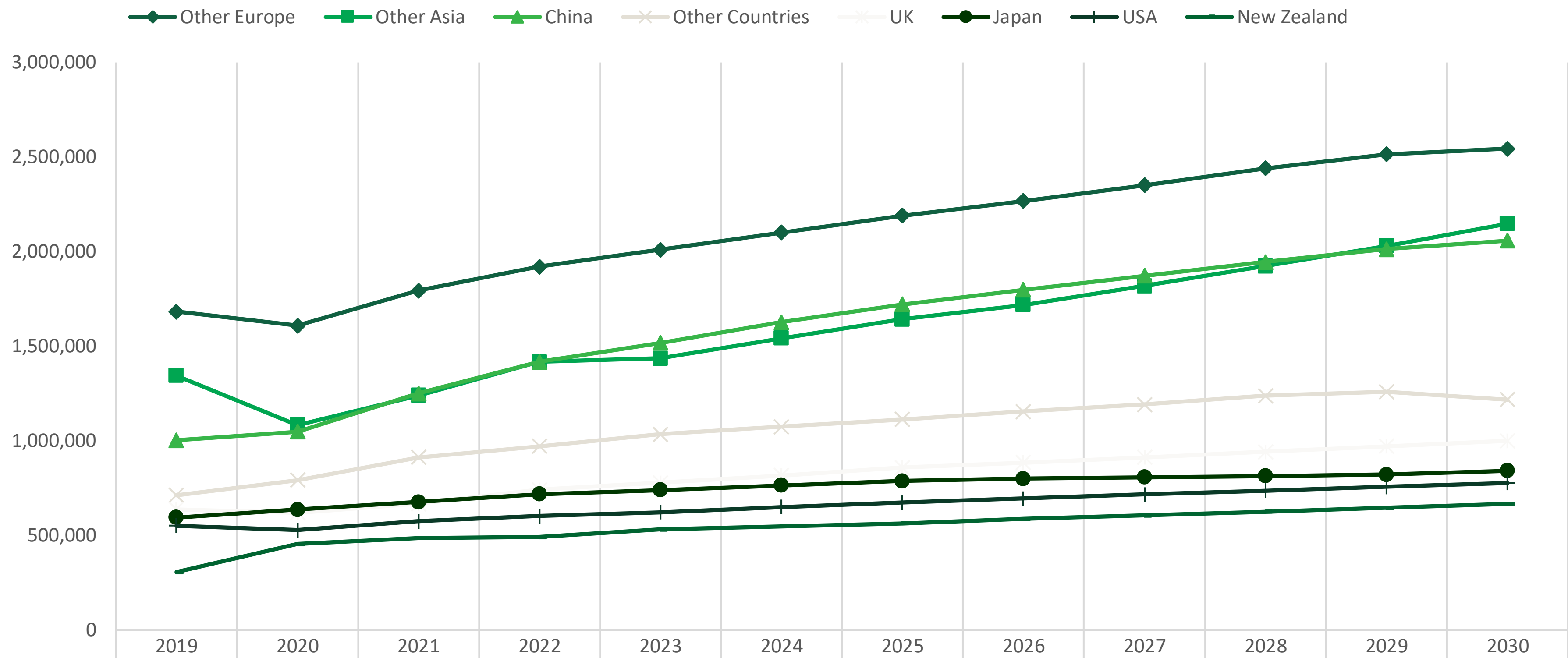
Participation trends captured by Sport NZ in 2019 shows that across NZ, about 10.2% of the population are interested in mountain biking, 6.2% participated in the previous year, 4.0% are likely to participate in the next six months and 1.4% attended a mountain biking event[21]. Translated into real figures, this looks like an estimated available market of New Zealanders interested in Mountain Biking of just under 500,000 people. Although not all of these people may wish to travel, or MTB whilst travelling, it is a starting point of people interested in the sport.

Additionally, 19.6% of New Zealanders are interested in cycling as a sport, translating to around 960,000 people. These people may also be the people interested in MTB, but this still indicates a significant market opportunity to engage New Zealanders in MTB once they travel to TNQ.

[20] Outdoor Industry Association (2020)

[21] Sports NZ (2019)

Figure 5. Forecast nights by source market for TNQ[22]



	2019	2020	2021	2022	2023	2024	2025	2026	2027	2028	2029	2030
Other Europe	1,682,889	1,609,368	1,793,273	1,920,650	2,009,571	2,101,157	2,191,284	2,268,542	2,350,733	2,441,066	2,514,425	2,544,830
Other Asia	1,344,994	1,082,838	1,240,596	1,416,862	1,436,373	1,542,029	1,642,154	1,718,158	1,818,101	1,922,903	2,029,820	2,147,502
China	1,003,193	1,048,356	1,250,163	1,417,491	1,518,047	1,627,816	1,721,713	1,798,608	1,873,416	1,944,571	2,012,934	2,057,764
Other Countries	712,176	793,067	913,030	971,736	1,035,402	1,074,544	1,113,603	1,154,644	1,191,734	1,237,781	1,259,365	1,217,676
UK	637,807	619,307	667,720	740,706	778,574	816,870	858,975	884,357	912,196	942,249	971,609	1,000,372
Japan	594,084	635,866	677,225	718,102	740,164	765,245	788,454	799,692	807,966	814,657	821,008	841,340
USA	551,437	528,792	574,976	602,832	623,143	650,681	673,769	695,054	716,528	736,947	756,996	776,984
New Zealand	306,392	454,510	486,722	491,220	531,605	548,169	564,642	587,601	605,538	625,179	645,955	666,738

[22] Deloitte Insights Forecasting for TNQ

2.2.3 The Australian market

Any person engaging in mountain biking whilst on holiday is likely to at least be able to ride a bike and is more likely to be interested in the pastime at home. In Australia, the MTB market size has been estimated at 388,900, just under 2% of the population. Just under 3 million people (14% of the population) participate in cycling of some sort.[23]

In Australia, around 4 million overnight trips including cycling are made each year.[24] Of these, just over 1 million trips were made including MTB. This equates to around 3.4% of all trips made in Australia including cycling of some sort and 0.9% of all trips including MTB. Whilst these figures seem low, in real numbers, they represent a comparatively large market opportunity for the TNQ region. COVID has seen this number drop significantly, however as domestic travel reinstates, the historical data and increasing interest in MTB suggests this figure will continue to increase. Interestingly, Australians are also the most likely international visitors to ride bikes whilst on holiday in NZ. In 2019, just over 58,000 Australians rode a bike whilst they were on holiday in NZ.[25]

Table 4 shows the relative participation in cycling whilst travelling by source market in Australia. Whilst NSW and QLD provide the largest market opportunity, Victorians and people from Western Australia show a slightly higher percentage of participation in cycling whilst on holiday than the average. In terms of nights, Victorians over index on the length of holidays including cycling.

Further to this, the CQU Cairns Airport Visitor Exit Survey identifies that "To have fun" and "Experience the natural environment" are the two most important motivations for first time visitors to the region.[26] These findings suggest that MTB would be a close fit for the motivations of visitors to the TNQ region.

In the short term, an estimate of the Australian and New Zealand markets are likely to represent the majority of the market opportunity for TTNQ. In the longer term, other international source markets may also present opportunities.

[23] AusPlay (2020)
[24] Until 2019. Tourism Research Australia (2021)
[25] Figure.NZ (2020)
[26] CQU 2020

Table 4. Cycling market size and nights in Australia[27]

	Total travelling market (000) 2019	Cycling visitors (000) 2016-19*	Participation in cycling %	Total nights (000) 2019	Cycling nights (000) 2016-19*	% Cycling nights
NSW	38 968	648	1.7%	122 556	2,957	2.4%
VIC	29 748	658	2.2%	83 510	2,833	3.4%
QLD	25 914	325	1.3%	102 952	1,575	1.5%
SA	8 094	110	1.4%	27 885	514	1.8%
WA	11 022	247	2.2%	50 235	1,002	2.0%
TAS	3 217	51	1.6%	12 816	298	2.3%
NT	1 703	15	0.9%	9 202	133	1.4%
ACT	3 203	58	1.8%	8 741	258	3.0%
Total	**117 448**	**2,111**	**1.8%**	**417 907**	**9,570**	**2.3%**

*4 year rolling average to compensate for small sample sizes

[27] Tourism Research Australia National Visitor Survey

Following on from the visitor numbers and nights, Table 5 shows that NSW is the most lucrative opportunity for expenditure of people cycling whilst on holiday. The Northern Territorians and Western Australians do spend more per trip, but this is likely to do with higher airfares from their regions.

