



# QUEENSTOWN BIKING MARKET DEVELOPMENT PLAN

Final Report | October 2021





This report was prepared by TRC Tourism for Destination Queenstown in relation to the development of the Queenstown Biking Market Development Plan.

### DISCLAIMER

Any representation, statement, opinion, or advice expressed or implied in this document is made in good faith but on the basis that TRC Tourism Ltd., directors, employees and associated entities are not liable for any damage or loss whatsoever which has occurred or may occur in relation to taking or not taking action in respect of any representation, statement or advice referred to in this document.

### 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.

**Photo credit: Destination Queenstown**



©Copyright TRC Tourism Ltd | [www.trctourism.c](http://www.trctourism.c)



<u>Executive Summary</u>	<u>iv</u>
<u>Introduction</u>	<u>1</u>
<u>The Biking Opportunity</u>	<u>4</u>
<u>Current State</u>	<u>18</u>
<u>Future State</u>	<u>26</u>
<u>Benefits to Queenstown</u>	<u>39</u>
<u>Positioning Queenstown for Biking</u>	<u>43</u>
<u>Recommended Approach</u>	<u>44</u>
<u>Next Steps</u>	<u>56</u>
<u>Appendix A – Consultation</u>	<u>58</u>
<u>Appendix B – Biking Market Analysis</u>	<u>60</u>



## Executive Summary

The Queenstown Biking Market Development Plan ('The Plan') has been produced by TRC Tourism for Destination Queenstown (DQ). The Plan aims to enable DQ to assist the diverse range of biking stakeholders in developing and promoting the biking market in a coordinated and cohesive way. The Plan considers this from an overarching destination management perspective, with a key focus also being to identify ways in which wider benefits can be brought to the Queenstown community.

After an introduction outlining the above approach and objectives, The Plan begins with a look into the opportunity that the biking market represents to Queenstown. Overall, this is found to be a growing market with the potential to provide significant benefits to the community across the four wellbeings - economic, social, cultural, and environmental. The biking market is also found to display positive alignment to both the Queenstown community, and the visitor experience on offer. The report then provides an overview of the different styles or disciplines of biking and provides some clarification of the terminology used. Further market insights for the biking visitor are then presented, with the market divided between 'Holiday First' and 'Passion First' visitor types. The competitive landscape is also investigated, with the Queenstown biking offer compared directly against domestic, Australasian, and global counterparts.



The Plan then turns its attention to the current Queenstown biking offering. An overview of the current market position is first given, with Queenstown well regarded as a top mountain-biking destination for more technical disciplines such as Gravity/Enduro, Downhill, Flow, Freeride, and Park, and enjoying a favourable if slightly less 'famous' reputation when it comes to the more sedate riding styles of Cross-Country and Touring. The Queenstown biking experience is then outlined, with two main cycle trails and six mountain bike parks and hubs making up the bulk of the riding available. The report also makes note of Queenstown being fortunate to act as the 'gateway' to several quality biking trails in neighbouring regions.

The strengths and weaknesses of the current Queenstown biking experience are then explored. The strengths being:

- The Variety of trails available
- Favourable climate, location, scenery, and landscape
- Ease of accessibility
- Passionate local biking community
- Experiences and services available (Great Rides)
- Wider tourist experience that Queenstown provides.

Weaknesses are equally investigated, those being:

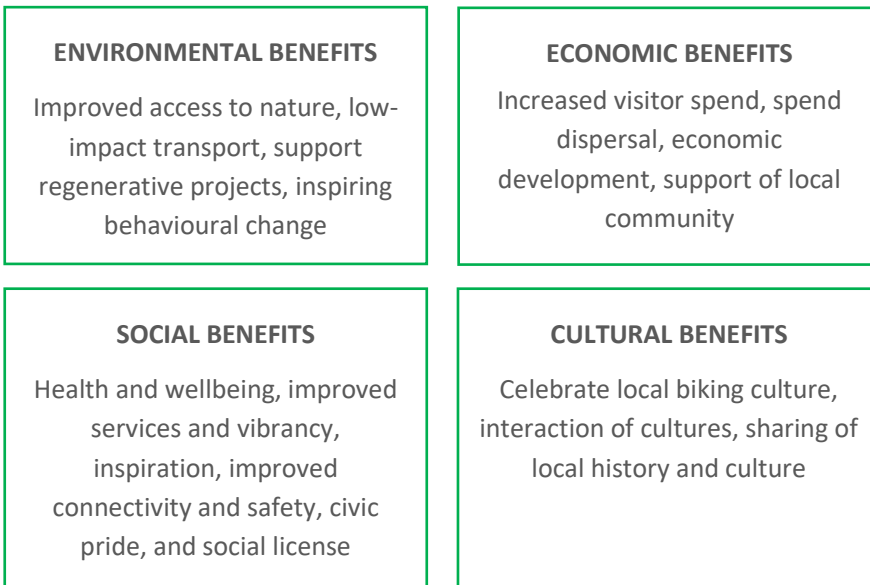
- Lack of guidance through the five stages of travel
- Shortages in biking infrastructure, facilities, and services
- Gaps in infrastructure and connectivity between trails
- Some gaps in the trail offering itself
- Lack of central welcome point.



The future state is then considered, with an overarching vision offered before outlining five main aspirations (outlined below), along with the opportunities and challenges associated with each of these:

1. Grow our rep, and our visitors
2. Make it easy, and awesome
3. Ensure an amazing experience for every rider
4. Look after the locals
5. Work together.

The Plan then dives deeper into the potential benefits for the Queenstown community of achieving this vision and aspirations, with these arranged across the four wellbeing pillars:



A positioning pyramid then attempts to distil the Queenstown biking opportunity down into a succinct articulation which leverages the region’s main strengths and appeals across the visitor segments and varying styles of riding. This work results in Queenstown’s biking brand essence being identified as ‘Epic Made Easy’.

Lastly, The Plan moves into providing recommendations in terms of the optimal approach required to achieve the aspirations identified. It achieves this by outlining the workstreams and associated actions recommended to both optimise the opportunities and minimise the challenges listed under each aspiration. And finally, by outlining a series of steps to put in place to ensure the contents of this document are harnessed and the development of the Queenstown biking opportunity is optimised.



## Introduction

The Queenstown biking sector is made up of incredibly passionate people all doing their best to provide an amazing biking experience for both local and visiting riders alike.

As a result of their hard work and passion, the Queenstown region now sits on the cusp of joining a handful of truly iconic ‘bucket-list’ biking destinations globally, with an opportunity to generate a multitude of ongoing benefits for the wider Queenstown community.

This Plan is here to help that happen.

Although Destination Queenstown’s core mandate has been to position, brand, market and create demand for the region, this project recognises the need to consider biking in Queenstown from an overarching destination management perspective to maximise the potential for sustainable growth of the opportunity and support by the local community.

It will achieve this by presenting an overarching **Biking Market Development Plan** to guide the biking community in Queenstown towards a cohesive and optimal offering. It also attempts to align with regenerative and diversification destination management strategies being put in place at the same time by Destination Queenstown, with a key focus on identifying ways in which wider benefits can be brought to the wider Queenstown community.

## OBJECTIVES

When developing this Plan, the main objectives were to:

- Validate Destination Queenstown’s focus on biking as a strategic visitor segment
- Deepen the understanding of the biking market across all types of categories by understanding the potential economic opportunity; uncovering consumer motivations, behaviour, and decision drivers; and identifying future trends to enable mid to long-term planning
- Engage community, industry, and government stakeholders to collectively assess the current state of offering within the Queenstown area
- Identify shared future aspirations of these stakeholders and the opportunities, barriers and recommended strategic actions required to achieving these
- Provide recommendations on positioning to inform Destination Queenstown’s PR, marketing, travel trade, media, and storytelling with regards to the biking market.

Developed primarily from engaging directly with the Queenstown biking industry along with relevant stakeholders and agencies, this document represents a co-designed Market Development Plan that articulates a unified, coordinated, and effective approach to the ongoing successful development of this market.

A key goal for this report is for Destination Queenstown to assist the diverse range of stakeholders involved in the biking market to contribute to future development and promotion in a coordinated and cohesive way, with acknowledgement of and responsibility for their respective roles in bringing this opportunity to life.

Using insights gathered throughout the review and stakeholder engagement phases, Destination Queenstown will also be equipped to prioritise the messages, stories, channels, and actions needed to unlock the biking market opportunity and establish Queenstown's identity as a biking destination.

## SCOPE

The bulk of this report is focused first and foremost on the biking opportunity specific to the Queenstown/Whakatipu Basin area. It is acknowledged that Queenstown is fortunate to act as the main gateway to neighbouring regions that also offer strong biking experiences, and that potential opportunities to partner with and leverage this wider regional offering may be well worth exploring in future, particularly as the trails become more interlinked. While there are occasional references to this opportunity throughout, the primary role of this document is to first clarify the opportunity available to the Queenstown biking community, which can then be appropriately aligned to our neighbours.

**It should also be noted that for the purposes of this report, the simple term 'biking' has been used as an umbrella term unless otherwise stated.** This refers to all biking types or styles other than road cycling, or indoor/track.







## The Biking Opportunity

As this is a growing market, targeting the potential biking visitor is highly likely to bring significant benefits to the Queenstown community.

### Global Popularity

Globally, the popularity of biking has exploded, with international mountain bike sales surging to record numbers since the COVID pandemic began, as people find respite from daily (and COVID) pressures in the great outdoors and realizing the positive impact time in nature has on mental and physical health. According to Market Research Future (MRFR), the mountain bike market is expected to grow at approximately 10% CAGR (Category Average Growth Rate) from 2020 to 2027.

### Widening Appeal

Traditionally dominated by middle-aged men, the biking market is spreading its appeal demographically. Additions and enhancements to both riding disciplines, equipment, and the quality of biking infrastructure is seeing increased youth and female participation rates. The introduction of e—bikes also encouraging older riders to give biking a try. This makes biking a holiday experience that appeals across a number of visitor types.

### People Travel to Bike + Bike when Travelling

There is a significant sized market of ‘holiday first’ travelers who like to participate in some form of biking as part of a wider holiday experience. In addition to this larger market, there is also a smaller but significantly influential ‘passion first’ market, who travel (and choose their holiday destination) solely for the purpose of biking.

### Year-round offering

Queenstown is fortunate that the climate, topography, and terrain on offer allows for biking of various forms regardless of season. This avoids the pitfalls of any ‘off-season’ - with the associated benefits able to be enjoyed year-round.

### Fit with the Queenstown Offering + Community

With the Queenstown Mountain Bike Club boasting over 1,600 members, biking is clearly a popular pastime within the local community. With international biking visitors known to be more likely to visit regions and be interested in visiting adventure activities and vineyards<sup>1</sup>, there is a high likelihood of the biking visitor enjoying the Queenstown offering and the Queenstown community embracing them in return.

### High Visitor Spend

Research by Tourism New Zealand showed tourists who participate in biking during their visit, spend ~50% more than average, with a significant portion of these visitors identified as ‘high-value’<sup>2</sup>. An economic impact assessment commissioned by the Queenstown Mountain Bike Club also showed a significant financial contribution to the local economy, with ~\$65 million being spent by mountain bikers per year, 90% of this coming from visitors<sup>3</sup>.

<sup>1</sup> <https://www.tourismnewzealand.com/markets-insights/sectors/special-interest/cycling-and-mountain-biking/>

<sup>2</sup> [https://www.tourismnewzealand.com/media/1764/cycling-tourism\\_profile.pdf](https://www.tourismnewzealand.com/media/1764/cycling-tourism_profile.pdf)

<sup>3</sup> [https://922a85a2-1f77-480a-8916-996ab20dc701.filesusr.com/ugd/2bf480\\_2ac911c18e9243a29952961ca99c4d90.pdf](https://922a85a2-1f77-480a-8916-996ab20dc701.filesusr.com/ugd/2bf480_2ac911c18e9243a29952961ca99c4d90.pdf)

Note: The potential benefits of the Queenstown biking opportunity are explored in detail in 'Potential Value to Queenstown' on the next page.

## THE POTENTIAL MARKET

Any person interested in biking in their hometown is more likely to bike whilst on holiday. Data on participation rates in key source markets and information on their behaviour whilst in New Zealand can provide some insight into the potential size of the biking market for Queenstown.

### The New Zealand Market

Participation trends captured by Sport NZ in 2019 shows that across NZ, about 10.2% of the population are interested in biking, with 6.2% participating in the previous year. This translates into an estimated available market of just under 500,000 kiwis interested in biking.

### The Australian Market

In Australia, the biking market size has been estimated at 388,900, just under 2% of the population. Australians are the most likely international visitors to ride bikes whilst on holiday in NZ. In 2019, just over 58,000 (3.8%) of visiting Australians rode a bike whilst they were on holiday here.

