

WHAT MAKES MOUNTAIN BIKING ENTHUSIASTS UNORDINARY



Blue Derby Mountain Bike Trails
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——— Tourism Tasmania’s Unordinary Adventures program is a Tasmanian Government initiative aimed at dispersing visitors to Tasmania’s regions. The program targets visitors who travel for their passions, and focuses on four special interest areas: mountain biking, golfing, fly fishing and walking. This audience profile is a summary of Tourism Tasmania’s research into mountain biking enthusiasts.

Mountain biking enthusiasts in Australia

The research conducted by KANTAR¹ into mountain biking enthusiasts across Australia, who are potential mountain biking visitors to Tasmania, revealed the following insights:

MARKET SIZE	Mountain biking enthusiasts represent approximately 2% of travelling Australians who take holidays for their special interest area.
HOLIDAY HABITS	Mountain bikers 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.
PSYCHE	Mountain biking evokes a sense of freedom, energy and adventure in riders. It’s an invigorating experience, enhanced by being out in nature.

GENDER	75% male. 25% female.
AGE	50% are aged 34 and under.
LIFE STAGE	Typically family with children/dependent adults, or single/couple with no kids.
LOCATION	Across Australia, the majority of enthusiasts are based in New South Wales, followed by Victoria and Queensland.
WHAT THEY SEEK AND WHY THEY TRAVEL	Easy to find information about which trails are open is important, as well as the base level offering of the destination (eg. value for money, accessibility and options to suit different budgets). Mountain biking enthusiasts are also 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.
LEVEL OF EXPERIENCE	The majority are intermediate and advanced riders, who will largely be seeking access to this level of riding.
SPEAKING TO ENTHUSIASTS	Mountain biking specific platforms, such as magazines and apps like Trailforks and Strava, are trusted sources of information for riders. Word of mouth recommendations, social media and Google are also highly influential.
BARRIERS TO TRAVEL	Access to Tasmania is a barrier to travel for some of these enthusiasts. This includes the transport of bikes or packaging of bikes for a flight.



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Mountain biking enthusiasts visiting Tasmania

Tourism Tasmania’s Mountain Biking Situational Analysis² was developed from interviews with key industry stakeholders. This revealed the following insights about mountain biking enthusiasts that have visited Tasmania:

HOLIDAY HABITS	Mountain biking enthusiasts 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. It’s common that one person will be elected to transport bikes on the Spirit of Tasmania, whilst the others fly and meet them either in Launceston or Hobart.
PSYCHE	Mountain bikers 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.
INTERESTS OFF THE TRAILS	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 is also popular.
SPEAKING TO ENTHUSIASTS	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. Mountain bike publications, both print and online, are a key source of content, including <i>Flow Mountain Bike</i> , <i>Revolution MTB</i> , <i>Australian Mountain Bike</i> , <i>Spoke (NZ)</i> and <i>Pink Bike (North America)</i> . These enthusiasts do not respond well to traditional advertising, such as TVC, print and digital advertising.
OPPORTUNITY MARKETS	Females and families have both been identified as key opportunity markets by the mountain biking industry.

There are two distinct sub segments within mountain biking enthusiasts visiting Tasmania.

1. PROFESSIONALS

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

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.

Mountain biking visitors to Tasmania – What the TVS Reveals

Top-line statistics for mountain biking visitors to Tasmania, sourced from Tourism Tasmania’s Tasmanian Visitor Survey (TVS)³ for the year ending March 2020, indicate:

- 27,700 interstate and international visitors reported participating in mountain biking during their stay in Tasmania;
- Visitors participating in mountain biking has seen an average annual growth of 11% over the past 5 years;
- These mountain biking visitors stayed on average 12.5 nights in Tasmania; longer than the average visitor to Tasmania (8.1 nights).
- Mountain biking visitors spend on average \$2,540 per person during their stay (higher than the average visitor to Tasmania, \$1,920 per visitor).

References

¹ *Passion-first travellers were the key focus of 2020 KANTAR research, commissioned by Tourism Tasmania. The purpose of this research included gauging market size of potential future mountain biking visitors to Tasmania, developing an audience profile and understanding key drivers of destination choice.*
² *The Mountain Biking Situational Analysis was compiled from data collected in a series of qualitative interviews with tourism operators in the Tasmanian mountain biking industry in 2019, which formed a snapshot of mountain biking visitors to Tasmania.*
³ *Tasmanian Visitor Survey (TVS) statistics are published quarterly on Tourism Tasmania’s Corporate website. For the latest statistics, visit tourismtasmania.com.au/research/visitors*