Table 5. ALOS and expenditure of Australians cycling whilst on holiday[28]

	Average length of stay total 2019	Average length of stay cycling 2016-19*	Cycling while on holiday expenditure ($M) 2016-19*	Cycling while on holiday spend per trip ($) 2016-19*	Cycling spend per night ($) 2016-19*
NSW	3.1	4.6	489	754	165
VIC	2.8	4.3	400	608	141
QLD	4.0	4.9	226	695	143
SA	3.4	4.7	66	598	128
WA	4.6	4.1	192	777	191
TAS	4.0	5.8	30	592	102
NT	5.4	9.1	12	836	92
ACT	2.7	4.4	35	611	138
Total	**3.6**	**4.5**	**1,450**	**687**	**151**

*4 year rolling average to compensate for small sample sizes

[28] Tourism Research Australia National Visitor Survey

2.2.4 Destination MTB market

Recent research from AusCycling indicates that around 67% of MTB riders travel on MTB specific intrastate holidays and around 43% travel on MTB specific interstate holidays[29]. The people who travelled interstate for the primary purpose of MTB typically travelled 1-2 times per year, and spent around $2,485 per trip. If the size of the MTB market in Australia is 388,900 as estimated by AusPlay,[30] then this equates to around 167,000 interstate Destination MTB travellers taking around 250,000 trips and spending around $623 million each year.

Although Queensland attracted very few of the destination MTB interstate market in this study, losing out to Tasmania, Victoria, ACT and NSW (Table 6 below), the TNQ region has the potential to mobilise the market with new, high quality iconic trails that generate 'buzz' with spectacular, unique imagery, supplemented by the attraction of the Great Barrier Reef and Wet Tropics World Heritage Area and mature tourism offering. TNQ is an ideal winter riding destination for the southern states and New Zealand, and this market enjoys new challenges and variety in their riding experience.

Whilst there is significant opportunity for TNQ here, attracting these markets can be challenging because there is significant competition for these riders in destinations that are well equipped to service their requirements.

[29] AusCycling (2021)

[30] AusPlay (2020)

Table 6. State of residence by destination of holiday[31]

State of Residence	Destination of Holiday							
	ACT	**NSW**	**NT**	**QLD**	**SA**	**TAS**	**VIC**	**WA**
ACT	0 (0.0%)	28 (44.4%)	2 (3.2%)	4 (6.3%)	1 (1.6%)	8 (12.7%)	17 (27.0%)	3 (4.8%)
NSW	107 (32.1%)	0 (0.0%)	2 (0.6%)	42 (12.6%)	8 (2.4%)	88 (26.4%)	76 (22.8%)	10 (3.0%)
NT	2 (9.5%)	4 (19.0%)	0 (0.0%)	2 (9.5%)	5 (23.8%)	1 (4.8%)	6 (28.6%)	1 (4.8%)
QLD	15 (7.9%)	57 (23.3%)	0 (0.0%)	0 (0.0%)	5 (2.7%)	81 (43.1%)	27 (14.4%)	3 (1.6%)
SA	3 (10.0%)	7 (23.3%)	0 (0.0%)	0 (0.0%)	0 (0.0%)	6 (20.0%)	13 (43.3%)	1 (3.3%)
TAS	2 (9.5%)	4 (19.0%)	0 (0.0%)	4 (19.0%)	0 (0.0%)	0 (0.0%)	11 (52.4%)	0 (0.0%)
Vic	14 (8.9%)	37 (23.6%)	8 (5.1%)	20 (12.7%)	17 (10.8%)	56 (35.7%)	0 (0.0%)	5 (3.2%)
WA	0 (0.0%)	3 (11.5%)	0 (0.0%)	3 (11.5%)	1 (3.8%)	14 (53.8%)	5 (19.2%)	0 (0.0%)
Total	**143 (17.0%)**	**140 (16.5%)**	**12 (1.4%)**	**78 (9.2%)**	**37 (4.4%)**	**254 (29.9%)**	**161 (19.0%)**	**23 (2.7%)**

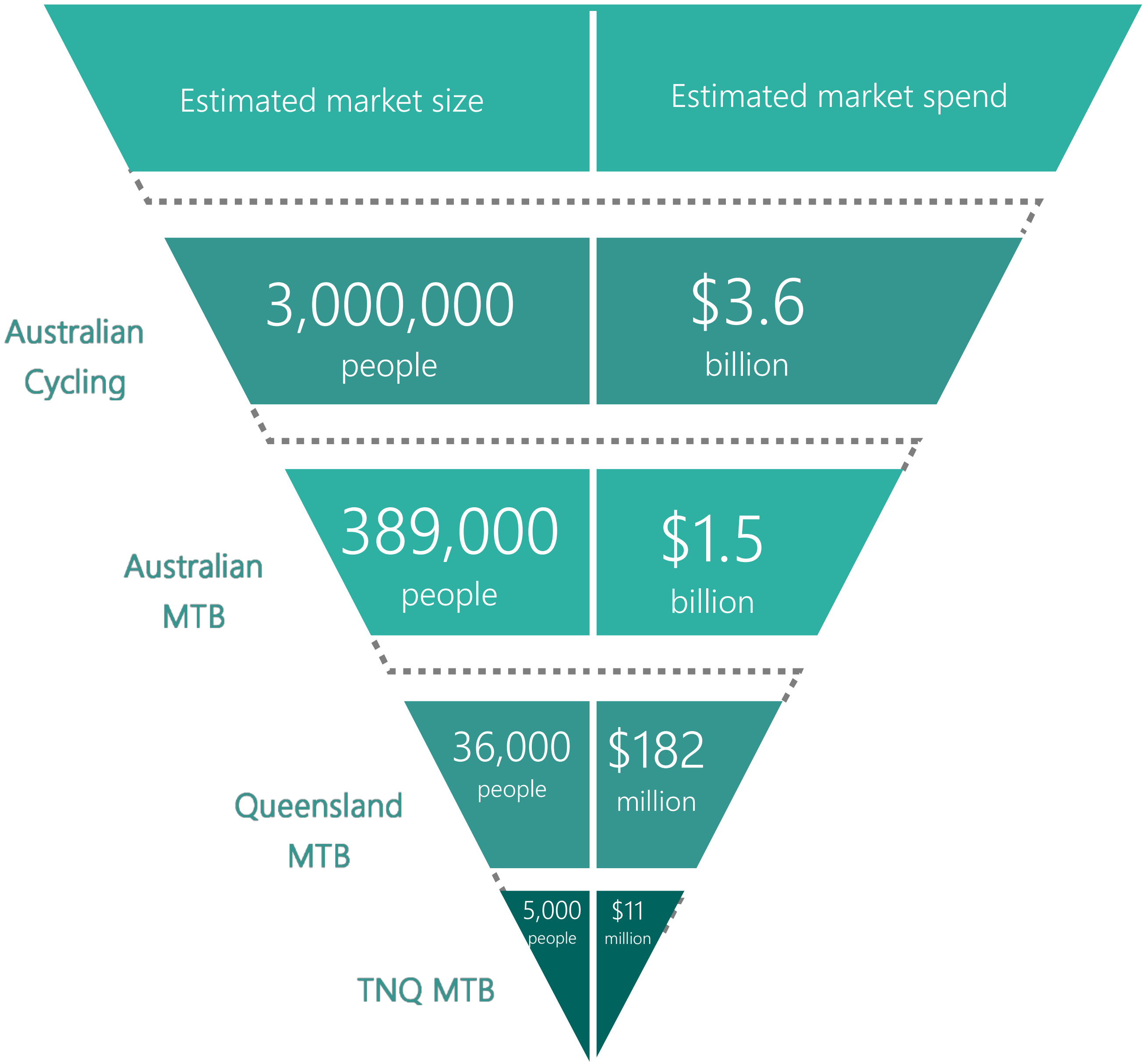
[31] AusCycling (2021)

2.2.5 Market size summary

Drawing on indications of the size of the MTB market from the above data, an estimation of current MTB market size has been made for Australia, Queensland and TNQ. The only data source available on cycling or MTB in the region at the moment is the National Visitor Survey, and this cannot show where people cycled, just that they did at some stage on their holiday that included TNQ. The CQU Cairns Airport Visitor Exit Survey has not previously asked about MTB activities, however this is worth exploring for future data collection.

It is unclear exactly how many people currently or pre-COVID mountain biked whilst they were on holiday in the region. Although Tourism Research Australia provides data on the population who ride at some stage during their journey, this cannot be directly attributed to any specific destination. The next section explores what market size could be achieved with a full complement of MTB product in the region. With the current range of products and drawing on indications from relative numbers of rides in other locations, it is estimated that around 0.2% of TNQ's visitors engage in Mountain Biking whilst they are there. These figures are represented in Figure 6 over the page.