### The Rest of the World

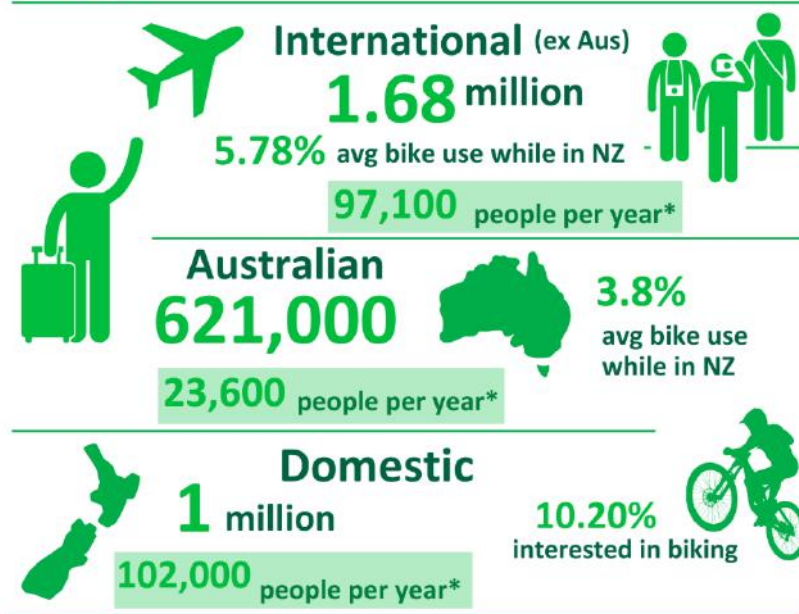
The rest of the world is unlikely to be an accessible market for some time. However, when they do return they will represent a lucrative market for

\*Estimates are based on previous visitor numbers to Queenstown and represent a rough estimate of the biking opportunity available under normal (non-covid) market conditions. Numbers are based on standard participation rates in cycling/biking in travelling populations whilst in NZ and are deemed to be conservative as those travelling to Queenstown are more likely to enjoy active pursuits: one in five visitors participate in an adrenaline activity. (DQ Queenstown Visitor Survey 20/21)

biking visitors to Queenstown, with an average biking participation rate of 5.78% whilst visiting New Zealand.

## Size of Biking Market for Queenstown

**3.3 million visitors** (Pre Covid)



### SIZE OF BIKING MARKET BASED ON VISITOR STATS

SHORT TERM (NZ DOMESTIC): 102,000 PER YEAR  
 MID-TERM (NZ & AUSTRALIA): 125,600 PER YEAR  
 LONG-TERM (GLOBAL): 222,700 PER YEAR

## POTENTIAL VALUE FOR QUEENSTOWN

### ECONOMIC



- Increased Visitor Spend
- Wide Dispersal
- Economic Development + Diversification
- Supporting local community

### ENVIRONMENTAL



- Improved public access to nature
- Creation of green corridors
- Low-impact transport
- Support regenerative projects
- Provide access for conservation initiatives
- Inspire behavioural change

### SOCIAL



- Improved health + wellbeing
- Improved connectivity + safety
- Improved civic pride + social license
- Improved services + vibrancy
- Inspiration, access + progression

### CULTURAL



- Share local history + culture
- Celebrate local biking culture + community
- Interaction of global cultures



## BIKING ENTHUSIAST TYPES + TERMINOLOGY

As mentioned, there are numerous variations and inconsistencies in terms of the terminology used throughout the world to describe the various stages of bikers themselves, and the different forms of biking styles on offer. The following table pulls together several different approaches used in similar contexts, which has then been adjusted to align specifically with the Queenstown biking context.

### CLASSIFICATION OF RIDERS

TYPE OF RIDER	DESCRIPTION	MARKET POTENTIAL
<b>Leisure/Recreation</b>	General cyclists of all ages and abilities who ride infrequently, often have limited skills and require very accessible trails. They are not members of clubs and 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.	<b>Significant</b>
<b>Enthusiast</b>	Enthusiasts ride weekly and have moderate skills and variable fitness. They are typically aged 29-49 and while are not competitive, want to improve their skills and progress their ability each time they ride. They prefer trails with good trail signage and seek technical but not too challenging trails.	<b>Significant</b>
<b>Gravity</b>	Highly skilled technical riders who seek very challenging trails, typically ride at least once a week and are often members of clubs. Gravity riders seek purpose-built trails with the highest classification, which are repeatedly used in a concentrated manner.	<b>Small but influential (growing rapidly)</b>
<b>Independent</b>	Skilled outdoor enthusiasts who ride once a week and are technically proficient with a good level of fitness. Often involved in other outdoor activities, they are capable of planning their own rides and ride a very wide variety of trail classifications. The adventurous aspect is more important than the technical challenge and they seek more remote trails.	<b>Small but growing</b>
<b>Sport</b>	Competitive mountain bikers, who ride regular routes multiple times a week and are members of mountain bike clubs. 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.	<b>Small but influential</b>

## BIKING DISCIPLINES RELATIVE TO QUEENSTOWN

DISCIPLINE	DESCRIPTION	MARKET POTENTIAL
<b>Recreational</b>	Recreational trail riding is typically on reasonably uniform surface conditions and lower grades. Similar trail type and bike design to those used in bike-packing, but completed in smaller, more leisurely timeframes and distances.	Mass-market: ideal for leisure/recreation riders.
<b>Bike-packing</b>	Bike-packing trails are trails or long-distance circuits with a focus on reaching a destination. Can include rail trails, access/fire roads and single track.	Limited market, but trails can be ridden in sections (cross-over with recreational trails).
<b>Gravel</b>	Gravel, or 'mixed surface' is a discipline that can take riders through a varying array of terrain. Riders may transition from pavement to gravel, dirt, or sand. Often gravel riding is on access roads, or private tracks.	One of the most popular and fastest-growing disciplines in recent times.
<b>Cross Country</b>	Primarily undulating single-track and back-country trails with a combination of climbing and descending, and natural trail features of varying technicality.	Appeals to the majority of the mountain biking market.
<b>Trail Riding</b>	Similar to cross-country but leans more towards the adventurous side of biking. Trail riding is very much an 'all-rounder' category, with a mix of climbing, descending and 'flow trails' typically of grade 3-4 singletrack.	Appeals to the majority of the mountain biking market.
<b>Gravity/Enduro</b>	Emphasis on steep, fast, technical descents. Gravity/Enduro appeals to more experienced riders who enjoy technical descents but are still happy to ride back to the top of the trail.	Appeals to more experienced riders.
<b>Downhill</b>	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 usually require uplift to the trailhead via chairlift or vehicle shuttling.	Typically appeals to more experienced rider, however green (easy) downhill trails are emerging to cater for all experience levels.
<b>Jump Park</b>	Built feature environments with an emphasis on manoeuvres, skill development and progression. Can include Jump and Pump tracks and Skills Parks. Typically, dirt surfaced but can include hardened surfaces as well.	Appeals to a wide market including youth. Can cater for competitions judging aerial manoeuvres.



## MARKET INSIGHTS

From a tourism perspective, the biking visitor market is broadly divided into two segments, those being:

1. 'Holiday first' Bikers
2. 'Passion first' Bikers

Although the travel and biking behaviour of these two segments are considerably different, they are both important to the success of a destination seeking to maximise the biking infrastructure available in the area.

An overview of the two segments is provided below.

## 'Holiday First' Bike Markets

The 'Holiday First' biking market refers to people who go on holiday to Queenstown for any reason number of reasons but not specifically to bike. However, while they are on holiday or as part of their overall planning, they decide to bike as part of a broader holiday experience.

'Holiday First' visitors do not always bring their bikes with them if they have one at all. They value a range of trail options that are accessible and accurately labelled in terms of difficulty, with a supporting shop/gear hire hub that provides welcoming service and good advice. They also value transport connections and uplifts to trails or trailheads ideally within riding distance of the town. They may not access 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. Trail quality, wayfinding, appropriate trail length and a clear reward in terms of access to nature, solitude, and features such as rivers or views are also key factors for 'Holiday First' bikers.

'Holiday First' bikers represent the vast majority of the overall biking visitor market.

**Table 1.** Holiday market

HOLIDAY	
<b>What they do</b>	- Go biking whilst on holiday
<b>Who are they?</b>	- Mostly couples (78%) - 29% with children - 23% travelling with friends
<b>Main segments</b>	- Leisure - Enthusiast
<b>Favourite styles of riding</b>	- Recreational - Gravel - Trail Riding - Cross Country
<b>Relative size &amp; influence</b>	- Larger, less influential
<b>Trail needs</b>	- Diversity of trails - Long, flowy trails - More beginner with intermediate options
<b>Related needs</b>	- Accurate information (grading and signage) - Quality hire shops - Transport & transfer options - Achievable Iconic image capture spot/s - Points of interest/commerce (e.g. café, pub, shops) on-trail.
<b>Ancillary needs</b>	- Restaurants and Cafes - Shopping - Sightseeing - Toilets



## 'Passion First' Bike Markets

'Passion First' biking visitors are those who travel for the express purpose of biking.

Typically, but not always, they will bring their 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 a downhill or e-bike, and to provide local knowledge on the best tracks, and good places to eat and drink.

The quality of trails and riding opportunities available are at the core of 'Passion First' bikers' destination preferences, but for 'serious' riders, the destinations are evaluated as they seek to collect new experiences that align with their skill level. Off the bike, 'Passion First' visitors 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.

'Passion First' riders represent a much smaller, but highly influential group within the wider biking visitor market.

**Table 2.** Passion first market:

PASSION FIRST	
<b>What they do</b>	- Go on holiday to bike
<b>Who are they?</b>	- Mostly white males aged 25-65 who travel in groups of friends - Gender and age group diversity is growing with youth, women and older demographics enabled by e-bikes - Highly educated, higher than average income. Often either professionals or retirees
<b>Main segments</b>	- Sport - Independent - Gravity/ Enduro
<b>Favourite styles of riding</b>	- Cross Country - Trail Riding - Gravity Enduro - Downhill - Jump Park
<b>Relative size &amp; influence</b>	- Small but growing, elite riders are influential
<b>Trail needs</b>	- Diversity of trails - Connected pathways - More intermediate with difficult options, and some easy. - Skills development park
<b>Related needs</b>	- Opportunity to progress - Quality hire & retail bike shops - Coaching and guided tour opportunities - Bike-care amenities (bike racks, repair/wash stations) - Accurate information (grading and signage) - Transport & transfer options - Challenging and achievable Iconic image capture spots
<b>Ancillary needs</b>	- Craft breweries and distilleries - Quality food (e.g., Fergburger, Atlas Bar) - Toilets



## COMPETITIVE LANDSCAPE

DOMESTIC		
	ROTORUA (NZ)	NELSON (NZ)
<b>TRAIL NETWORK<sup>4</sup></b>	180 km	427 km
<b>TRAILFORKS RIDES<sup>5</sup></b>	182,625	37,883
<b>TERRAIN</b>	<ul style="list-style-type: none"> <li>- Vertical / elevation</li> <li>- Variety: loam, rock rolls, tech, wooden features, high speed jump trails</li> <li>- Forest trails with Tree cover</li> </ul>	<ul style="list-style-type: none"> <li>- Famous for steep hills and rough natural terrain</li> <li>- Flow and downhill through forests and to beaches.</li> </ul>
<b>EVENTS</b>	<ul style="list-style-type: none"> <li>- Rotorua Bike Festival (annual, 10 days)</li> <li>- Crankworx Festival</li> <li>- Whaka100</li> <li>- Giant 2W Gravity Enduro</li> </ul>	<ul style="list-style-type: none"> <li>- Top Gun</li> <li>- Mammoth Enduro</li> <li>-</li> </ul>
<b>STRENGTHS</b>	<ul style="list-style-type: none"> <li>- Proximity to Auckland</li> <li>- Ferns (beauty)</li> <li>- Uplift structure (Skyline)</li> <li>- Crankworx – internationally renowned</li> <li>- Full range of services – MTB hire, bike shops, skills clinics, cafes, dining, accommodation</li> <li>- Ease of accessibility –5 mins from downtown</li> <li>- Huge range of MTB events</li> </ul>	<ul style="list-style-type: none"> <li>- IMBA Gold Ride Centre</li> <li>- Billed as one of only six places in the world where you can experience the true meaning of MTB Paradise</li> <li>- Views of and access to Abel Tasman National Park, valleys, forest and bushland</li> <li>- Year-round riding</li> <li>- Supporting tourism infrastructure</li> <li>- Proximity to other attractions</li> <li>- Enthusiasm of local biking clubs and individuals</li> </ul>

QUEENSTOWN (NZ)
314km
50,573
<ul style="list-style-type: none"> <li>- Big vertical change/elevation</li> <li>- Variety including rock rolls, tech, wooden features, jump trails.</li> <li>- Extensive touring trails network with low grade.</li> <li>- Areas of forest trails with tree cover</li> </ul>
<ul style="list-style-type: none"> <li>- Wakatipu DH World Champs</li> <li>- Macpac Motatapu</li> <li>- McGazzaFest</li> <li>- Cyclorama</li> <li>- Future: Queenstown Bike Festival &amp; Crankworx Summer Series</li> </ul>
<ul style="list-style-type: none"> <li>- Wide variety of trails.</li> <li>- High quality build of trails</li> <li>- Extensive trail network with multiple uplift infrastructure.</li> <li>- Stunning natural beauty/ scenery in the landscape.</li> <li>- Wide range of support services available.</li> <li>- Ease of accessibility – 5 mins from downtown</li> <li>- World-class visitor destination with established reputation</li> <li>- Passionate local biking community</li> <li>- Proximity to other renowned trail networks – Wānaka, Central Otago.</li> <li>- Year-round riding (snow in winter does limit some riding).</li> <li>- Majority of trails free to access</li> <li>- Variety of accommodation options</li> </ul>

<sup>4</sup> Trailforks Data

<sup>5</sup> Trailforks Data

---

**WEAKNESSES**

- 'No atmosphere' – lacking in the highly social aspect of the sport
- Limited MTB supporting infrastructure.
- Difficult to access.

- Gaps in progression between beginner – intermediate trails
- Lack of trail connection (e.g. from airport to town centre)
- Gaps in interconnection of trails, with vehicle transport or on-road cycling often required

## AUSTRALASIA (Southern Hemisphere)

	DERBY (Tasmania, AUS)	MT BULLER (Victoria, AUS)
<b>TRAIL NETWORK<sup>6</sup></b>	125km	149 km
<b>TRAILFORKS RIDES<sup>7</sup></b>	34,237	10,912
<b>TERRAIN</b>	<ul style="list-style-type: none"> <li>- Gravity flow trails through temperate rainforest</li> <li>- Variety: loam, rock rolls, tech, wooden features, high speed jump trails</li> <li>- Single tracks</li> <li>- Pump track</li> </ul>	<ul style="list-style-type: none"> <li>- Widely varied for all types of biking</li> <li>- Over 100kms of cross-country trails – including 40kms of single track</li> <li>- 16 km uphill road climb</li> <li>- Extensive cross-country trails</li> <li>- Gravity feed downhill trails</li> <li>- Pump track</li> </ul>
<b>EVENTS</b>	<ul style="list-style-type: none"> <li>- Enduro World Series</li> <li>- Dragon Trail MTB</li> <li>- Wildside MTB race</li> </ul>	<ul style="list-style-type: none"> <li>- Vic Downhill Mountain Bike Series</li> <li>- Bike Warrior High Country</li> <li>- GT Bike Buller Festival</li> </ul>
<b>STRENGTHS</b>	<ul style="list-style-type: none"> <li>- Voted the best trail in the world by the Enduro World Series twice.</li> <li>- Quality brown powder dirt in pristine wilderness</li> <li>- Diverse landscape and terrain</li> <li>- Proximity to other renowned trail networks – St Helens and Maydena.</li> <li>- Established reputation as a leader in nature-based and adventure tourism</li> <li>- Luxury accommodation options</li> <li>- Enthusiasm of local biking clubs and individuals</li> <li>- Known as Australia’s mountain biking capital</li> </ul>	<ul style="list-style-type: none"> <li>- Well established network which is still expanding</li> <li>- Four lift accessed trails</li> <li>- Bike hire is an option</li> <li>- Close-ish to Melbourne (three hours)</li> <li>- Home to Australia’s first flow track (copperhead)</li> <li>- The Southern Hemisphere’s only IMBA epic trail (the alpine epic – 46km descending cross country trail)</li> <li>- Aussies biggest pump track</li> <li>- Home to Australia’s only accredited IMBA Ride Centre</li> </ul>
<b>WEAKNESSES</b>	<ul style="list-style-type: none"> <li>- Isolated location – from Australia and international markets</li> <li>- Limited supporting infrastructure (accommodation, food, hire and shops)</li> </ul>	<ul style="list-style-type: none"> <li>- Limited options for food and accommodation. Primarily a ski resort town and shuts down over winter</li> <li>- Requires driving to access</li> </ul>

<sup>6</sup> Trailforks Data

<sup>7</sup> Trailforks Data

## GLOBAL

	WHISTLER	FINALE LIGURE (Italy)
<b>TRAIL NETWORK<sup>8</sup></b>	1,420 km	376km
<b>TRAILFORKS RIDES<sup>9</sup></b>	745,730	54,337
<b>TERRAIN</b>	<ul style="list-style-type: none"> <li>- Widely varied for all types of biking from a family cruise in valleys, high velocity downhill</li> <li>- 668 MTB trails, 227 e-bike trails</li> <li>- Wide variety of difficulty levels with a focus on blue and black diamond.</li> </ul>	<ul style="list-style-type: none"> <li>- Rocky and steep terrain leading to the Mediterranean Sea.</li> <li>- Every type of singletrack terrain from sharp, jagged rocks to smooth winding forest descents with everything in between</li> </ul>
<b>EVENTS</b>	<ul style="list-style-type: none"> <li>- Full event schedule over Summer including:</li> <li>- Crankworx</li> <li>- Canada Cup &amp; BC Cup XC and DH</li> <li>- Bars of Fury SRAM Dual Slalom</li> </ul>	<ul style="list-style-type: none"> <li>- Enduro World Series</li> </ul>
<b>STRENGTHS</b>	<ul style="list-style-type: none"> <li>- Known as the most famous and popular bike park in the world. Has the top checked-in trail in the world on Trailforks.</li> <li>- Enormous variety of tracks and trails for all levels.</li> <li>- Extensive network of tracks.</li> <li>- Significant supporting infrastructure.</li> <li>- Mature tourism destination with full range of support structures for riding, including uplift, visitor services, hire and service shops, accommodation at all levels.</li> <li>- Product aligned to culture and needs of market.</li> <li>- Enjoys the favour of MTB influencers.</li> </ul>	<ul style="list-style-type: none"> <li>- All hour's quality food, night experiences.</li> <li>- Cultural experiences – olive groves, farmhouses, old war bases, Italian food and hospitality.</li> <li>- Proximity to the Mediterranean Sea</li> <li>- Proximity to other European experiences.</li> <li>- Diversity of trails.</li> <li>- Year-round destination for Europeans.</li> <li>- Significant supporting infrastructure.</li> <li>- Mature tourism destination with full range of support structures for riding, including uplift, visitor services, hire and service shops, accommodation at all levels.</li> <li>- Product aligned to culture and needs of market.</li> <li>- Enjoys the favour of MTB influencers.</li> </ul>
<b>WEAKNESSES</b>	<ul style="list-style-type: none"> <li>- Very large, possibly intimidating for some riders.</li> <li>- Expensive and a long way to travel for markets close to NZ.</li> <li>- Northern summer destination – not winter.</li> </ul>	<ul style="list-style-type: none"> <li>- Trail quality lower than in other places.</li> <li>- Very rocky.</li> <li>- Expensive and a long way to travel for markets close to NZ.</li> </ul>

**Please note:** For the purposes of this report, the number of competitors compared per region has been kept to two. It is acknowledged that there are several additional competing destinations within the domestic, Australasian, and global context.

<sup>8</sup> Trailforks Data

<sup>9</sup> Trailforks Data



## Current State

### MARKET POSITION

The widespread view of the local biking community is that Queenstown is regarded as one of the top biking destinations within the southern hemisphere.

While it is generally acknowledged that Queenstown offers a variety of trail types accommodating a wide range of preferences and skill-levels, its reputation within the international context is predominantly focused on the more advanced or technical disciplines Gravity/Enduro, Downhill and Jump Park. Anecdotally, the area enjoys an extremely favourable reputation within some of the most influential circles of the global mountain biking community, including associated international media, professional athletes and teams, manufacturers, and sponsors.

Validating the viewpoint of the average visitor and local proves difficult however, with a multitude of competing destinations both within New Zealand (Rotorua, Nelson, Taupo, Christchurch), Australasia (Tasmania, Victoria) and further abroad (Whistler, Squamish, Colorado, Utah, Finale Ligure), to name just a few, also enjoying strong and growing global reputations. There is no denying Queenstown's position within the upper echelons of this group however, with RedBull rating the Gorge Road Jump Park as '*possibly the best dirt jumps on Earth*' in 2016, and numerous articles found online mentioning the area as a 'bucket-list' mountain biking destination.

Whilst the Queenstown offering for this highly skilled/technical style of riding may only appeal to a (comparatively) small sub-segment of the 'Passion First' visitor market, it is nonetheless extremely valuable for the area as a biking destination, creating a 'halo' effect that filters down the wider visitor market.

When it comes to less technical riding (e.g., Recreational, Bike-packing, Gravel, and Cross-Country trails), Queenstown also offers a high-quality selection, with two of the '22 Great Rides of New Zealand' easily accessible, several additional touring trails available and more in development (including the Kawarau Gorge Link and developments in Glenorchy).

Comprehensive in its offering and more advanced than most biking destinations in terms of commercial biking experiences and support services on offer, Queenstown enjoys a favourable, if not as 'famous' market position within the "less technical" biking segment. The *Queenstown Trail* is considered one of New Zealand's most popular 'Great Rides' in terms of visitor numbers (hosting over 100,000 riders per annum) but alongside '*Around the Mountains*' is part of a large pack of arguable equals spread throughout New Zealand, with competition within these riding disciplines only set to grow as regions continue to focus on and develop their 'cycle trail' offerings.

Offsetting this strong competition is Queenstown's popularity domestically and internationally as a tourism destination in the wider sense, with around 3.3 million people visiting the area in 2019 prior to COVID-19. As the 'Home of Adventure', a significant proportion of people visiting Queenstown will show some interest in the sport and fall into the 'Holiday First' mountain bike market.



## EXPERIENCE OFFERING

One of Queenstown's main strengths as a biking destination lies in the variety of trails easily available, and the quality of these trails.

For more technically minded mountain bikers, there are six recognised bike parks or hubs in and around the Queenstown area, offering trails as diverse as cruisy Flow riding to gnarly Downhill, Gravity/Enduro and Jump Park tracks.

For those looking for a gentler pace, there is an extensive network of scenic cycle trails to explore, from short scenic rides to multi-day journeys including easy access to two of New Zealand's 22 Great Rides. The quality and variety of this offering means there is a biking experience on offer for everyone, regardless of age, ability, or biking style.

Queenstown is also very fortunate to act as the 'gateway' to a number of quality biking trails in neighbouring regions.

### Cycle Trails

#### Queenstown Trail

The [Queenstown Trail](#) offers over 130 kms of easy – advanced (grade 2-4) riding between Queenstown, Jack's Point, Arrowtown, and Gibbston. Winding through vineyards, historic sites, and suspension bridges, and offering stunning alpine vistas, visitors can ride a small section or bike the whole trail at their leisure. Recommended itineraries range anywhere from one hour to four days in length, with a range of operators offering quality support services.

#### Around the Mountains

Offering 186 km of easy-intermediate (grade 2 – 3) riding on wide, well-graded paths, [Around the Mountains](#) cycle trail connects Walter Peak with Kingston and is another 'Great Ride' easily accessible from Queenstown. It is best enjoyed as a 4–5 day journey making the most of local hospitality and the endless mountain views.

#### Glenorchy Trails

Currently being developed, the Glenorchy Trails will be a combination of community-built and DoC-managed trails offering walking and cycling at the head of Lake Whakatipu. In addition to providing safe recreational riding for both the local community and visitors, the Glenorchy Trails Trust also aim to implement the missing link in the Te Araroa Trail between Queenstown and Greenstone valley via Glenorchy and Kinloch.

#### Neighbouring offers

- Lake Dunstan Trail (Central Otago): 55km of easy (Grade 1-2) riding between Clyde and Cromwell along Lake Dunstan, and the Kawarau and Clutha rivers.
- Central Otago Rail Trail (Central Otago): 152km walking, cycling and horse riding track flat, unsealed track between Middlemarch and Clyde.
- Nevis Road (Central Otago): 73km unsealed (gravel) back road between Bannockburn and Garston with lots of hill climbs and river crossings

## Mountain Bike Areas

### Queenstown Bike Park

Situated on the edges of Queenstown town centre and accessible via the nearby Skyline Gondola (or access road), the [Queenstown Bike Park](#) boasts over 30 trails ranging from easy (grade 2) through to extreme (grade 6) riding. With a 450m vertical descent, trail types on offer range from flow and downhill progression to more technical downhill and freeride.

### Coronet Peak

Outside of the winter (snow) months, [Coronet Peak](#) offers flow, cross-country and downhill trail types ranging from grades 3 – 6. Accessible either by shuttle or the Coronet Express chairlift, nearby rides include the world-famous Rude Rock, Hot Rod, Slip Saddle and Zoot tracks. When some of these trails are linked, Coronet also boasts one of the largest vertical descents in the southern hemisphere.

### Cardrona

Offering some of the longest vertical descents in New Zealand including the popular 'Peak to Pub', the [Cardrona Bike Park](#) features a variety of lift-accessed flow, downhill and freeride trails for all levels of rider to enjoy. Additional offerings include a free zone for learners, gear hire, lessons, and shuttle services.

### 7 Mile Scenic Reserve Mountain

A trail network offering riding for all skill levels, [7 Mile Bike Park](#) is located approximately 10km south-west of Queenstown. With a range of jumps, berms, log rides and banked corners adding challenge for expert riders, most trails also offer lines for less experienced riders alongside the technical routes, making it perfect for all levels to practise and develop skills.

### Fernhill Bike Park (Wynyard Bike Park)

Located close to the Queenstown Bike Park, [Fernhill Bike Park](#) attracts all levels of rider, from absolute beginner to expert and pro. Fernhill boasts a freeride jump park, with the famous 'Dream Track' offering some of the largest public jumps in the world, and the 'Mini Dream' providing a great opportunity for less experienced riders to practise and progress.

### Gorge Road Jump Park

Widely regarded as one of the best jump park facilities in the world for BMX and hard-tail mountain bikes, the [Gorge Road Jump Park](#) offers a huge area with more than 40 jumps that attracts dirt-jump enthusiasts from around the world.

### Neighbouring offers

- Bike Glendhu (Wānaka): Mountain bike park 15 minutes from Wānaka with 30km of trails for every level, and a 100+ feature jump line
- Sticky Forest ( Wānaka ): Network of over 20x single tracks located just out of the Wānaka town centre
- Lismore Jump Park (Wānaka): Jump track in central Wānaka with fast, technical trails, dirt tabletops and wooden features.

## STRENGTHS

Queenstown has most of the key ingredients needed to further strengthen its reputation as one of the world's preeminent biking destinations, both for 'Holiday First and 'Passion First' visitor types.

### Trail offering

Queenstown outshines many of its competing destinations in the variety of trails it has to offer across the different riding styles, particularly when compared to rival New Zealand destinations. This satisfies a broad market of rider-types and skill-levels and provides the opportunity for visitors to progress as they improve their biking prowess during, or across visits.