Figure 6. MTB Market size in Australia, Queensland and TNQ 2020



2.2.6 Potential future size of the market for TNQ

Tasmania's Visitor Survey data can provide an insight into travellers who mountain bike whilst on holiday. Of the 1.3 million visitors who visited Tasmania in the YE March 2020 (interstate and international), 27,000 of them participated in mountain biking, with an average annual growth of 11% over the past 5 years. That equates to around 2% of visitors. Given the diversity of the Tasmanian offering and the size of the state, it is reasonable to consider that TNQ could convert visitors at a higher rate.[32]

Being destination specific, the Tourism Tasmania data shows a clear percentage of people who MTB whilst on holiday (either Destination or Holiday MTB) with a full complement of trail options, ancillary services, transport and uplift and accommodation. The scale of Tasmania is also comparable to the TNQ region, with geographic and landscape diversity and with a mature tourism market. This gives an indication of the potential for MTB market development in TNQ by 2025 and 2030.

2.2.7 2025 & 2030 Horizons

2025 is four years away. By then the Crankworx events will have occurred and Cairns will once again be on the world stage for MTB. The ability of the TNQ region to capitalise on this beyond the events depends on the development of MTB tourism products, visitor-ready trails, infrastructure and ability of the industry to mobilise out of an historically difficult time. Given these opportunities and constraints, including securing investment, building and market development as well as planning requirements and approvals, it is unlikely that TNQ will have developed a full suite of MTB product by 2025.

The average length of stay (ALOS) in TNQ in 2019 was 5.04 nights and in 2020 it was 4.83.[33] It is likely that this has decreased due to the decrease in international visitors, who normally stay longer than domestic visitors. As markets adapt to the COVID era and travel within the Trans-Tasman bubble stabilises, it is possible that the domestic and NZ market may extend their stays to compensate for the lack of international travel. For consistency in the data, an assumption is made that the ALOS will recover to an average of 5 nights over the next four years. Investment in MTB product may extend the length of stay for those who engage in MTB whilst on holiday, however the nature of the types of new product are unknown and have not been accounted for in this estimate.

It is difficult to accurately estimate the growth of the MTB market in the future for Cairns as this relies heavily on the development of trails and experiences that meet the needs of the market in the region. Currently, there is very little product and limited trails, as detailed in the TNQ MTB Product section below.

The projections in Figures 7 and 8 below have been made based on the Deloitte Access Economics Forecasting for the region with these assumptions:

- ALOS remains 5 nights
- The percentage of visitors engaging in cycling in the region grows from an estimated 0.2% of total visitors in 2020 to 1.4% in 2023, off the back of new product development activated by the Crankworx events. In 2025 it is estimated to stabilise to 2.0% of total visitation for some years, as product establishes and stabilises
- The percentage of visitation is applied to the percentage of expenditure. This is difficult to estimate as those engaging in MTB are also generally higher income earners, however tourists who cycle on holiday generally spend less than those who don't
- Although the MTB market is growing, so is the range of MTB options at destinations. A base level of being able to command 2% of the visiting market is therefore estimated to remain the same.

[32] Tourism Tasmania (2020)

[33] TEQ (2021)

Figure 7. Estimated MTB visitor numbers to TNQ using the 2% assumption in different scenarios[34]

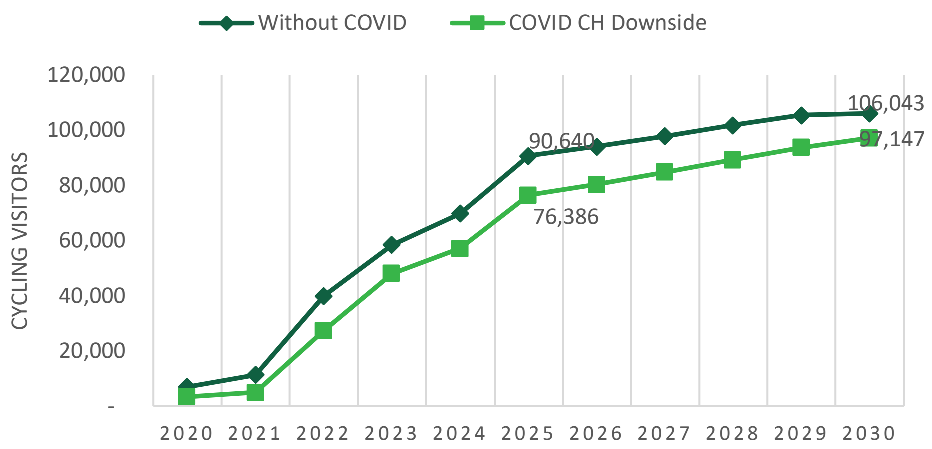
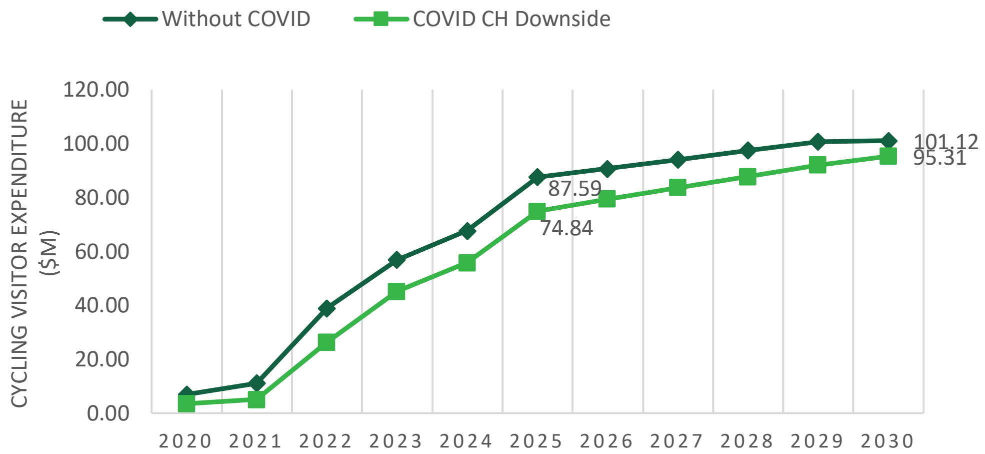


Figure 8. Estimated MTB visitor expenditure using the 2% assumption in different scenarios[35]