Trails are almost exclusively free to access and are widely recognised as being of a very high build standard, which is an important factor in destination choice, particularly for 'Passion First' mountain bikers looking for more technical riding.

- Variety of trails
- Challenging/technical mountain biking trails.
- Majority are free to access
- High quality trails
- 3x lift-assists
- Access to 2x 'Great Rides' cycle trails
- World-class Jump Parks
- Ability to progress

### Climate + Location

Unlike some other biking destinations that need to close over the winter months, Queenstown's climate, steep topography and trail locations means it offers year-round riding, even within the core snow/ski season of June - September.

Queenstown also benefits greatly from its southern hemisphere location, with many northern hemisphere-based professional riders choosing Queenstown as their off-season training base. This is an important benefit for the wider biking market, as in many situations it helps Queenstown avoid directly competing with its northern hemisphere contemporaries as potential visitors work within their availability for holidays. It allows for those passionate riders who are based in some of these other locations to visit Queenstown while they are unable to ride at home.

- Ski in the morning, bike in the afternoon
- Can pretty much bike year-round (no snow in valley)
- Shoulder seasons offers best conditions
- Southern hemisphere = off season training for northern pro teams
- Reduced direct competition for season
- Ability to offer an off-season option for 'Passion first' visitors from seasonal biking locations.

## Scenery & Landscape

With rugged alpine tops, beautiful lakes, clean rivers, and native bush all sitting on the township's doorstep, Queenstown has a well-deserved reputation for its breath-taking natural scenery both domestically and internationally.

Whilst providing breath-taking vistas, the surrounding topography allows bikers easy access to a variety of terrain, with both rolling lakeside or valley trails and steep, technical vertical descents all readily available.

- Beautiful views
- Variety of terrain

## Accessibility

Queenstown is conveniently placed when it comes to biking of most ability levels and styles, with many trails located reasonably close to the township and easily accessible via shuttle, rental car, or by bike-ride itself.

The three lift-assisted mountain biking parks provide further trail options for mountain bikers, opening large swaths of 'back country' that may otherwise have proved to be inaccessible, or at least less comfortable, for those visitors unfamiliar with riding such terrain.

Logistically, the Queenstown International Airport also provides a great strength for the region, with flights from main domestic centres operating regularly, and direct flight routes with Australia well established.

- Most trails are easy to get to, everything is reasonably close
- Easy access to 'back country'
- International Airport with direct links to NZ domestic centres and Australia.

## Local biking community/adventure culture

Queenstown has an extremely strong biking community passionate about riding in all its forms. As the well-established 'Home of Adventure', local riders tend to share the same adventurous mindset and accompanying outdoor lifestyle that permeates throughout the Queenstown community in general, and which attracts like-minded visitors from all around the world.

This unique biking culture has resulted in a range of free to access trails being built by the well-regarded Queenstown Mountain Bike Club and its local volunteers. These passionate locals help to ensure there is plenty of experience, advice, and support, along with trails to ride, readily available to everyone.

- Passionate, friendly biking culture
- Local experience + advice
- Like-minded (adventurous/outdoorsy) people from around the world
- Biking icons casually mixing with everyone
- Local enthusiasts ensure trail offering remains fresh and top quality.

## Trail experiences & services (Great Rides)

The two 'Great Rides' cycle trails offer a superior level of commercial tourism experiences and support services when compared to similar touring trails around the country. This encompasses both primary biking products such as guided tours, bike hire, and shuttles, and extends to aligned secondary (off-trail) experiences such as wine tours, art galleries, hospitality, and accommodation options.

- Superior biking product + support services (Great Rides)
- On-trail + off-trail experiences.

## Wider Experience & Reputation

One of Queenstown's greatest strengths compared to other biking destinations is what else it offers off the trails. As an internationally renowned tourist destination, Queenstown boasts a multitude of scenic attractions, outdoor activities, and exciting experiences for biking and non-biking visitors alike. The vibrant town centre provides quality hospitality and entertainment venues, and a high-calibre events calendar ensures there is always something going on.

This, combined with its highly regarded biking offering, has resulted in Queenstown being widely admired as a bucket-list destination to visit for both 'Holiday First' and 'Passion First' visitor types, and has greatly helped the rise of Queenstown's global reputation within influential biking circles – attracting some of the leading mountain bikers in the world to come and see for themselves what all the fuss is about.

- Internationally renowned tourist destination
- Vibrant town with great hospitality scene + entertaining events etc
- Other (similar) activities and experiences on offer
- Strong on-trail offering (wineries/cafes)
- Biking events = entertaining spectacle for bikers + non-bikers
- Positive reputation within global biking media, attracts the best in the world.



## WEAKNESSES

Despite the above strengths, there are a number of ways in which Queenstown can be improved in its offering as an internationally renowned biking destination.

### Lack of guidance through customer journey

To attract biking visitors to the Queenstown area it is essential that they are enabled to move through the five stages of travel (*dreaming, planning, booking, experience, sharing*) easily and confidently. Though there is plentiful information and content surrounding the Queenstown biking offer available online, the information is presented in a very fragmented and siloed way, with no clear pathway through the second and third stages of travel in particular (*planning, booking*). This makes it difficult for a potential visitor to gain the right information and have confidence in planning and booking their Queenstown biking experience.

This lack of a clear pathway also extends through the last two stages of travel (*experience, sharing*), with again no definitive guidance provided in terms of maximising their experience once they have arrived, and guidance or incentives in the sharing of this experience with others.

- Queenstown biking information fragmented and siloed
- Limited guidance once arrived to maximise experience
- Limited guidance or incentive to share experience with others.

### Infrastructure + Connectivity

Like much of New Zealand, Queenstown is still very much car-centric with regards to its transport infrastructure. The existing trail network is also fairly disconnected, often situated in pockets of public estate surrounded by privately held land. Whilst there are initiatives in place to start improving non-vehicle travel links, accessing many of the trails on offer, or transitioning between them, still relies heavily on vehicle transport, or the often-uncomfortable option of cycling on the narrow and winding New Zealand roads.

- No direct connection between airport and the Frankton trail (without riding on road)
- Vehicle transport or on-road cycling often required (shared with heavy traffic)
- Lack of connectivity to, or between trails.

### Facilities + Services

Compared with other leading biking destinations globally, Queenstown is lacklustre in terms of its offering of facilities and supporting services to cater for the needs of the biking visitor.

In terms of facilities, while there are some basic provisions in place, the lack of such offerings as lockable bike stands, e-bike charging stations, water-bottle refill stations, and bike cleaning and maintenance facilities in and around key areas, when coupled with the infrastructure and connectivity issues described above, means Queenstown is not regarded as offering a particularly 'bike-friendly' town centre.

Added to this is a restricted availability of bike racks from both rental cars and the public transport (bus) system, and only limited bike storage available from most local accommodation providers.

- Limited lockable bike stands around town
- No E-bike charging stations
- Limited bike wash facilities
- Limited bike storage at accommodation
- Limited bike racks for rental cars + public transport.

### Gaps in Trail Options

Though regarded as one of its strengths, Queenstown does have some gaps or weaknesses in its overall trail offering.

There is a perceived lack of approachable, or 'bridging' (grade 2-3) trails linking the wider trail network together. These gaps typically fall within the mid-tier 'Cross Country' and 'Trail Riding' riding disciplines, and without them there is a danger that less proficient or technically able riders may sometimes feel forced to 'step up' to higher graded (4+) trails and riding styles prematurely in order to progress.

There is also no pure 'linear' overnight cycle-trail or multi-day adventure rides currently available in the region – both being important in attracting 'Passion First' visitors. Though both the 'Queenstown' and 'Around the Mountains' trails do provide recommended itineraries of up to 4-5 days riding, their associated accommodation options are not strategically positioned along the trail, which would allow for a truly linear 'ride in, ride out' overnight biking experience. (Note: when combined, the new 'Lake Dunstan Trail', and planned 'Kawarau Gorge Trail' will establish an opportunity to develop such an experience offer).

Queenstown also has little offering in terms of cross country (XC) riding, one of the most popular biking disciplines globally.

- Lack of 'mid-tier'/bridging trails connecting network
- Limited Cross-Country and 'Trail Riding' category of trails
- Minimal 'ride-in, ride-out' overnight cycle-trail or multi-day adventure rides currently available.

### Lack of welcome point

It was noted that Queenstown lacks any notable 'hub' for the biking community.

While this may not be a weakness in the eyes of the visitor, it means that there is no central location in which the wider biking community (both locals and visitors) can congregate or be welcomed into. This has the potential consequence of making it harder than it needs to be for visitors to connect into the local biking community, industry, and associated support services.

- No central location to be welcomed into/connect with other bikers
- Supporting industry/services harder to find.

---

## Future State

### VISION

---

***‘Queenstown is the southern hemisphere's premier biking destination that biking visitors from New Zealand and around the world aspire to visit’.***

*It is the ‘Home of Adventure’, a place where visitors, the local biking industry, and the wider Queenstown community proudly come together to celebrate biking in all its forms, and the wide benefits that it brings to everyone.*

---





## ASPIRATIONS

				
<p><b>1. Grow our rep, and our biking visitors</b></p>	<p><b>2. Make it easy, and awesome</b></p>	<p><b>3. Ensure an amazing experience for every rider</b></p>	<p><b>4. Look after the locals</b></p>	<p><b>5. Work together</b></p>
<p>Biking visitor numbers sustainably grow as Queenstown becomes THE place to bike in the Southern Hemisphere.</p>	<p>Everything about planning, booking, and experiencing a biking holiday in Queenstown is made easy and optimised.</p>	<p>Queenstown is widely recognised as a 'bike town', offering a welcoming, safe, and hugely rewarding experience for all biking enthusiasts.</p>	<p>Biking is celebrated for its positive contribution to the Queenstown community.</p>	<p>The Queenstown biking community is cohesive and collaborative.</p>
<p>Queenstown is widely recognised as a place where all biking enthusiasts, from absolute beginners to the best athletes in the world and across riding styles, come together to participate and rejoice in their shared passion.</p>	<p>From the moment a biking enthusiast starts planning a Queenstown biking experience, to the moment they leave, everything has been made as easy, accommodating, and enjoyable as possible.</p>	<p>Queenstown offers a high-quality, rewarding biking experience for everyone, regardless of their preferred trail type, riding style, skill, or fitness level.</p>	<p>The ongoing development of the local biking sector brings with it numerous benefits widely felt throughout the Queenstown community, resulting in both local and visiting riders being warmly regarded, and feeling good about the positive contribution they are making.</p>	<p>The local biking industry are united in their shared passion and work together using a collaborative advantage approach to ensure the Queenstown biking experience is optimised for everyone, from both a recreational and commercial point of view.</p>

## OVERVIEW

**VISION:** QUEENSTOWN IS THE SOUTHERN HEMISPHERE'S PREMIER BIKING DESTINATION THAT BIKING VISITORS FROM NEW ZEALAND AND AROUND THE WORLD ASPIRE TO VISIT'.

**BRAND ESSENCE:** EPIC MADE EASY

ASPIRATION	<b>Grow our rep, and our biking visitors</b>	<b>Make it easy, and awesome</b>	<b>Ensure an amazing experience for every rider</b>	<b>Look after the locals</b>	<b>Work together</b>
RELATED WORKSTREAMS	1.1 Develop Biking Campaign Strategy	2.1 Create a clear (digital) pathway through the five stages of travel.	3.1 Ensure trail offering matches demand.	4.1 Empower local businesses to create or expand their biking offering.	5.1 Establish a Queenstown biking industry association to improve communication and collaboration.
1.2 Improve destination credentials via accreditation.	2.2 Establish wayfinding signage for biking experience throughout region.	3.2 Establish a greater choice of paid-for experiences, products, and support services.	4.2 Support existing biking businesses to diversify their offering outside of tourism.	5.2 Establish a biking market steering group to inform key decisions and align strategies	
1.3 Leverage 'Passion First' travel trade.	2.3 Investigate feasibility and options for digital App(s) to guide and optimise biking experience.	3.3 Improve 'bike friendliness' of Queenstown with better facilities and services.	4.3 Identify opportunities for biking community (locals + visitors) to contribute to local conservation initiatives.		
1.4 Incorporate Biking as a key component of a refreshed events approach.		3.4 Ensure connectivity of trail network is optimised whenever possible.	4.4 Ensure appropriate acknowledgement of mana whenua, te reo, tikanga and te ao Māori.		
		3.5 Secure adequate funding for ongoing development and maintenance of trails.	4.5 Develop the social license and community sentiment of bike-tourism in Queenstown.		

## OPPORTUNITIES & CHALLENGES

### Aspiration 1: Grow our rep, and our biking visitors

Biking visitor numbers sustainably grow as Queenstown becomes THE place to bike in the Southern Hemisphere.



### Opportunities

#### • Dedicated Marketing + PR Activity

- Develop a biking-specific positioning and promotional campaign to attract visitors
- Leverage elite and influential international mountain bike riders that frequent Queenstown to promote it as a top biking destination (e.g., Carson Storch)
- Partner with influential brands/influencers for creation and distribution of Queenstown biking content (e.g., Pink Bike)
- Leverage the popularity and top-level status of the Queenstown Trail as New Zealand's most popular 'Great Ride'
- Partner with neighbouring regions to leverage enhanced interconnectivity and strong 'regional' biking offer that Queenstown acts as a 'gateway' for (Wānaka/Central Otago)
- Focus promotion on inclusive participation (women/kids/families/seniors)
- Develop content that showcases the whole picture (great riding, friendly locals, cool place to be)
- Ensure biking content is included as a key component of wider destination marketing activity
- Establish a definitive method(s) of sharing experience with other potential biking visitors.