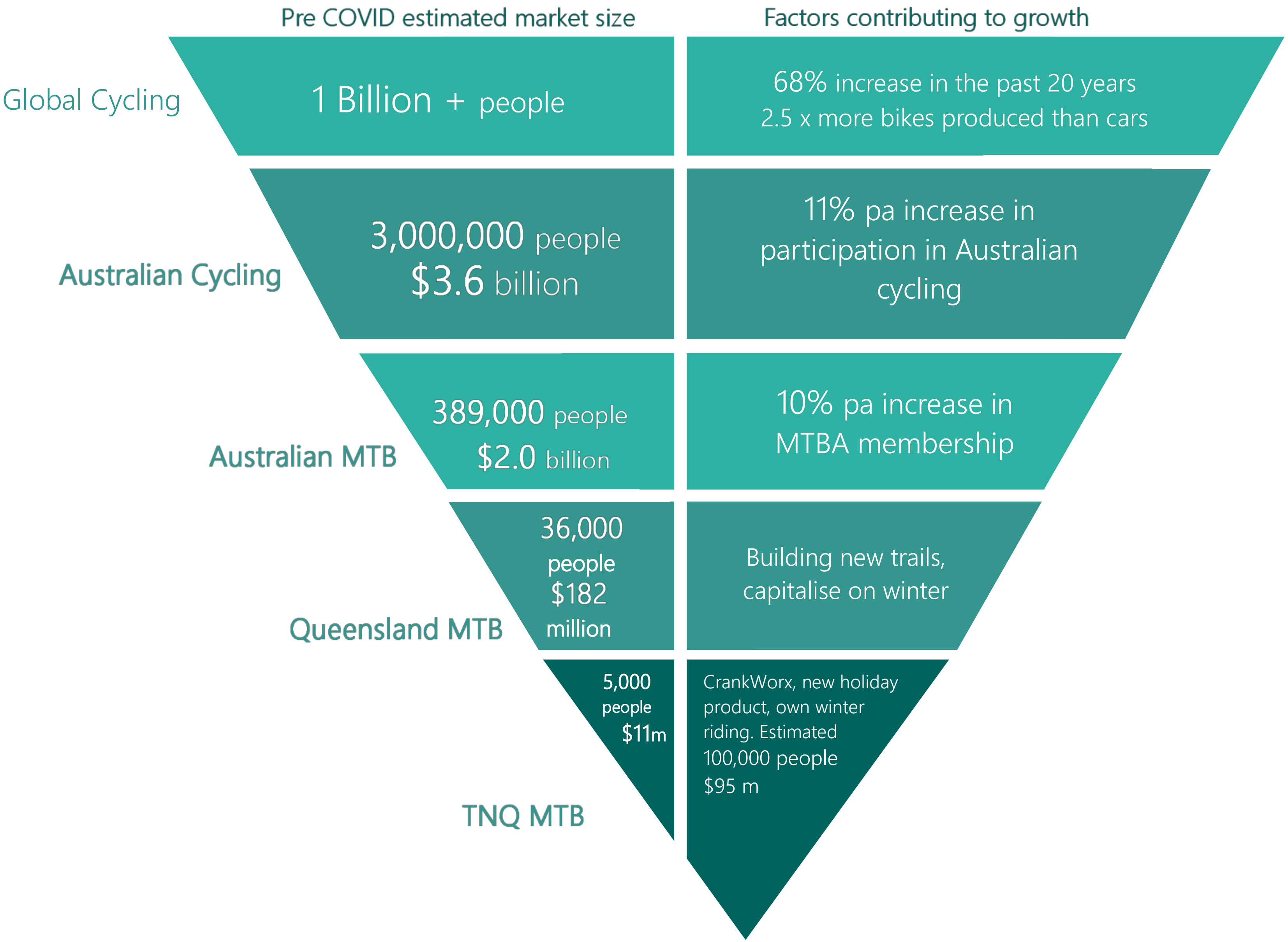


The estimations above are effectively a 'best guess' based on the assumptions listed. If the MTB product does develop and the Deloitte forecasts are accurate, it is estimated that by 2025, there will be around 76,000 visitors engaging in MTB in the TNQ region, spending around $74m annually. By 2030, it is expected that this will grow to around 97,000 visitors spending around $95m annually. This could be much more or much less, depending on the level and type of investment in MTB product, the duration of the COVID era and the accuracy of Deloitte's forecasting.

[34] Data and Assumptions: Deloitte Access Economics (2021), Tourism Tasmania (2020)

[35] Data and Assumptions: Deloitte Access Economics (2021), Tourism Tasmania (2020)

Figure 9. Potential to grow MTB Market size in Australia, Queensland and TNQ - 2030[36]



[36] Statistics compiled and derived from key data sources, including Pioneer Sport (2019)

2.3 Market Characteristics

2.3.1 Male dominated

Mountain biking is absolutely a male dominated pastime. In Australia and NZ, the split in participation is around 80% male to 20% female.[37] In Europe, a survey conducted in 2015 by the International Mountain Biking Association showed a 94% male to 6% female split, and a number of other studies globally have identified a 90%/10% split.[38]

The significant opportunity to engage female riders is under-researched, but indications suggest that the male-dominated social worlds of mountain biking shops, hire places and fellow trail users may be a barrier to participation.[39] Initiatives such as the TNQ Women's Mountain Bike Group, which has more than 300 Facebook followers and more than 100 riders,[40] provide opportunities to engage with this significantly latent market for growth within Australia. As a highly networked market, a local base of female riders could be harnessed to promote female engagement through below-the-line marketing initiatives. A Women's Enduro Series was run through Cairns MTB Club in 2018.[41]

2.3.2 Aged 30-60, well educated and higher than average earnings

Studies across nations indicate that MTBers are generally aged between 30-60, are well educated and earn more than the national average.[42] In Europe, around 38% of MTBers have an academic degree. Figure 10 below shows the distribution of participation in MTB by age and gender.

Figure 10. MTB participation by age in Australia[43]

[37] AusPlay (2020)
[38] Buning and Gibson (2016)
[39] Buning et al. (2019)
[40] Australian Mountain Bike Magazine (2019)
[41] Cairns MTB Club (2020)
[42] AusCycling (2021), AusPlay (2021), Buning et al. (2019), IMBA (2018)
[43] AusPlay (2021)

2.3.3 People who travel to MTB

The global size of the Destination MTB market size is not known, however in Europe, an estimated 50% of mountain bikers keeps in mind whether the destination is interesting for mountain biking, and 40% take their bikes on holiday with them.[44]

In Australia, Tourism Tasmania have published the results of research they conducted into the Australian MTB ‘passion first’ market. They found that there are around 300,000 travelling Australians who take holidays for MTB travel – about 2% of the travelling population. Contrary to broader participation statistics, they also found that 50% of the market are aged under 34 years and are typically part of a couple with no kids or a family with children, although this is not how they usually travel for MTB purposes. As per the participation rates, they are significantly more likely to be male (75% to 25% female), and are mostly based in New South Wales, followed by Victoria and Queensland.

In the US, the Destination MTB market are characterized by frequent, short breaks; considerable age-based heterogeneity, being middle aged and male, with above average income akin to findings of previous studies of mountain bikers. Regarding income, 84.2% earn more than US$50,000 in annual household income, representing predominately above-average income levels. They take an average of five short break trips annually of about 400 miles per trip during the spring and summer months, and in the process spend around US$400 per trip.[45]

[44] International Mountain Bike Association (2015)

[45] Buning et al. (2019)

2.4 Preferences

In the COVID era, the preferences and opportunities for markets to travel will continue to change for some time. This section considers some of the preferences of MTBers in Australia who may not yet be Destination MTBers but may be interested in participating in MTB whilst on holiday.

2.4.1 A range of track styles and difficulties is important

Research has shown that particularly in Holiday first markets, a diversity of trails is valuable. In particular, trail loops with side-trail options for higher degrees of difficulty that enable a range of riding abilities is important to people travelling in groups so they can ride together.[46]

2.4.2 Comfort is important

Whilst there is no available data showing this, considering the relative comfort of participants in MTB especially during the hotter and wetter months of the year in TNQ should inform the development of the experiences. Bali, which has a similar climate and thriving Holiday and Destination MTB markets, has been profiled in the competitive analysis below. The experiences in Bali have thrived partially because of the long downhill stretches for MTB participants down the slopes of Mt Batur. “Flowy, fast and smooth” tracks that are mostly downhill, with uplift, options for degrees of difficulty, cultural experiences, guides and opportunities to rest and have a cool drink seem to be the recipe for success in Bali.

It is also important to acknowledge that some trails may not be rideable throughout the wet season in the tropics. Riding on wet trails can degrade trails and it will be important to work in consultation with track managers and maintenance crews to ensure that sufficient riding products will be available (if not desirable) year-round.

[46] Buning and Gibson (2016)

2.4.3 Related activities

In Europe, the International Mountain Biking Association (IMBA) identified that the top five reasons to ride are:

1. To enjoy nature
2. To escape everyday life
3. For excitement
4. To improve skills
5. Socialising, having fun[47]

Corresponding with the primary reason of enjoying nature, across the major source markets, outdoor pursuits and activities go hand in hand with MTB. By far the most popular activity complementing MTB is bushwalking or hiking. Others identified in studies include camping, kayaking, fishing, skiing, football, running, gym/fitness, swimming, bushwalking and cycling.[48]

2.4.4 The shop is important

As with skiing, the MTB shop is a focal point for local advice, communication about track conditions and closures, direction to information sources, acquisition of gear, repairs and professional assistance. The role of the shop in the overall MTB product cannot be underestimated in the delivery of MTB experiences.

[47] IMBA (2015)
[48] AusPlay (2020), Buning et al. (2019), Moularde & Weaver (2016)

2.4.5 A connected network of infrastructure is critical

For beginners through to seasoned professionals, it is important that people can travel easily between the key locations of:

- Airport
- Accommodation
- Shop/hub
- Trail head
- Ancillary services (toilets, cafes, airport services, bike friendly city, taxis with racks, etc.)

2.4.6 MTB is predominantly not a winter pastime

Research in the US has shown that there is an overwhelming preference for mountain bikers to take MTB-specific trips in summer months (34.3%) closely followed by autumn (33.3%) and spring (30.7%). Only a negligible proportion of respondents preferred mountain bike trips during winter (1.8%)[49]. This presents a prime opportunity for Cairns to capitalise on riders from southern states and New Zealand seeking holidays with riding experiences during the winter months.