#### • Improve Credentials

- Seek accreditation as a leading international biking destination to establish relationships with key industry players, increase exposure and pave the way for the hosting of events (e.g., IMBA 'Ride Centre' Gold).

#### • Leverage 'Passion First' Travel-trade

- Identify and leverage international travel-trade partners specific to 'Passion First' biking market (e.g., Adventurers Travel Co, Bicycle Adventures).

#### • Enhanced Events Offering

- Attract globally recognised biking events to increase exposure (e.g., Union Cycliste Internationale and Enduro World Series 'Class 1' events, CrankWorx World Tour/Summer Series, or Global Cycle Festival)
- Establish an umbrella event-brand (e.g., 'Queenstown BikeFest') to increase exposure and provide a trigger for visitation
- Specialist kids' events (if the kids ride, they will bring the adults)
- Women-focused events
- Help to build local capability and available resources within the local events sector.

## Challenges

- **Strong Competition**
  - » Competitive international biking offers led by Whistler, Squamish, Colorado etc.
  - » Australian biking locations improving their positioning and reputation (Tasmania, Victoria)
  - » Strong domestic competition with Rotorua, Nelson, Wellington, and Christchurch all presenting strong biking offers.
- **Number + Diversity of Stakeholders**
  - » The large and diverse number of operators, groups and related stakeholders involved in the wider Queenstown biking offering may prove difficult to pull together into a collaborative and synergistic marketing approach
  - » This diverse stakeholder group may make it difficult to please everyone when it comes to promotional positioning and activity.
- **Lack of Insights**
  - » There is a lack of quality data, insights or statistics surrounding the 'Passion First' sub-market, particularly for the New Zealand domestic market. This creates difficulties in establishing an accurate sense of this market's value or preferences.
  - » Market research, data, and resulting insights are often subject to significant time-lags, making it challenging to keep up with current or upcoming market trends.
- **Managing visitor expectations**
  - » Whilst there is an opportunity to leverage the 'halo' effect that Queenstown's reputation within the global mountain bike sector creates, care must be taken not to set unrealistic expectations in terms of the actual experience available to the majority of biking visitors.
- **Requirements for Events**
  - » Accessing funding and gaining the appropriate consents, permits and resources to develop and host a successful event requires significant effort and specific knowledge
  - » Limited capacity within QLDC and Destination Queenstown to help facilitate the development of events.
- **Covid-19**
  - » Ongoing uncertainty regarding ability to travel internationally restricting potential visitor market to within New Zealand and Australia in the short to mid-term.
- **Constraints**
  - » Finite marketing budget available which is small compared to some competing biking destinations

## Aspiration 2: Make it easy and awesome

Everything about planning booking and experiencing a biking holiday in Queenstown is made easy and optimised.



### Opportunities

#### • Information + Booking (pre-arrival)

- Establish a definitive ‘how to’ digital information hub containing everything needed for potential visitors to learn about and book a quality Queenstown biking experience
- Opportunity to expand/improve the biking information already contained on Queenstownnz.co.nz
- Encourage the local biking industry to align their content and activity with this site/app to avoid unnecessary competition and information spread
- Provide biking package deals (like ski) to appeal to wholesale travel channels and ease the booking process for visitors.
- Utilise smart booking software to provide direct offers to both consumers and trade.

#### • Information + Wayfinding (during visit)

- Create a sense of arrival/welcome for biking visitors (opportunity for wayfinding ‘hub and spoke’)
- Utilise existing information and booking channels and facilities to guide the biking experience (e.g., DoC and information centres)
- Ensure strong references to online information are presented throughout Queenstown offering to help guide and optimise experience
- Establish accurate and consistent signage to communicate important information (grade/difficulty, track etiquette, interesting information etc)

- Utilise these same communication tools (and/or website or App) to promote how biking visitors are/can contribute positively to the Queenstown community during their visit.

#### • Biking App

- Look to utilise or incorporate the QMTBC members’ app for provision of information, access to members’ benefits etc
- Potential to link with Bike Wānaka app
- Pull in existing information from other relevant apps (Great Rides, Trailforks)
- Opportunity to encourage/incentivise the creation and sharing of user generated content via the website/app.

### Challenges

#### • Curation of Content

- » Inconsistencies with trail grading and terminology makes it difficult to ensure an accurate expectation of the trail’s nature and technicality is communicated
- » Providing up-to-date and accurate information when promoting or providing guidance for trails is often hampered by their changeable nature in terms of status or condition

- » Packaging of products can sometimes prove difficult in terms of the booking process itself, with operators using different booking platforms etc.
- **Managing Track Use**
  - » Secret trails– locals want them kept secret, council and visitors want to provide more information to ensure safety
  - » Visitors can often overestimate their ability compared to the nature or technicality required of the trail, increasing the likelihood of an accident and injury occurring.
  - » The decentralised nature of the Queenstown biking product means it is a challenge to guide visitors through the experience and ensure that their ability and requirements match the experience served to them.
- **Resourcing & Funding**
  - » The multitude of trails available combined with the wide spectrum of potential users will require significant resource for information gathering and curation of content
  - » A website may prove the cheaper option, with mobile apps typically expensive to create and requiring additional funding to promote their use.
- **Constraints**
  - » Limited budget to develop and promote a guided digital experience.



### Aspiration 3: Ensure an amazing experience for every rider

Queenstown is widely recognised as a ‘bike town’, offering a welcoming, and hugely rewarding experience for all biking enthusiasts.



#### Opportunities

- **Improved Trail Offering**
  - Plug any perceived gaps in the types or grades of trails available
  - Establish kid-friendly trails and parks
  - Leverage new/upcoming trails and enhanced interconnectivity:
    - » Queenstown Trail expansion (beginning Summer 2021/22)
    - » Coronet Loop (Grade 3) - due for completion summer 2022
    - » Kawarau Gorge Trail linking Queenstown to Central Otago
    - » Glenorchy Trails development and Te Araroa Trail
    - » Additional trails set to be developed by QMTBC, COQTNT, SETT, QTT, GTT
  - Opportunity to develop the Coronet area (extensive tree felling)
  - Ensure new trails and routes are constantly developed
- **Develop New Experiences + Products**
  - Establish a greater choice of paid-for experiences and biking-specific products/services (particularly for more technical trail types)
  - Investigate new or trending trail types and riding styles
  - Coaching and development as an experience offer
  - Establish quality secondary services around biking trails/hubs
- **Facilities + Services**
  - Enhance the sense of welcome and ‘bike-friendliness’ in key areas.
  - Introduce bike-related facilities in key areas around Queenstown
  - Improve biking related provisions throughout the visitor experience.

#### • **Connectivity + Infrastructure**

- Leverage the Whakatipu Active Travel Network, and ‘Way to Go’ initiatives to establish safe and enjoyable linkage paths and provide a greater sense of cohesion across the network (e.g., town to 7-mile)
- Reduce the current over-reliance on ‘Fly – Drive’ by developing a bike link from the airport, with accompanying services (e.g., luggage transfers to accommodation).

#### • **Secure Additional Funding**

- Develop a user-pays system to fund ongoing trail development and maintenance
- Investigate the introduction of an operator levy to fund ongoing trail development/maintenance and aid lobbying efforts
- Look to leverage aligned corporate sponsors and biking brands
- Ensure potential funding sources are identified and leveraged when appropriate (e.g., charitable trusts, grants, Rotary/Lions clubs).

#### Challenges

#### • **Sustainable Management/Funding**

- » QLDC are likely to be hesitant to take on ownership or management of more trails due to the financial and resource burden involved
- » Current volatile tourism context and question marks over ability to achieve critical mass makes it difficult for businesses to start-up/scale up to grow surrounding experiences, products, and services.

- **Access to Land**

- » In its current form, the Department of Conservation’s (DoC) *Conservation Management Strategy* (CMS) is widely viewed as hamstringing potential trail development on public conservation land. It should be noted that DoC themselves are supportive of biking, with the CMS currently in review.
- » Much of the rideable land on the hills and mountains around the Queenstown basin is located on leasehold land, which requires gaining permission for trails from the lease holder
- » There is often the need to address multiple stakeholders when looking to develop bike trails (e.g., DoC, mana whenua, local government, crown land (managed by Toitū Whenua – Land Information New Zealand), private landowners, and conservation groups.)

- **Health & Safety**

- » There is a lack of systems, protocols, and resources in place to mitigate and/or manage emergency situations across much of the trail network.
- » The growth in popularity of e-bikes, particularly amongst older demographics, has resulted in easier access to riding, which makes management of emergency situations challenging.

- **Compliance & Liability**

- » High cost and long lead-time involved in securing of required consents seen as a major deterrent in establishing new products or experiences
- » High duty of care and associated health & safety, and liability requirements also seen as a major deterrent to potential product development.

- **Ongoing Access + Maintenance of Trails**

- » Development and maintenance of trails is highly reliant on volunteers providing a labour pool. Volunteer burn-out is often a resulting issue
- » Many trails located within forestry plantations, which causes issues when these lots need to be harvested
- » Wilding pine removal has potential to cause damage to trails, remove the ‘all-weather’ nature of the network and cause erosion issues.

- **Lack of Data/Insights**

- » There is a lack of insights with regards to how the Queenstown biking offer is being used or received, with no recent surveys or definitive feedback methods ascertaining the satisfaction of users, and any gaps or inferior qualities of the trail offering

- **Managing Trail Use**

- » As biking continues to grow in popularity, more trails are needed to spread riders out to allow a sense of solitude and avoid overuse
- » The trails are often used by other outdoor enthusiasts (walkers and horse-riding), which can cause potential conflicts with bike riders.

- **Speed of Development**

- » Residential sub-division development growing too fast to get ahead of in the planning of trail connectivity and pathways.

- **Constraints**

- » Development and ongoing maintenance costs of trails are significant
- » Concerns over sustainability of current funding sources (e.g., MBIE for the Great Rides).
- » Biking infrastructure, facilities or amenities cannot place a significant financial burden on the Queenstown ratepayer – these need to be at least partially self-funded (e.g., ‘Locky Docks’ bike stands)



## Aspiration 4: Look after the locals

Biking is celebrated for its positive contribution to the Queenstown community.



### Opportunities

#### • Economic Development + Diversification

- Development of further primary and secondary supporting services for trails (e.g., bike rentals, shuttles, accommodation, F&B)
- Development of coaching/training industry (e.g., women/kids coaching clinics + riding academy's, elite-level training facilities)
- Industry upskilling and development of career pathways (guiding/coaching/track building/bike mechanic)
- Development of tech companies around biking (hardware/technique + coaching tools/safety enhancements)
- Exportation of IP and technology (e.g., track building)
- Enhanced recreational opportunities assists with talent attraction.
- Funding of community initiatives through a 'user-pays' system.

#### • Environmental Protection/Regeneration

- Opportunity to establish conservation initiatives and projects throughout trail network (e.g., predator trapping, native regeneration)
- User-pays system could generate funds that are partially reinvested into relevant regenerative projects
- Trail users could be given the opportunity to volunteer their time for related regenerative projects
- Biking industry members could subsidise their earnings working for relevant regenerative projects through the 'Jobs for Nature' fund
- Promote local conservation initiatives to biking community.

#### • Social Wellbeing

- Development of additional services to support new trails/parks/hubs (also available to locals)
- Development of additional biking-related events to further improve vibrancy
- Reduce the barriers of entry/progression within biking for locals (e.g., subsidised bikes, memberships, coaching)
- Creation of an improved network of interconnected trails to provide an easier, more accessible, and safer recreational, commuter and school-run biking experience for the local community
- Reduce the reliance on cars, mitigating issues related to traffic congestion and parking infrastructure
- Educate Queenstown residents on the benefits the biking sector (and resulting visitors) provide to their community.

#### • Celebration of Culture

- Share and celebrate Queenstown community's history, stories, and achievements
- Share both Māori and pioneer stories through landmarks experienced along the biking journey
- Assist with increased use of Te Reo Māori (language) and understanding of tikanga (principles) and Te Ao Māori (Māori world view).

## Challenges

- **Appropriate Consultation with Mana Whenua**
  - » Appropriate engagement, consultation and partnership with both Kāi Tahu as the overarching iwi, and the 7x local rūnaka in the Queenstown area can be challenging given the limited number of iwi representatives living in the Queenstown region, and the heavy demand on these representatives for consultation and engagement
  - » Ensuring the telling of appropriate and accurate mana whenua stories is critical, with the necessary decisions surrounding the sharing of such stories often being a consuming process needed to be undertaken internally by iwi.
- **Differences in Trail Usage/Requirements**
  - » The trails are often used by other outdoor enthusiasts (e.g., as walkways and bridle paths), which can cause potential conflicts with, and a negative perception of, riders. There is a need to balance number of visitors using trails with quality of experience for locals
  - » Roads or dedicated bike lanes are often a faster commuting option when compared to trails but are inferior options when it comes to recreational use.
- **Feasibility of Investment**
  - » Current volatile tourism context and question marks over ability to achieve critical mass in terms of biking visitor numbers makes it difficult for businesses to start-up/scale up to increase surrounding experiences, products, and services (chicken vs egg).
- **Capability Building + Resources**
  - » Existing/potential biking industry members may include a high proportion of 'lifestyle first' operators, with some of the more business-oriented requirements outside of key areas of focus.
- **Constraints**
  - » Economic development resourcing: QLDC has a small unit of two people within the economic development team, with a main priority being the diversification of the Queenstown economy to reduce the reliance on tourism.

## Aspiration 5: Work together

The Queenstown biking community is cohesive and collaborative.



### OPPORTUNITIES

- **Cohesive + Collaborative Approach**
  - The identification of common aspirations, opportunities, challenges, and strategic priorities present throughout the Queenstown biking sector can provide an opportunity to become more collaborative and synergistic in the collective approach.
- **Community Involvement**
  - Community groups and associated organisations/businesses should be included whenever appropriate. Examples include ‘Friends’ of the various Trail Trusts, resident groups such as Kelvin Peninsula Community Association, Queenstown Pedallers, Gibbston Wineries, some pastoral stations, Lions and Rotary Clubs and businesses such as Skyline Enterprises
- **Working Groups**
  - The creation of an industry association (e.g., ‘Bike Queenstown’) would allow better communication and collaboration between members and stakeholders of the wider Queenstown biking sector and provide a stronger voice and point of advocacy for the sector
  - A biking market steering group, made up of representatives from key agencies (e.g., Biking Association/QLDC/QRC/DQ/DoC/Kāi Tahu/Waka Kotahi) would inform key decisions surrounding aligned or related strategies and projects, and ensure that the sector’s best interests are represented.

### CHALLENGES

- **Number + Diversity of Stakeholders**
  - » The large and diverse number of operators, groups and related stakeholders involved in the wider Queenstown biking offering may prove difficult to pull together into a collaborative and synergistic approach.
- **Constraints**
  - » Lack of time: Key stakeholders are likely to be busy with their primary roles, with limited capacity to engage in industry associations or steering groups.



# Benefits to Queenstown

Aside from great riding, achieving the above vision and aspirations would provide the opportunity to bring many additional benefits to the Queenstown community.

## ENVIRONMENTAL BENEFITS

### Improved Access to Nature

- Bike trails provide easier physical access points into the natural environment, whether it be for recreation or conservation purposes
- Better access brings greater opportunity for increased conservation outcomes (e.g., wilding pine removal, predator trapping, native plant regeneration).

### Creation of Green Corridors

- Trail access creates the opportunity to regenerate surrounding land
- Protects surrounding land from adverse development.

### Low-impact Transport

- More use of bikes means less use of cars, lowering carbon emissions
- Less noise pollution
- Supports enhanced biodiversity
- Lower impact travel method means less stress placed on transport infrastructure.

### Support Regenerative Projects

- User-pays system could generate funds that are partially reinvested into relevant regenerative projects
- Trail users provided the opportunity to volunteer their time for related regenerative projects
- Members of the biking community could subsidise their earnings working for regenerative projects through the 'Jobs for Nature' fund.

### Inspiring Behavioural Change

- Increased interaction with nature increases awareness and support for environmental ideals
- Opportunity to promote local conservation initiatives to biking community.

## ECONOMIC

### Increased Visitor Spend

- Biking visitors generally have a high disposable income and a large spend footprint during their stay, benefitting a wide range of local businesses
- Strong trail offering and ability to progress means biking visitors are likely to make a return visit at some point in the future, increasing their financial value to the region further.

### Spend Dispersal

- With trails spread throughout the region, biking allows visitors to disperse their time and visitor spend, benefitting a wide range of local businesses and communities
- The many different styles, skill-levels and preferences of the biking visitor means their spend has a greater spread throughout the local economy.

### Economic Development

- Developing the surrounding biking industry and supporting services would provide opportunity for new local businesses to become established or attract existing businesses to the area
- Developing local expertise and a favourable international reputation increases ability to export related intellectual property and/or technology
- Encourages creation of both direct and indirect (secondary) employment opportunities
- Surrounding industry provides increased upskilling and career development opportunities/pathways
- Provision of enhanced recreational opportunities helps to attract highly skilled and sought-after people to come to live and work in the Queenstown area.

## Supporting the Local Community

- Initiating a 'user-pays' system for visitors would provide significant funding to aid the local community, either with trail development/maintenance or other community initiatives
- This same visitor contribution could subsidise the membership fees or expenses of local club or community members.

## SOCIAL

### Health + Wellbeing

- Proven physical benefits of biking include increased cardiovascular fitness, improved joint mobility, and improving prevention or management of disease
- Proven mental benefits of biking include the release of mood-improving endorphins, decreased stress levels, improved sleeping patterns and productivity
- The socially active biking community provides a sense of belonging and camaraderie for those involved
- As a low-impact and relatively easy sport, biking is an activity that family units can enjoy together.

### Improved Services + Vibrancy

- Increased recognition and support for the value the biking industry brings to the Queenstown community would likely result in further trail development and related improvements, which would benefit local riders
- As the Queenstown biking offering becomes more established and popular, trails, bike-parks and other 'hubs' are likely to require an increased provision of support-services, which will also be available to locals
- The growth in popularity of biking would likely result in an increasing number of related events being hosted within Queenstown, further improving the entertainment opportunities and vibrancy of the area.

### **Inspiration, Access + Progression**

- If the Queenstown biking community are enabled to foster and support members into becoming successful and well-known riders, this will provide a source of inspiration to others within the Queenstown community and encourage them to give biking a try
- A well subscribed and supported local biking community would have the ability to reduce the barriers of entry to the sport for other locals
- Access to high-quality riders and support services (e.g., coaching) would enhance development opportunities for local riders, and provide visible paths of progression.

### **Improved Connectivity + Safety**

- An improved network of interconnected trails would provide an easier, more accessible, and safer recreational, commuter and school-run biking experience for the local community
- This improved connectivity would also encourage visitors to use their bikes more when exploring the wider Queenstown area
- The resulting increase in bike use would reduce the reliance on cars, mitigating issues related to traffic congestion and parking infrastructure.

### **Civic Pride + Social License**

- Given the ‘adventurous’ reputation Queenstown has as a place to both live and visit, biking visitors are more likely to share a similar mindset and values to residents, increasing social license of tourism within the Queenstown community
- Biking is a positive thing to have the Queenstown identity aligned with. The Queenstown community is likely to prefer their hometown be well-known for a pastime that is both healthy and environmentally responsible
- The sustainable development of Queenstown as a biking destination offers the opportunity to educate Queenstown residents on the benefits the resulting visitors provide to their community.

## **CULTURAL**

### **Celebrate the Local Biking Culture/Community**

- Provides an opportunity for the Queenstown biking community to share and celebrate their history, stories, and achievements, and how they are making a positive influence within their wider community.

### **Interaction of Cultures**

- Establishing a local biking community that provides a warm welcome to visitors enables the positive interaction of like-minded people from around the world, increasing understanding and acceptance of different cultures, ideas, and values
- Welcoming this wide and varied visitor type enables a diversity in the goods and services offered to them during their stay, helping to create an international, diverse, and vibrant place to live or visit.

### **Sharing Local History + Culture**

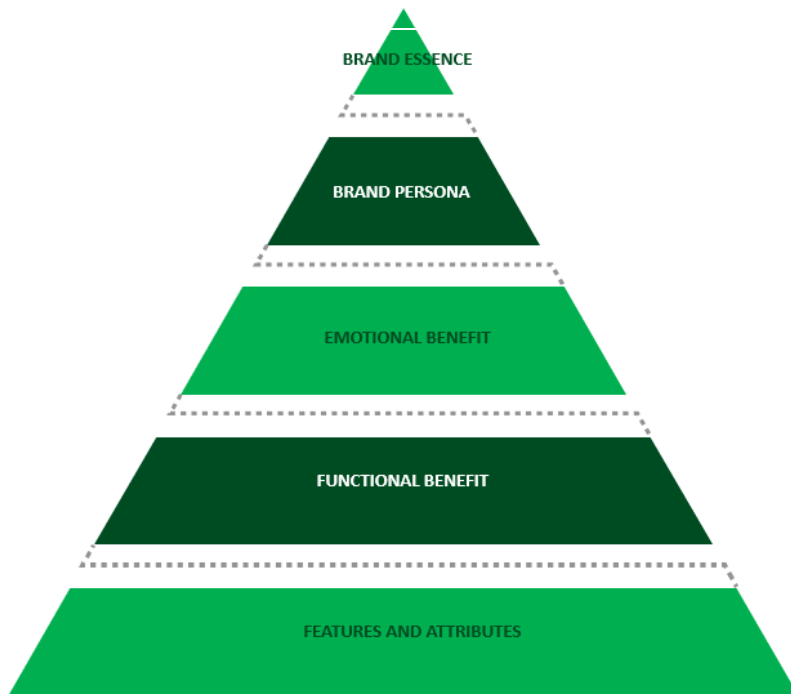
- Biking provides an opportunity to share both Māori and pioneer stories through landmarks experienced along the biking journey. This helps to build understanding and appreciation for both Queenstown and New Zealand’s unique history and culture.





# Positioning Queenstown for Biking

The following positioning pyramid attempts to succinctly define the Queenstown biking opportunity, leveraging the region's main strengths and appeals across both the 'Holiday First' and 'Passion First' visitor segments, and the varying styles of riding.



## BRAND ESSENCE

*Epic made easy.*

- 'Epic' paints a visual picture of the landscape on offer as well as the positive biking experience itself
- 'Easy' speaks across different biking styles, trail types and visitor segments.

## BRAND PERSONA

I want to step things up a notch. I've been in the outdoors and on a bike often enough, but this is Queenstown! A place of epic landscapes and the home of adventure. This is a chance to seek experiences which will push me outside of my norm, but which will also bring incredible rewards.

## EMOTIONAL BENEFITS

- **Escape** (free of their everyday worries)
- **Confidence** (safe and confident to step outside their comfort zone)
- **Joy** (pure happiness)
- **Connection** (welcomed and included)
- **Accomplishment** (sense of achievement)
- **Natural** (sense of reconnection with nature).

## FUNCTIONAL BENEFITS

- **Back country made easy** (Queenstown gives all visitors the opportunity to be immersed in unique and visually stunning scenery that in other places may not be accessible)
- **A great ride for everyone** (Queenstown offers a vast variety of quality biking trails which appeal to a wide range of biking visitors, regardless of riding style or skill-level)
- **Embracing community + culture** (Queenstown has a passionate local biking community that visitors are warmly welcomed into)
- **Off-bike experience** (Queenstown has a well-regarded wider visitor offering across multiple activities, attractions, hospitality offerings and events).

## FEATURES & ATTRIBUTES

- Diversity & quality of trail offering
- Climate & location
- Scenery & landscape
- Accessibility
- Passionate biking community & culture
- Trail experiences & services (Great Rides)
- Wider visitor experience & reputation (Contribution to Community)

## Recommended Approach

The following outlines the workstreams and associated actions recommended to achieve the listed aspirations, by optimising the opportunities and minimising the challenges for each.





## 1. Grow our rep, and our biking visitors

Biking visitor numbers sustainably grow as Queenstown becomes THE place to bike in the Southern Hemisphere.

Queenstown is widely recognised as a place where all biking enthusiasts, from absolute beginners to the best athletes in the world and across riding styles, come together to participate and rejoice in their shared passion.

### Workstreams

- Develop Biking Campaign Strategy
- Improve destination credentials via accreditation
- Leverage 'Passion First' travel trade
- Incorporate Biking as a key component of a refreshed events approach

### Opportunities

- Dedicated Marketing Activity
- Improve Credentials
- Leverage 'Passion First' travel-trade
- Enhanced Events Offering.

### Challenges

- Strong Competition
- Number + Diversity of Stakeholders
- Lack of Data/Insights
- Managing visitor expectations
- Requirements for Events
- COVID-19
- Constraints (limited marketing budget)

### Related Strategies & Projects

- DQ wider positioning and campaign strategies
- DQ Consumer Segment Strategies
- QLDC Events Strategy
- Queenstown Trails Trust Strategic Plan
- Queenstown Mountain Bike Club 2018 - 2028 Strategic Plan
- Queenstown Mountain Bike Club 'Economic Impact of Mountain Biking in Queenstown' – 2017
- Tourism New Zealand Special Interest Group – 'Cycling and Mountain Biking'.

WORKSTREAMS (Strategic Priorities)	KEY ACTIONS	FURTHER FEEDBACK, SUGGESTIONS & IDEAS
<b>1.1. Develop Biking Campaign Strategy</b>	<ul style="list-style-type: none"> <li>Gain further insights into 'Passion First' market (focus on domestic + Trans-Tasman markets).</li> <li>Finalise brand positioning/approach.</li> <li>Identify and approach key promotional partners to work with and leverage.</li> <li>Develop biking content to communicate strengths.</li> <li>Design and execute campaign(s)</li> <li>Promote/incentivise sharing of user-generated content.</li> <li>Establish measures of success.</li> <li>Incorporate biking content in wider 'Holiday First' activity.</li> </ul>	<ul style="list-style-type: none"> <li>QTT is potentially looking to refresh their Strategic plan.</li> <li>Insights into the 'Passion First' market (particularly within the NZ domestic travel context) needs to be refreshed and improved.</li> <li>There is a distinct lack of up-to-date strategic planning evident (or at least publicly available) for either the NZ Cycle Trail, or TNZ's '<i>cycling and mountain biking</i>' special interest category.</li> <li>Opportunity to partner with neighbouring regions with strong bike offering that Queenstown acts as a 'gateway' to (Wānaka/Central Otago/Fiordland/southland).</li> <li>Opportunity to leverage globally recognised influencers (e.g., IMBA, Redbull, GoPro, PinkBike), and related New Zealand brands (e.g., iLABB, Torpedo 7) to help with access to influencers, and creation and distribution of content.</li> <li>Content should be 'organic' (created in collaboration with local biking industry) and show the whole picture (biking + 'cool place to be') e.g., visitor involvement with 'Wednesday Night Digs'.</li> <li>Consider partnering with northern-hemisphere equivalent (e.g., Whistler) to cross-promote in their off season.</li> </ul>
<b>1.2. Improve destination credentials via accreditation</b>	<ul style="list-style-type: none"> <li>Identify and achieve appropriate accreditation.</li> </ul>	<ul style="list-style-type: none"> <li>Seek IMBA 'Ride Centre' Gold accreditation in the first instance (Rotorua + Nelson have already achieved).</li> <li>Retain Great Ride status (accredited already)</li> </ul>
<b>1.3. Leverage 'Passion First' travel trade</b>	<ul style="list-style-type: none"> <li>Identify and leverage international travel-trade partners specific to 'Passion First' biking market.</li> </ul>	<ul style="list-style-type: none"> <li>Clearly this workstream will become more important as international travel opens post COVID-19.</li> </ul>
<b>1.4. Incorporate Biking as a key component of a refreshed events approach</b>	<ul style="list-style-type: none"> <li>Refresh the wider QLDC Events Strategy to align with tourism context and build local capability.</li> </ul>	



## 2. Make it easy, and awesome

Everything about planning, booking, and experiencing a biking holiday in Queenstown is made easy and optimised.