[49] Buning et al. (2019)

2.4.7 Travel preferences

As with the general MTB market, studies from the US suggest that the travelling MTB market's most preferred supplementary activities during mountain bike trips are hiking, followed by eating and drinking. The most preferred post-ride food and beverages included beer and burgers. Further evidence from Australia suggests that there are preferences for craft beer, particularly consumed at the point of brewing.[50]

Destination MTBers are repeat visitors who travel in groups, often with reasonably high-end bikes. Planning and booking periods can be well in advance, with some trips planned up to a year in advance. They will travel for extended weekends, often multiple times throughout the year. They typically travel to different destinations with the same groups of people. They take trips regularly, with 44% travelling at least once a month to an intrastate, interstate or international destination. Trips are either shorter (1-2 nights) or longer stays (3-10 nights). They generally travel in groups of five riding mates or more, with one person often responsible for booking and planning.[51]

They seek connection to the natural environment with an adrenaline outlet. They ride at any opportunity and have a love of the outdoors. Riders are dedicated and loyal consumers. Sense of humour and self-deprecation are important parts of communication by mountain bikers. Beyond the quality of the trails and riding experience, mountain biking enthusiasts are interested in nature-based experiences, as well as brewery and distillery experiences. Refuelling after a day on the trails with fresh produce and craft beer at a local pub or restaurant to debrief with fellow riders is common practice.

It is important to them to be able to find information about which trails are open, as well as the base level offering of the destination (eg. value for money, accessibility and options to suit different budgets). They are looking for an experience that gives a sense of achievement and makes them feel reinvigorated; a place where they can take time reconnect with themselves and rediscover what's important. This may be a place they return to time and time again.

The majority of destination mountain bikers are intermediate and advanced riders, who will largely be seeking access to this level of riding. However there are also opportunities to engage with families if a breadth of track skill offering is available. A diversity and length of bump tracks and easy tracks, potentially with trickier optional side tracks that are 'safe' to experiment on are particularly appealing to the families of riders who want to participate but who are not as skilled or practiced as their loved ones.

2.4.8 Quality of the trails is paramount

Research has shown across a number of studies that the quality of trails and riding opportunities are at the core of mountain bikers' destination preferences. For 'serious' riders, the destinations are evaluated as they seek to collect new experiences that align with their skill level.

[50] Buning (2020) & Tourism Tasmania (2019)

[51] Tourism Tasmania (2019)

2.4.9 Media habits

Mountain bikers largely dwell online and are frequent users of YouTube. They love influencer and point of view videos, high quality images and information pertaining to trail networks. Word of mouth and online advocacy is strong, especially from influencers who are top competitors. Social media and Google are also highly influential. Mountain bike publications, both print and online, are a key source of content, including Flow Mountain Bike, Revolution MTB, Australian Mountain Bike, Spoke (NZ) and Pink Bike (North America). These enthusiasts do not respond well to traditional advertising, such as TVC, print and digital advertising. Trailforks and Strava are trusted sources of information for riders.

2.4.10 Distance they travel is important

Further research shows that the further people travel to participate in MTB, the more time they spend on trails, the longer the visit and the more money they spend. This indicates that attracting people from further afield is more lucrative in terms of yield per visitor. Incomes, group size and durations of activity are integrally linked determinants of expenditure in cycling, with larger groups, higher income segments and longer rides yielding more for the destination.[52]

2.4.11 Events

Research conducted for Tourism NZ[53] suggests that events may activate people with limited leave to decide to travel. The only investigation of mountain bike racers' preferences to date found that the highest rated event preferences were organization, a challenging course, scenery, and an informative website.[54]

[52] (Downward, Lumsdon, & Weston, 2009)

[53] Kantar (2020)

[54] Getz and McConnell (2011)

2.5 Future trends

The two key trends to be aware of in MTB is that it is growing and electric bikes (e-bikes) are a growing segment of a growing market. COVID has boosted cycling, with a surge in demand creating world-wide shortages in bike supply. European industry groups report that Europeans are expected to buy an extra 10 million bikes per year by 2030, 47% more than the annual number in 2019. This will take bike sales to more than twice the number of passenger cars registered in the EU.[55]

In 2019, Deloitte released their technology predictions for 2020 foreseeing a surge in e-bike sales.[56] E-bike sales have also 'skyrocketed' during the lockdown period, with retailers in the US and Europe reporting 80%-140% increases in sales since lockdowns started[57]. E-bikes present a number of opportunities for MTB development in a destination like TNQ. In particular, they present the significant opportunity to expand the market to older or less fit participants who may not enjoy the exertion of uphill or longer rides,[58] or who may find the climate to warm to work too hard on any uphill climbs.

Whilst they do require charging stations, the system around this presents an opportunity to engage with e-cyclists within the destination. The air transportation organisation IATA has forbidden the transportation of e-Bike batteries on passenger planes,[59] so if people wish to travel with their e-bikes, they will need to purchase or hire e-bike batteries when they arrive. Given the unwieldy weight of them, it is likely that e-bike hire businesses will be well-patronised at destination.

From a travel perspective, a number of trends have emerged in the COVID era, which may or may not evolve over time as the pandemic conditions change. In Australia, research has shown that people are travelling more via car to their holiday destinations and are preferring regional experiences that are in nature. A key trend also to be mindful of is that many Australians were asked to use leave to tide businesses over during COVID shutdowns meaning that the overall leave balance in Australia available for holidays has declined. On the upside, the Trans-Tasman travel bubble has opened up the possibility for New Zealanders to substitute international travel outside the region with a trip to Australia. The flipside of this of course is that the market has also opened up for Australians to travel outside the country, delivering other potential competitors.

Recent Tourism New Zealand data also indicates that annual leave is an issue for Kiwis as well, although events may activate some people for a weekend trip.[60] The research also shows that New Zealanders are keen to explore places they have never been before and are particularly motivated by spectacular landscapes and scenery, accommodation options to suit their budget and opportunities to relax and refresh. This presents significant opportunity for TNQ to engage the NZ market.

[55] Forbes (2020)
[56] Deloitte Insights (2019)
[57] Electrek (2020)
[58] Buning et. Al (2019)
[59] Bike Exchange (2018)
[60] Kantar (2021)

3 The TNQ MTB Product

Since the UCI mountain bike World Cup returned to Cairns in 2014 after an 18 year gap, there has been renewed interest in the opportunities MTB could present for the region. The world class trails at Smithfield MTB Park and the linking trails between Smithfield and Port Douglas are the focus of events in the region, although there is an extensive network of trails on the Tablelands as well.

The announcement that Crankworx - an MTB event that claims to be the epicentre of culture and competition in mountain biking[61] - will be based in Cairns for the next 3 years, is breathing new life into the TNQ MTB product. With an expected 38 million viewers and reach of 100m people, with 12-15,000 people in attendance and is likely to generate further aspiration for the destination for both Destination and Holiday MTBers.

Other MTB events in the region include:

- The Reef to Reef 4 day MTB Stage race between Cairns and Port Douglas
- Triple R – Rural, Rainforest and Reef – Australia's first and oldest point to point MTB event. Coincides with the final stage of the Reef to Reef
- Crocodile Trophy – World's oldest MTB stage race – also Cairns to Port Douglas over 8 days
- Coastal 6 hour – 4 hours of daylight racing and 2 hours of night racing at Smithfield.
- Ona Mission Multisport Adventure – Mission Beach running, MTB, kayaking.

The development of MTB on the Tablelands presents significant opportunities for dispersal of visitors in the region, with an established network of trails, cooler climate and range of landscapes, all within driving distance of Cairns. In 2014, the Tablelands hosted the Crocodile Trophy - a UCI level annual mountain bike 10-day staged event held in Tropical North Queensland. The race typically covers around 1,200 kilometres and is known to be one of the most demanding mountain bike races in the world. The 2014 Crocodile Trophy race started in Cairns and travelled to Lake Tinaroo, Atherton, Irvinebank, Weatherby station and then finished in Port Douglas.

Seven of the nine stages of the event were held in the Atherton Tablelands region. There is no other event on the Atherton Tablelands that has the audience reach that the Crocodile Trophy has both nationally and internationally, with over 7 million overseas viewers watching the TV coverage and a number of follow-on blogs and social media coverage and sharing.

Whilst these events display the MTB credentials of the TNQ region, and the TNQ region has significant attractions independent of MTB, the MTB tourism industry is in its infancy. Currently dependent on a handful of MTB shops that service the local MTB market, there is effectively no active product in the region providing a commissionable MTB product for the tourism industry. A Google search of "mountain bike Cairns" displays the TTNQ and TEQ sites, the Cairns MTB Club and Cairns Mountain Bike Tours – which is not currently operating due to COVID.[62] Dan's MTB Fully guided tours of the region comes up after multiple searches online.[63].

[61] Australian Mountain Biking Magazine (2021)

[62] Cairns Mounatin Bike Tours (2021)

[63] https://www.dansmountainbiking.com.au/

3.1 Smithfield MTB Trails

Because of its World Championship course, the jewel in the crown of the TNQ MTB offering is currently Smithfield MTB park. With a total distance of 28km of trails, this is a relatively small MTB park, with a 27km network, shown in Figure 11.