From the moment a biking enthusiast starts planning a Queenstown biking experience, to the moment they leave, everything has been made as easy, accommodating, and enjoyable as possible.

### Workstreams

- Create a clear (digital) pathway through the five stages of travel.
- Establish wayfinding signage for biking experience throughout region.
- Investigate feasibility and options for digital App(s) to guide and optimise biking experience.

### Opportunities

- Information + booking (pre-arrival)
- Information + Wayfinding (during visit)
- Biking App
- User generated content.

### Challenges

- Curation of content
- Managing track use
- Resourcing & Funding
- Constraints (limited development/marketing budget).

### Related Strategies & Projects

- DQ wider positioning and campaign strategies
- Queenstown Trails Trust Strategic Plan
- Queenstown Mountain Bike Club 2018 - 2028 Strategic Plan.

WORKSTREAMS (Strategic Priorities)	KEY ACTIONS	FURTHER FEEDBACK, SUGGESTIONS & IDEAS
<b>2.1 – Create a clear (digital) pathway through the five stages of travel</b>	<ul style="list-style-type: none"> <li>• Establish a definitive online information hub.</li> <li>• Collate relevant content.</li> <li>• Facilitate the creation/offer of package deals.</li> <li>• Engage and include biking travel trade.</li> <li>• Incorporate the ability to capture and share user generated content.</li> <li>• Incorporate content surrounding how biking visitors are/can contribute positively to the Queenstown community.</li> </ul>	<ul style="list-style-type: none"> <li>• Online hub most likely to be Queenstownnz.co.nz</li> </ul>
<b>2.2 – Establish wayfinding signage for biking experience throughout region</b>	<ul style="list-style-type: none"> <li>• Ensure adequate signage/path markings and information systems surrounding trail type, difficulty, and trail etiquette are in place.</li> <li>• Investigate extension of signage off-trail to help wayfinding.</li> <li>• Link signage with digital information hub.</li> </ul>	<ul style="list-style-type: none"> <li>• QLDC are currently in the process of a ‘<i>Queenstown Pedestrian Wayfinding</i>’ project which will encompass wayfinding structures and signs. While this work will most likely be completed prior to action being able to take place from a biking perspective, it should be kept in mind and aligned to/leveraged where suitable.</li> </ul>
<b>2.3 – Investigate feasibility and options for digital App(s) to guide and optimise biking experience</b>	<ul style="list-style-type: none"> <li>• Investigate success/return on investment of Bike Wānaka app.</li> <li>• Investigate options for either extension of QMTBC app or pulling in content from QMTBC member’s app/Great Rides App/Trail Forks/other suitable content.</li> </ul>	<ul style="list-style-type: none"> <li>• Additional uses for a digital App could include:</li> <li>• Promotion of special deals for supporting businesses.</li> <li>• Education around trail safety and etiquette.</li> </ul>
<p><b>Notes: Further opportunities for optimising the biking experience itself are included within Aspiration 3 – ‘<i>Ensure an amazing experience for every rider</i>’, below</b></p>		



### 3. Ensure an amazing experience for every rider

Queenstown is widely recognised as a ‘bike town’, offering a welcoming, safe, and hugely rewarding experience for all biking enthusiasts.

Queenstown offers a high-quality, rewarding biking experience for everyone, regardless of their preferred trail type, riding style, skill, or fitness level.

#### Workstreams

- Ensure trail offering matches demand
- Establish a greater choice of paid-for experiences, products, and support services
- Improve ‘bike friendliness’ of Queenstown with better facilities and services
- Ensure connectivity of trail network is optimised whenever possible
- Secure adequate funding for ongoing development and maintenance of trails
- Protect existing trails

#### Opportunities

- Improved Trail Offering
- Develop new paid-for experiences + products surrounding the trails
- Facilities + Services
- Connectivity + Infrastructure
- Secure Additional Funding.

#### Challenges

- Sustainable Management/Funding
- Access to land
- Health & Safety
- Compliance
- Ongoing Access + Maintenance of Trails
- Lack of data/insights
- Managing Trail Use
- Speed of development
- Constraints (funding and management)

#### Related Strategies & Projects

- QLDC Vision Beyond 2050
- Queenstown Trails Trust Strategic Plan
- Glenorchy Trails Trust 10 Year Strategy
- Queenstown Mountain Bike Club 2018 - 2028 Strategic Plan
- Destination Management Plan - Regenerative Tourism By 2030
- QLDC Diversification Strategy
- Wakatipu Way to Go (Waka Kotahi, QLDC, ORC)
- QLDC District Plan & QLDC Spatial Plan

WORKSTREAMS (Strategic Priorities)	KEY ACTIONS	FURTHER FEEDBACK, SUGGESTIONS & IDEAS
<b>3.1 – Ensure trail offering matches demand</b>	<ul style="list-style-type: none"> <li>• Ensure ongoing development/improvement of trails.</li> <li>• Establish definitive method(s) of customer feedback and capture of satisfaction levels.</li> <li>• Plug any perceived gaps in the types or grades of trails available.</li> </ul>	<ul style="list-style-type: none"> <li>• Currently perceived gaps in: Grades 2-3, Cross-country, e-bike specific trails, BMX track, a true 'ride-in, ride-out' multi-day trail).</li> <li>• There are several trails either currently or soon to be developed which will go some way to achieving this (Coronet Loop/Kawarau Gorge).</li> </ul>
<b>3.2 - Establish a greater choice of paid-for experiences, products, and support services</b>	<ul style="list-style-type: none"> <li>• Investigate new or trending trail types and riding styles to leverage.</li> <li>• Identify opportunities for development of support services around trails.</li> </ul>	<ul style="list-style-type: none"> <li>• Examples: Gravel riding (one of the fastest growing riding styles in the past few years), fat-tyre riding on snow, indoor venues.</li> <li>• Support services adding to the biking experience e.g. 'CoffeeAfloat' on Lake Dunstan.</li> </ul>
<b>3.3 – Improve 'bike friendliness' of Queenstown with better facilities and services</b>	<ul style="list-style-type: none"> <li>• Introduce bike-related amenities in key areas around Queenstown.</li> <li>• Investigate the desire for, and pros and cons of establishing a physical biking 'hub' in town.</li> <li>• Education of Accommodation providers around biking and the amenities they require</li> <li>• Lobby for better facilitation of biking customers throughout wider Queenstown visitor experience (e.g. public transport).</li> </ul>	<ul style="list-style-type: none"> <li>• Examples of facilities/amenities: lockable bike stands and storage, e-bike charging stations, community rental bikes, showers, water refill stations bike cleaning and maintenance facilities.</li> <li>• Examples of better facilitation of biking customers throughout wider visitor experience: more bike racks for rental cars and public transport options, delivery of luggage from airport to accommodation, bike storage and facilities at accommodation.</li> </ul>
<b>3.4 – Ensure connectivity of trail network is optimised whenever possible</b>	<ul style="list-style-type: none"> <li>• Connectivity of key biking areas</li> <li>• Ensure needs and desires of biking community are included in 'Way to Go' and Whakatipu Active Travel Network initiatives.</li> </ul>	<ul style="list-style-type: none"> <li>• This is a key component of several related strategies and projects, most notably the Wakatipu Way to Go partnership with QLDC, Waka Kotahi, and Otago Regional Council.</li> </ul>
<b>3.5 – Secure adequate funding for ongoing development and maintenance of trails</b>	<ul style="list-style-type: none"> <li>• Investigate options for user-pays and/or operator levy system to fund trail development and maintenance.</li> <li>• Leverage aligned corporate sponsors.</li> <li>• Identify and leverage additional funding channels.</li> <li>• Investigate options for further recruitment and rewarding of volunteers.</li> </ul>	<ul style="list-style-type: none"> <li>• If well executed and received, additional revenue collected could be used to help fund further bike-related community or conservation initiatives or programmes.</li> </ul>
<b>3.6 – Protect existing trails</b>	<ul style="list-style-type: none"> <li>• Ensure wilding pine removal minimises impact on riding options.</li> <li>• Ensure logging minimises impact on riding options.</li> </ul>	
<ul style="list-style-type: none"> <li>- Further assistance to businesses in the form of enablement, capability building, and compliance is covered In Aspiration 4 – 'Look after the locals' below.</li> <li>- Access to land is covered further in Aspiration 5 – 'Work Together' below.</li> </ul>		





#### 4. Look after the locals

Biking is celebrated for its positive contribution to the Queenstown community.

The ongoing development of the local biking sector brings numerous benefits widely felt throughout the Queenstown community, resulting in both local and visiting riders being warmly regarded, and feeling good about the positive contribution they are making.

#### Workstreams

- Empower local businesses to create or expand their biking offering.
- Support existing biking businesses to diversify their offering outside of tourism
- Identify opportunities for biking community to contribute to local conservation initiatives
- Ensure appropriate acknowledgement and inclusion/sharing of Māori culture
- Develop the social license and community sentiment of bike-tourism in Queenstown

#### Opportunities

- Economic Development + Diversification
- Environmental protection/regeneration
- Social Wellbeing
- Celebration of Culture.

#### Challenges

- Appropriate consultation with mana whenua
- Economic development resourcing
- Differences in trail usage/requirements
- Feasibility of investment
- Capability building + resources
- Constraints (economic development resourcing)

#### Related Strategies & Projects

- Destination Management Plan - Regenerative Tourism By 2030
- QLDC Diversification Strategy
- QLDC Climate Action Plan 2019-22.

WORKSTREAMS (Strategic Priorities)	KEY ACTIONS	FURTHER FEEDBACK, SUGGESTIONS & IDEAS
<b>4.1 – Empower local businesses to create or expand their biking offering</b>	<ul style="list-style-type: none"> <li>• Provide data, tools, and resources to help determine feasibility of biking related product creation or extensions.</li> <li>• Collaborate with business support and capability building programmes to provide advisory services where needed.</li> </ul>	<ul style="list-style-type: none"> <li>• Examples of paid-for products and services: guided rides, shuttles, bike rentals, accommodation, e-bike battery rentals + charging, coaching).</li> <li>• A full gaps analysis would be valuable in providing further insights.</li> <li>• Business Support programmes available include the Regional Business Partner (RBP) programme and MBIE Tourism Communities: Support, Recovery and Re-set Plan. Both are administered by Otago Chamber of Commerce, with the ‘Lead Entity’ for Queenstown being QLDC.</li> <li>• ‘More value from the visitor industry’ is one of the key areas of focus for the QLDC economic development team.</li> <li>• ‘Start-Up Queenstown Lakes’ is a local charitable trust established to drive innovation in the region.</li> </ul>
<b>4.2 – Support existing biking businesses to diversify their offering outside of tourism</b>	<ul style="list-style-type: none"> <li>• Explore opportunities for development or attraction of technology companies surrounding biking.</li> <li>• Discuss with Queenstown Resort College (QRC) the opportunity to develop specialised training surrounding the biking industry.</li> <li>• Investigate ways of supporting local biking industry members in exporting their intellectual property.</li> </ul>	<ul style="list-style-type: none"> <li>• One of QLDC’s key areas of focus is to help encourage industry diversity.</li> <li>• A growing local niche is technology for tourism - technology that can be used to drive productivity, customer experience, and the product offering.</li> <li>• New Zealand Story may be able to provide further resources and advice around the potential exportation of IP.</li> <li>• Examples of tech companies surrounding biking: Zerode (hardware), Break Ace (technique aid).</li> <li>• Other opportunities: virtual coaching, safety enhancements, motion capture for gaming/virtual reality.</li> </ul>
<b>4.3 – Identify opportunities for biking community (locals + visitors) to contribute to local conservation initiatives</b>	<ul style="list-style-type: none"> <li>• Approach local conservation groups to potentially partner with and provide support (volunteers and/or funding) to.</li> </ul>	<ul style="list-style-type: none"> <li>• Whakatipu Reforestation Trust’s vision is the protection and restoration of the native biodiversity of the Wakatipu basin through revegetation projects, collaboration, education, and advocacy.</li> <li>• Whakatipu Wilding Conifer Control Group focus on protecting the biodiversity and the remarkable landscape of the Whakatipu for the benefit of residents, users, tourists, and particularly, future generations.</li> <li>• Whakatipu Wildlife Trust are an umbrella organisation formed to connect, grow, and support the region’s predator-free efforts.</li> </ul>

WORKSTREAMS (Strategic Priorities)	KEY ACTIONS	FURTHER FEEDBACK, SUGGESTIONS & IDEAS
<b>4.4 – Ensure appropriate acknowledgement of mana whenua, Te Reo, tikanga and te ao Māori (Māori world view)</b>	<ul style="list-style-type: none"> <li>Establish a relationship with mana whenua (Kāi Tahu), and each of the 7x rūnaka as appropriate.</li> <li>Agree process around new trail developments and use of Te Reo/Māori culture in storytelling.</li> <li>Engage with iwi partners whenever deemed appropriate.</li> </ul>	<ul style="list-style-type: none"> <li>Appropriate engagement, consultation, and partnership with both Kāi Tahu as the overarching iwi, and the 7x local rūnaka in the Queenstown area can be challenging given the limited number of iwi representatives living in the Queenstown region, and the heavy demand on these representatives for consultation and engagement.</li> <li>The Destination Management Planning process currently underway will hopefully establish clearer channels of communication with iwi.</li> </ul>
<b>4.5 – Develop the social license and community sentiment of bike-tourism in Queenstown</b>	<ul style="list-style-type: none"> <li>Investigate methods available to capture the Queenstown community sentiment towards bike-tourism.</li> <li>Ensure the capture and sharing of ‘good news’ content and stories surrounding the positive impact biking is having on the Queenstown community.</li> <li>Ensure positive impacts of biking tourism is communicated to potential biking visitors.</li> </ul>	<ul style="list-style-type: none"> <li>Community sentiment towards biking, and bike tourism could be included in other community insight work surrounding the wider tourism industry.</li> <li>Promotion of social license should focus on educating the wider Queenstown community on the positive benefits that biking visitors bring to the region.</li> <li>It should also be made clear to biking visitors (both real and potential) the benefits they are providing the community by choosing Queenstown for their biking destination.</li> </ul>
<b>Notes: Managing trail use is captured in Aspiration 2 – ‘Make it easy, and awesome’ above.</b>		



## 5. Work together

The Queenstown biking community is cohesive and collaborative.