As a rule of thumb, TRC recommends that a trail network needs to be at least 70km for people to travel to it, with a diverse range of trail types and difficulties. An evaluation of the trail network in TNQ in Table 7 below details the rating, number of rides recorded and kilometres of trails by difficulty rating. This shows that the Port Douglas trails offer the only viable opportunity in terms of length, but not in terms of the World Championship credentials Smithfield has, or variety of trails, with only 5km of difficult trails out of the 94km network.

Figure 11. Smithfield MTB Trail network[64]

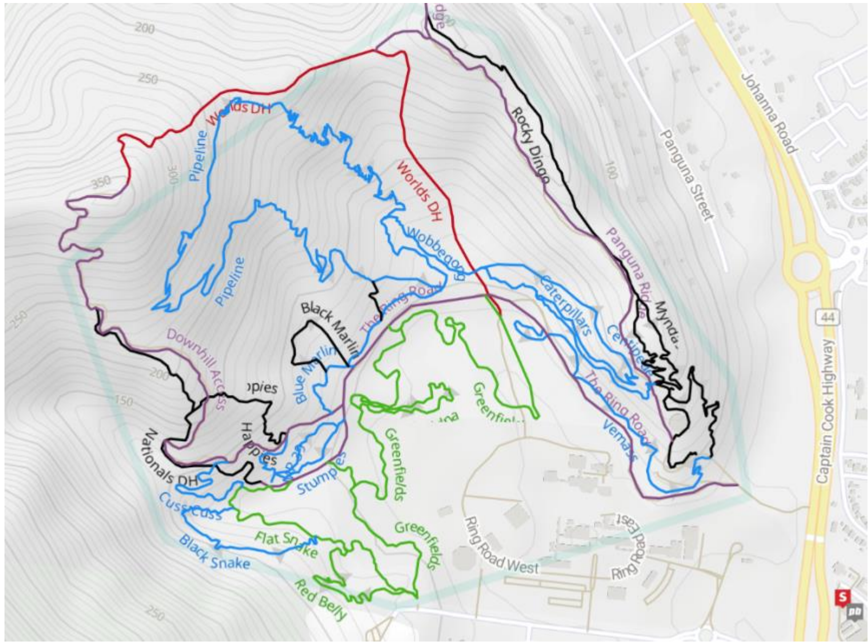


Table 7. Overview of MTB trails most used in the TNQ Region[65]

			KM OF TRAILS BY DIFFICULTY				
	Rating	No. of rides counted	Access	Easy	Int	Difficult	km total
Port Douglas Trails	4.5	321	12	24	53	5	**94**
Davies Creek	4	687	0	17	5	0	**22**
Atherton Forest MTB Park	4	2571	0	14.7	22.6	0	**37**
Smithfield	4.5	9,639	6.2	4.8	8.9	6.9	**27**

[64] TrailForks (2021)

[65] TrailForks (2021)

There is some seasonality in the riding in TNQ, with June – August being particularly popular, a reasonable shoulder period and less activity from December – March. It is important to bear in mind that many of these rides are likely to be locals. A similar trend is evident in Atherton (Figure 13), although the data is much less reliable as there are fewer rides logged there.

Figure 12. Trail Check-Ins per month in Smithfield[66]

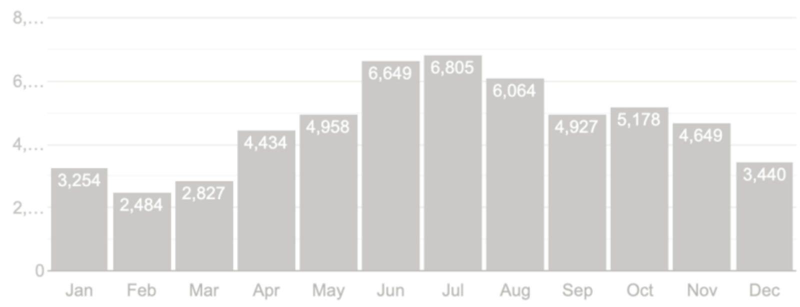


Figure 13. Trail Check-Ins per month in Atherton[67]

Table 8 reveals the relative infancy of the TNQ tracks compared with key MTB competitors such as Blue Derby, Rotorua and Mt Buller, which is home to the Southern Hemisphere's first and only IMBA Epic Trail, the Australian Alpine Epic.

Table 8. Rides counted and total trail length TNQ - Competitors[68]

	Rating	No. of rides counted	km total
Port Douglas Trails	4.5	321	**94**
Davies Creek	4	687	**22**
Atherton Forest MTB Park	4	2571	**37**
Smithfield	4.5	9,639	**27**
Rotorua	3.5	180,300	**410**
Blue Derby	4	34,168	**108**
Mt Buller (Alpine Epic)	3.5	10,906	**149**
St Helens	4.5	4,889	**159**

[66] TrailForks (2021)

[67] TrailForks (2021)

[68] TrailForks (2021)

A mix in the types of trails available is also critical for the successful development of MTB in the region. The 2015 TNQ Regional Mountain Bike Strategy[69] indicated that Gravity Endure and 'flow trails' tap into the heart of what makes MTB fun and will remain key attractions in mountain biking. This is still the case, and is at the heart of the success of competitors such as Blue Derby, Rotorua and Bali. It also found that Cross Country (XC) still remains the discipline with which the majority of mountain bikers identify and is the discipline in which most people enter the sport. Bike Parks in urban areas where young riders can access them were also identified as essential to growing the sport in the region, and also provide options for travelling families to engage in TNQ MTB at all ages.

The report made a number of findings and recommendations that remain relevant to developing the MTB experience in 2021, including:

- Continue to maintain and develop world-class trails to facilitate world-class events
- Document existing trails with a consistent format for maps, directions, trail descriptions, etc
- Investigate IMBA accreditation requirements and audit the existing trails to understand what is required for accreditation
- Support the development of an additional descending trail at Atherton, to the length and standards needed to achieve Gold ride centre status
- Investigate the adoption of the IMBA trail building principles to establish a consistent product across the region – including signage, track quality and trail difficulty rating system that:
  - Provides opportunities for use by less experienced riders
  - Creates safe and convenient drop off and pick up areas and trail head amenities
- Provide clear, region-wide priorities for the development of a coordinated network of trails and experiences across the region to avoid inefficiencies, inconsistencies and unnecessary expense, and maximising economic and social benefits to the region. The top priorities were to:
  - Map the existing trails consistently across the region
  - Confirm any gaps in trail infrastructure
  - Confirm the priority trails and likely issues such as tenure & funding
  - Confirm priority trail infrastructure
- Develop a social media and technology plan that strategically considers the trends and change in use of social media, apps, go pros and drones
- Commission region-specific research into the value of MTB in the TNQ economy – primary research of trail users and markets
- Build the TNQ MTB brand with unique and interesting trail names reflecting the place and people, iconic viewpoints where the feats of individuals can be filmed to promote viral sharing opportunities, uniform and clear signage
- Deal with risk through building a regional trail alert system that is live and accessible from a range of social media sources, and promoting consistent messaging about liability and insurance
- Work with local clubs, councils and land managers to build the MTB brand and product authentically.

These recommendations should be taken into account in considering the further development of MTB as an experience in TNQ. These recommendations were aimed at evolving TNQ MTB to a must-travel destination for Destination MTB travellers. The experiences of other destinations suggest that this development has the 'halo effect' of increasing Holiday MTB as well – with solid infrastructure, brand and supporting services. There exists significant opportunity to develop the TNQ MTB product to further engage with the current and potential markets. The competitor profile below considers three successful MTB destinations that could provide insight into the experiences MTB markets are seeking.

[69] FNQROC (2015)

3.2 Competitor profile

3.2.1 Bali: Holiday MTB competitor

Bali is not a traditional MTB destination, however it is a key competitor for the Cairns holiday market when international borders are open. With competitive pricing, tropical weather, shopping, a wide range of accommodation options, direct flights and family holiday activities such as Waterbom waterslide park, Bali offers a cost-effective international alternative for Australians seeking a tropical holiday. Bali has also harnessed recreational MTB opportunities with a wide range of MTB tours available. These are usually delivered as a full- or half-day experience pitched at a wide range of abilities. Viator currently returns 252 results for 'Top Bali Mountain Bike Tours'.

These tours are most often packaged with uplifts, stops along the way at local arts, crafts, producers and eateries, guides and sightseeing opportunities. Rides are often not just about riding, but about experiencing the natural and cultural landscapes of the island, paddy fields, bamboo forests, traditional villages, agricultural producers, volcanic tundras and coastlines.

Volcanic riding experiences in Bali

Source: Enduro Mountain Bike Magazine

Diverse landscapes and guided tours

Source: Indonesia-Tourism.com

Technical riding parks

Source: Bali Mountain Biking – Bali Bike Park & Biking Trails

Infinity Mountain Biking in Bali[70] packages a wide range of Bali MTB experiences that cater to both the Destination MTB and Holiday MTB markets.

[70] https://www.infinitymountainbiking.com/day-rides/bali/the-volcano-trail.html

Batur Crater to Ubud - Advanced

An early transfer will bring us to Mount Batur, our playground for the morning. We will ride around on the rim of the caldera of the volcano on a wide mixture of terrain with amazing views of Mount Batur, Lake Batur and Mount Abang. You may expect some of Bali's best views of the ocean on one side and the volcanoes on the other! Please be aware of the tall grass and the tight single track through the woods. After a steep decent on a broken up tarmac road we end up inside the caldera where we ride towards the lake. We will end up mountain biking through the lava stream where the latest eruption happened, a truly amazing experience. This is where the first 25km of the ride finishes.

Mount Batur to Ubud – Soft Adventure

This bike ride is suitable for people of all ages who would like to experience all the highlights that Bali has to offer in one single day. Our guide and driver will pick you up at your hotel and drive you up to Mount Batur where you can enjoy spectacular views overlooking the volcano. Expect one of Bali's most amazing views.

We will cycle all along quiet back roads through local villages, rice paddy fields and amazing country side terrain for approximately 4 hours. Throughout the tour there will be many opportunities to stop and take photographs and interact with the friendly local people. We will also stop at one of the many village temples. Along the way you will get to try traditional local snacks and different fruits. Throughout the ride our support vehicle is never far off with cold drinks and anything else you might need. The ride ends in Ubud from where we will transfer you back to your accommodation in Ubud or in the South of Bali.

3.2.2 Tasmania: Destination MTB competitor

Tasmania is a key competitor for TNQ in the Destination MTB space. The comparatively high cost of travel is offset by the globally recognised tracks at Derby and Maydena.

Derby's high quality 'brown powder' dirt has been likened to the quality snow powder of ski fields in Japan by a number of experts and operators. It enables safe and enjoyable riding experiences that are unrivalled in Australia. In 2019, Derby won the Enduro World Series' rider's choice awards for their favourite trail of that season globally. The combination of dirt and trail quality with the quality of the environmental setting at Derby has been cited as the 'holy trinity' for its MTB experience. Added to this is the pioneering historical context, expanding network to St Helens and ancillary products such as Blue Derby Pods Ride,[71] uplift, retail, hire, range of accommodation and eateries.

Derby has a mix of trails catering for all skill levels and riding styles, the pristine natural environment enhances the trail experience and sets a benchmark for other destinations to aspire too, attracting approximately 30,000 visitors per year. The town of Derby has seen new businesses open; accommodation beds increase (from 12 rooms to more than 70 rooms) and a wave of residential and commercial real estate acquisitions. Dorset Council General Manager, Tim Watson, estimates the economic impact of mountain biking on the region is between $15 and $18 million dollars.

Maydena provides a complementary experience within Tasmania about three hours' drive from Derby. Its 820m+ elevation is its key selling point,[72] with trails the highest in Australia and claiming to be twice as high and twice as long as those in Queenstown, NZ. Marketing themselves as a viable option for Northern Hemisphere riders, they sit immediately adjacent to the Tasmanian Wilderness World Heritage Area and well known attractions such as Russell Falls, Valley of the Giants and Lake Pedder. With regular uplift services, bar and cafes and around an hours' travel from Hobart, Maydena is a key competitor for TNQ in its own right.

Photo credit: FLOW Nation

[71] https://bluederbypodsride.com.au/

[72] https://www.maydenabikepark.com/about/

Blue Derby Pods Ride is a luxury product in the Derby offering.

The Adventure

Over your Experience with us, you will coast through the stunning, world-class Blue Derby Mountain Bike Trails network. Your experience leaders will guide you safely, to the places less ridden, opening up your senses to the brutal beauty of North East Tasmania.

The Accommodation

Nestled in the heart of the Blue Derby Mountain Bike Trails network, your accommodation is private and unique. You'll dine in a central hub building that peeks through the copse of Tasmanian Blackwood trees and down to the Cascade River Valley below. After each evening of fine Tasmanian food and wine, laughter and relaxation, you will retire to your unique, architecturally-designed quarters: a Pod.

The Food

Throughout your Blue Derby Pods Ride experience, your taste buds will be treated to a selection of the finest fare Tasmania has to offer. Crafted locally, and featuring almost exclusively local Tasmanian produce, your food experience will be nutritious, refuelling and mouth-watering.

Luxury accommodation

Source: Blue Derby Pods Ride

'Ride out' pods accommodation.

Source: Blue Derby Pods Ride

World class trails

Source: Blue Derby Pods Ride

3.2.3 Rotorua: Destination and Holiday MTB competitor

Rotorua is not a direct holiday competitor for TNQ but contributes to the broader NZ product that is increasingly part of the competitive set for Australians as the Trans-Tasman travel bubble establishes. With more than 65 km of purpose built MTB trails linked to a network of forest roads (downhill, cross country, single track), support amenities (toilets, parking, picnic facilities) and a full range of services including MTB hire, bike shops, tours and skill clinics, cafes, dining, range of accommodation, Rotorua attracts both the Destination and Holiday MTB markets.

As with TNQ, Rotorua has a long established MTB club. In 2019, the International Mountain Biking Association (IMBA) named Rotorua's Whakarewarewa Forest trail network among the six best in the world. They hold Crankworx annually; with each Crankworx event estimated to contribute more than $8 million to the area. A 2018 economic impact study estimated that people who ride in Rotorua's Whakarewarewa forest contribute between $30m to $50m in spending annually to the local economy. This equates to between 2.5% and 5% of total spending in the district by visitors and about three quarters of that visitor spend is by those who travel to Rotorua specifically to ride in Whakarewarewa Forest. This spend contributes an estimated 200 to 350 FTE jobs which equates to between $10m and $20m in income.[73]

The supporting tourism infrastructure in Rotorua presents many opportunities for development. Similar to TNQ, the region has long been an international tourism destination in its own right and provides a diversity and depth of experience for visitors. The maturity of the tourism industry in the region has allowed for services to the MTB experience to be developed – such as the gondola uplift, accommodation and attractions. Unlike TNQ, Rotorua has the benefit of proximity to two large cities, with Auckland and Wellington both driving distance away, so is able to sustain an ongoing local market. This presents an opportunity for TTNQ however; these New Zealanders who enjoy riding are a prime Holiday and Destination MTB target market for the region.

> "Rotorua's trails are the stuff dreams are made of: perfect dirt, with amazing flow, weaving through towering Redwoods. They're mesmerising, fast, fun and practically endless."
>
> Flow Mountain Bike
> Australasia's Leading Mountain Biking Information Provider

World class trails
Source: New Zealand.com

Using existing tourism infrastructure
Source: New Zealand.com

Whakarewarewa forest
Source: New Zealand.com

[73] Stuff.co.nz (2019), Scoop.co.nz (2019)

4 Conclusion

This market analysis of the MTB market in Cairns has identified areas to consider for development, gaps in the TNQ MTB product and gaps in knowledge about the MTB market. It has identified that the MTB market is a sympathetic and potentially symbiotic market for TNQ to pursue, due to the outdoor nature of the activity, the remarkable diversity and beauty in the landscape, and the particular opportunity presented for winter riding when the climate is best in TNQ and worst in southern source markets.

Although TNQ commands a World Championship trail network in Smithfield, and a number of other trail networks, the depth and breadth of the product is not currently at a level to draw the types of experiences the broader leisure MTB market might be seeking. Both the Destination and Holiday MTB markets are seeking a diversity of high quality Gravity Enduro and Cross Country trails that are connected to long, flowy downhill networks with side trails for higher levels of difficulty in a high quality environment, with at least one decent bike park. They are seeking a consistency in branding, uniqueness and connection with place, opportunities to socialise and to consume locally produced food and beverages in a down-to-earth, connected environment. They are unlikely to be travelling alone, seeking opportunities to connect with one another in rest areas and places to enjoy a cool drink and a good view. It is critically important to them that they can easily access a shop/hire facility to provide them with local advice, direction to high quality and consistent information sources, servicing for their bikes, hire of equipment including e-bike batteries. Connectivity between the airport, accommodation, services, hire, shops, uplift and trial heads is critical. Trustworthy and reliable uplift operators are particularly important and usually connected to the shop or hire facility.

Although Destination MTBers are seeking new and invigorating trail networks and usually travel with friends, they still value a diversity of trail options, as not everyone enjoys the black diamond difficulty options. Holiday MTBers definitely err on the side of easy flow trails with organised tours, uplift and other experiences, as evidenced by the success of Bali.

TNQ currently has very little MTB product to support the expectations of either key segment. The 2015 TNQ MTB Strategy has already recommended an audit of trails to evaluate the gaps in offering and opportunities to connect the current infrastructure to a broader network, in particular an iconic trail that connects Smithfield with Port Douglas. The Smithfield trail network is best evolved to continue to host key events such as Crankworx and the World Championships as an aspiration venue for Destination MTBers. Holiday MTBers would enjoy a long, flowy trail that is mostly downhill with uplift to the trail head, with iconic views and opportunities for commercial engagement (such as cold drinks, tropical fruit ice cream, coconuts with banana and local honey, a swim and a brewery stop at the end). This trail would also support key MTB events in the region. The existing 94 km of Port Douglas easy and intermediate trails may be a starting point for development like this.

It is difficult to estimate a proportion of Destination MTB to Holiday MTB travellers in TNQ at the moment, as there is little data available on Cycling or MTB activity. Above the recommendations from the 2015 report, this analysis indicates that there is a need to better research the volume, preferences and behaviours of visitors who MTB in the TNQ region. One possible way to do this as the product evolves would be to build an 'MTBCairns' mobile phone application that intersects with Trailforks to provide real-time trail data, conditions, closures, etc on trails, with useful information on connecting services, uplift timetables, local eateries, toilet locations, swimming spots, etc. that also tracks visitors to provide data on visitor movement and behaviour.

Supporting the development of MTB infrastructure and services as well as commissionable product is critical to the evolution of the TNQ MTB experience. Further to the recommendations from 2015, an audit of trails, product, brand and infrastructure is needed to strategically develop the Cairns MTB product and capitalise on the upcoming events. Attracting investment for appropriately targeted trail building should be the first priority, with a view to the supporting services required. Bali has shown that with the right suite of products and supporting infrastructure, it is possible to activate a significant number of travellers to engage in MTB activities who may not have otherwise engaged whilst on holiday. This aligns with the Leisure market identified by AusCycling as having significant potential.

The MTB markets will not grow without product aligned to their needs. If this can be done, the best opportunity for growth is in a two-tiered approach of Destination and Holiday MTBers. Destination MTBers can be relatively cheaply reached through influencer visits, AMB and Flow Magazines, YouTube and international online platforms such as PinkBike. Holiday MTBers are looking at Cairns anyway. Expanding to incorporate MTB content through your existing channels, particularly online and social content featuring family and couple riding experiences will reach these markets as well as some featured influencer videos. Geographically, New Zealand, New South Wales, Victoria and Queensland present the best market growth opportunities in the short term if the product can be developed to meet their expectations. In the longer term, Europe and North America are an opportunity to cultivate. Given TNQ attracts such a high percentage of domestic visitors, a focus on building and sustaining the domestic markets is likely to yield the best results in terms of marketing ROI.

5 Recommendations

Drawing from the analysis and conclusions, this report makes the following recommendations:

1. **Gather and build data.**

   Establish a new mechanism to measure visitor MTB activity in TNQ to establish a baseline and a metric for measuring the effectiveness of marketing and product development. This would be of benefit to the entire industry in TNQ. As the CQU airport survey is no longer operating, an alternative should be found to effectively monitor activity in the region. Tourism Research Australia could be asked to include an MTB question in the International and National Visitor Surveys. Alternatively, triangulating mobile phone and credit card data with TRA data is also becoming an option for regions, or an application with tracking capability (see recommendation 6) could be considered.

2. **Market for the southern winter**

   Winter is not a favoured time for MTB riders in the cooler climates. This provides an excellent opportunity for TNQ to offer the 'year-round' experience as the southern winter coincides with the best times to ride in the region. Whilst the wet season is neither enjoyable nor advisable for riding, the shoulder seasons from May-November are still popular riding months and provide excellent opportunity to raise awareness in the Destination MTB market.

3. **Advocate for more product that meets the Holiday market's needs**

   Bali has experienced exponential growth in the MTB offering through providing a Holiday- and Family-friendly style of product combined with higher level MTB offerings. If crafted well, TNQ could provide a compelling and exciting product ecosystem that has the potential to expand both the market and the average length of stay. Engaging with existing products such as new breweries and distilleries in the region would be particularly attractive to the market.

4. **Focus on NSW, Victoria and NZ Destination MTBers**

   The range of riding locations in these places and size of population ensure an engaged local riding fraternity, many of whom are seeking new and different places to travel to in groups. They are seeking places that make having a bike easy – a connected network that enables bikes to be safely stored and moved, as well as satisfying riders' needs to connect with one another, sample local food and share stories about their rides. This market needs to be treated with caution however; a sufficient complement of riding options needs to be available to ensure positive word of mouth – they are a connected group.

5. **Work to build a high capacity MTB operator network**

   Critical to the experience of MTB riders is the shop, uplift or hire station. Working with these operators in the Region to offer on-ground support to visitors, customise product for the market's needs and build effective marketing strategies is a straightforward way of accessing the market, supporting local business and providing a better experience for visitors.

6. **Provide connected and real-time information**

   Trailforks enables trail managers to make reports on maintenance and trail condition. Working to incorporate Trailforks trail reports and information on track closures, degrees of difficulty, etc. as a real-time input into information for visitors will improve the TNQ riding experience. Consider the development of a Cairns MTB application that intersects with Trailforks and value adds with local information such as local breweries and eateries, ride shops, tours, charging stations, toilets and hire facilities. Facilitating organic information sharing across users is critical to the success of anything like this.

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WELCOME
SMITHFIELD
MOUNTAIN BIKE PARK
RIGHT PLACE
EASY
INTERMEDIATE
DIFFICULT
ADVANCED
SMITHFIELD
MOUNTAIN BIKE PARK
SANTA CRUZ
MAXXIS

7 Appendix

1. Tourism Tropical North Queensland 4 Brand Pillars

BRAND PILLAR 1	BRAND PILLAR 2	BRAND PILLAR 3	BRAND PILLAR 4
Explore iconic landscapes	**Discover unique nature & wildlife**	**Experience everyday luxury**	**Choose your own adventure**
Find "pinch me" moments as you Explore Iconic Landscapes in Cairns & Great Barrier Reef. Marvel over the natural beauty as you wander through a 180-million year old rainforest, or experience the breathtakingly beautiful tapestry of sunken coral gardens of the greatest reef on earth. Walk on country with Aboriginal guides as they interpret the stories of their ancestors through irreplaceable rock art sites, or show you how their people have interacted with the land and sea for thousands of years. Discover landscapes carved by volcanoes or outback caves formed on an ancient inland reef with expert guides. These are the places that take your breath away and leave you in awe. They're the moments that make you say "I am here, and there is nowhere else I'd rather be".	With the oldest rainforest and the largest living ecosystem on earth side-by-side, it should be no surprise Cairns & Great Barrier Reef hosts many plant and animal species found nowhere else on the planet. In fact, these two environments are some of the most biodiverse habitats on the planet. Swim with the only known aggregation of the Dwarf Minke Whales; encounter a rainforest icon, the Southern Cassowary, as it meanders through the undergrowth in search of fruit; discover not all kangaroos are ground dwelling, with Australia's only two species of Tree Kangaroo; or watch the reef come alive with a synchronised coral spawning each year. Conservation is at the heart of all endeavours. Contribute to reef restoration by being an Eye on the Reef and conserve the reef simply by visiting through a direct contribution to Great Barrier Reed Marine Parks Authority.	Experience Everyday Luxury is the Cairns & Great Barrier Reef way of saying "choose your own level of luxury". With everything from 5 star resorts with all the trimmings, to sleeping under the stars with back-to-basics camping — all options leave you greater in their own unique way. An everyday luxury could be as simple as escaping the crowds and having a pristine beach all to yourself, right through to a private picnic on a sand cay on the Great Barrier Reef. Let friendly faces serve you locally caught seafood from the back of a trawler; sink your teeth into juicy mangoes picked straight from the tree; gather bush tucker and go hunting with Indigenous guides; or have renowned chefs prepare you mouthwatering meals using local and seasonal produce.	Choose Your Own Adventure isn't always about getting the adrenaline racing, it's about seeing the world from a new perspective. Drift lazily under the rainforest canopy on an inflatable raft; undertake an epic journey through Australia's most iconic 4WD locations; dive into the depths of the Great Barrier Reef with a Master Reef Guide; or enjoy the sense of achievement of climbing Queensland's highest mountain. The journey is as important as the destination and you'll leave feeling accomplished as you undertake new experiences in new breathtaking locations.

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