The local biking industry is united in their shared passion and work together using a collaborative advantage approach to ensure the Queenstown biking experience is optimised for everyone, from both a recreational and commercial point of view.

### Workstreams

- Establish a Queenstown biking industry association to improve communication and collaboration
- Establish a biking market steering group to inform key decisions align strategies, and guide land use

### Opportunities

- Cohesive + Collaborative approach
- Community Involvement
- Working Groups.

### Challenges

- Number + Diversity of Stakeholders
- Constraints (lack of time)

### Related Strategies & Projects

- Destination Management Plan - Regenerative Tourism By 2030
- Queenstown Trails Trust Strategic Plan
- Queenstown Mountain Bike Club 2018 - 2028 Strategic Plan
- Wakatipu Way to Go (Waka Kotahi, QLDC, ORC)
- QLDC District Plan.

WORKSTREAMS (Strategic Priorities)	KEY ACTIONS	FURTHER FEEDBACK, SUGGESTIONS & IDEAS
<b>5.1 – Establish a Queenstown biking industry association to improve communication and collaboration.</b>	<ul style="list-style-type: none"> <li>Establish a biking working group that meets on a semi regular basis to ensure communication and collaboration across the sector.</li> <li>Consider the inclusion of aligned community groups and organisations.</li> </ul>	
<b>5.2 – Establish a biking market steering group to inform key decisions align strategies, and guide land use.</b>	<ul style="list-style-type: none"> <li>Establish a small steering group to engage and guide DQ with the delivery of the plan. Group will include key biking related bodies and potentially wider stakeholders like QLDC and DOC.</li> </ul>	

## Next Steps

To ensure the optimal development of the Queenstown biking market, it is recommended that the following steps be taken next.

### Step 1: Prioritisation of workstreams

It should be acknowledged that this report contains a substantial number of recommended workstreams and associated actions which in practical terms are likely to not align with available resourcing. It is therefore suggested that these are taken through a process of further refinement and prioritisation to identify those workstreams and actions of most significant importance or value when compared against the investment required.

### Step 2: Establishment of working group(s)

To ensure this development plan is prioritised and actioned appropriately, it is recommended that an industry body of some form representing the wider Queenstown biking sector is established. It may also be appropriate for this wider group to elect, or at least work alongside a steering committee of decision makers dedicated to the continued development of the Queenstown biking offer.

### Step 3: Success measures

It will be noted that the recommended workstreams contained within this report do not include suggestions in terms of appropriate success measures.

These should be agreed upon as part of the prioritisation process, with associated benchmarks and timelines included where possible.

### Step 4: Allocate, action, assess

Once agreed, prioritised workstreams and associated actions should be assigned to relevant parties, with clear expectations, success measures, and timelines set and agreed to ensure accountability in their delivery.

### Step 5: Ensure alignment with relevant strategies + planning

At the time of writing there are several strategies that have been either recently released or are in current development, that will likely influence the ability to achieve the aspirations identified within this report (e.g., QLDC Ten Term Plan, Destination Management Planning, and QLDC Diversification Strategy). Every opportunity to reassess and realign with these strategies should be taken when appropriate.

### Step 6: Revision of guiding document

To ensure this market development plan remains fit for purpose it should be revised and refreshed at appropriate intervals.



## Appendix A – Consultation

**Table 3.** Workshop attendees

Company Name	Full Name
Alta	Aaron Fernandez
Around the Basin	Lisa Cooper
Around the Basin	Hamish Fleming
Around The Basin	Steve Norton
Around the Mountain	Mike Barnett
Better by bike	Matt Hirst
Bikeaholic	Mat Weir
Bikeaholic	Justin Worth
Cardrona Alpine Resort/Cardrona Bike Park	James Mulcahy
Cardrona Bike Park	Graham aka Spy Dunbar
Charge About Queenstown Electric Bikes	Campbell Read
Coronet Peak	Erin Greene
Coronet Peak	Nigel Kerr
Elevate Trail Building	Tom Hey
QMTBC Juniors Committee	Donna Macintosh
Queenstown Mountain Bike Club	Ronnie Baker
Skyline Queenstown	Richard Ferguson
Skyline Queenstown	Justin Matthews
Skyline Queenstown	James Ramsay
Skyline Queenstown	Wayne Rose
Skyline Queenstown	Richard Thomas



**Table 4.** Individual/Small Group Engagement Sessions

<b>Company Name/Capacity</b>	<b>Position</b>	<b>Full Name</b>
<b>Central Otago Queenstown Trails Network Trust (COQTNT)</b>	Board Trustee	Aaron Halstead
<b>Central Otago Queenstown Trails Network Trust (COQTNT)</b>	Board Trustee	Trish May
<b>Department of Conservation (DoC)</b>	Operations Manager	David Butt
<b>Department of Conservation (DoC)</b>	Whakatipu Community Advisor – Team Leader	Lisa Nilsen
<b>Department of Conservation (DoC)</b>	Senior Visitor Advisor - Southern South	Meg Embleton-Muir
<b>Southern Lakes Events Investment Panel</b>	Events Manager	Sarah Frost
<b>Glenorchy Trails Trust</b>	Chairman	Matt Belcher
<b>Queenstown Lakes District Council (QLDC)</b>	Relationship Manager Arts and Events	Jan Maxwell
<b>Queenstown Lakes District Council (QLDC)</b>	Economic Development Manager	Peter Harris
<b>Queenstown Lakes District Council (QLDC)</b>	Parks Officer, Volunteers /Community Services	Samantha Marsh
<b>Queenstown Lakes District Council (QLDC)</b>	GM – Community Services	Thunes Cloete
<b>Queenstown Mountain Bike Club (QTMBC)</b>		Emmerson Wilken
<b>Queenstown Mountain Bike Club (QTMBC)</b>	President	Pete McInally
<b>Queenstown Mountain Bike Club (QTMBC)</b>	n/a	Rod Drury
<b>Queenstown Trails Trust (QTT)</b>	CEO	Mark Williams (Willy)
<b>Queenstown Trails Trust (QTT)</b>	Trustee	Wendy Pannett
<b>Southern Eco Trails Trust (QTT)</b>		Matt Hollyer
<b>Southern Eco Trails Trust (QTT)</b>		KJ Jennings

## Appendix B – Biking Market Analysis

### SUMMARY

- Mountain bikers are generally white, affluent men aged between 35-60.
- Two key segments:
  - ‘Holiday first’ Holiday
  - ‘Passion first’ Destination
- There is a significant number of bikers domestically and in New Zealand’s main source markets
- People who like to MTB also like other outdoor activities, especially tramping
- A diversity of trails and levels is important to expand participation. Easy tracks may be useful for this
- Trail/ Mountain Biking is a growing pastime, and e-bikes are a key growth component of this. This brings many opportunities
- Female biking is a real opportunity
- The hire/ retail shop is a critical aspect of the experience
- Connectivity between services is important
- Rotorua is a main competitor in New Zealand
- Natural settings, track quality, food and drink and supporting infrastructure are key considerations in destination choice
- Passion first bikers tend to travel in groups and enjoy craft beer and burgers. The social aspect of the travel is very important to them.

### INTRODUCTION

Biking is growing as a sport and recreational pastime globally. Many places are seeking to capitalise on the opportunity presented by this growing

market that is generally affluent<sup>10</sup> and has an appetite for expansion of skills, new experiences and locations<sup>11</sup>. In particular, ski resorts have been diversifying into mountain biking to alleviate off season pressure for some years as there are many symbiotic relationships between skiing and mountain biking infrastructure and market needs.

As a nature-based, active pursuit, biking is particularly well aligned to the Queenstown offering in terms of market preferences and product offer. Not only this, Queenstown has its own active biking population, with a thriving club that has been instrumental in the development of a number of local tracks and trails that are also used by visitors.

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

1. ‘Holiday first’ Holiday Bikers
2. ‘Passion first’ Destination Bikers<sup>12</sup>

Although the travel and biking behaviour of these two segments are considerably different, they are both important to the success of a destination seeking to maximise the biking infrastructure available in the area. The recent AusCycling Report published in March 2021<sup>13</sup> segments riders into five categories and evaluates their market potential. Any of these five categories could travel as Destination Bikers or Holiday Bikers. It is possibly more likely that the Leisure and Enthusiast markets will be Holiday 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.

<sup>10</sup> Buning, Cole, and Lamont (2019)

<sup>11</sup> Moularde and Weaver (2016)

<sup>12</sup> TRC (2017)

<sup>13</sup> AusCycling (2021)

**Table 5.** AusCycling categories of riders (note not all are applicable/ correspond to Queenstown)

Market	Description	Market potential*
<b>Leisure</b>	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.	<b>Significant</b>
<b>Enthusiast</b>	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	<b>Significant</b>
<b>Sport</b>	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.	<b>Small but influential</b>
<b>Independent</b>	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.	<b>Small</b>
<b>Gravity</b>	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	<b>Small but growing rapidly</b>

\*Identified by AusCycling

## HOLIDAY BIKING MARKETS

The Holiday Biking Market is the market of people who go on holiday to Queenstown for any reason other than the express purpose of biking, and then, whilst on holiday or as part of 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.

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 bikes on the Taste Tasman Trail whilst on holiday, it is likely that this will build an enthusiasm for the sport, which will potentially grow the attractiveness of Queenstown as another place to ride.

Holiday bikers do not always bring their 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.

Holiday bikers may not access 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 Queenstown 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 bikers.

The biking product fits with a number of Tourism New Zealand's nine domestic leisure market traveller segments<sup>14</sup>, shown below. Of these, biking fits well within:

- Family and friends
- Family fun
- Explore nature
- Wine, food & scenery
- Sports & events.

Together, these markets make up around 60% of the market and present a number of opportunities for Queenstown to package the biking product according to these markets' travel needs.

---

<sup>14</sup> Digit.NZ (2021)

Figure 1. Tourism New Zealand's domestic market segments



Source: Digit.NZ (2021)

## POTENTIAL SIZE

Prior to COVID-19, Queenstown received around 3.3 million visitors per year, 70% of whom were international visitors and 30% domestic<sup>15</sup>. COVID travel restrictions have provided an opportunity for New Zealanders to experience Queenstown without competing with the international market, as well as substituting for holidays that may have been taken outside the country.

People visit Queenstown via road or airport, with the airport usually channelling around 30% of Queenstown's visitors<sup>16</sup>. Queenstown airport arrivals dropped from over 1 million visitors in 2019 to around 630,000 in 2020<sup>17</sup>.

Any person engaging in biking whilst on holiday is likely to at least be able to ride a bike and is also more likely to be interested in the pastime in their hometown. Data on participation rates in key source markets and information on the behaviour of these markets whilst in New Zealand can provide some insight into the potential size of the biking markets.

## The New Zealand market

Participation trends captured by Sport NZ in 2019 shows that across NZ, about 10.2% of the population are interested in biking, 6.2% participated

in the previous year, 4.0% are likely to participate in the next six months and 1.4% attended a biking event<sup>18</sup>. Translated into real figures, this looks like an estimated available market of New Zealanders interested in biking of just under 500,000 people. Although not all of these people may wish to travel, or biking 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 biking, but this still indicates a significant market opportunity to engage New Zealanders in biking once they travel to Queenstown.

---

<sup>15</sup> Destination Queenstown (2020)

<sup>16</sup> Destination Queenstown (2020)

<sup>17</sup> Queenstown Airport (2021)

<sup>18</sup> Sports NZ (2019)

## The Australian market

In Australia, the biking market size has been estimated at 388,900, just under 2% of the population. Just under 3 million people (14%) participate in cycling of some sort<sup>19</sup>. 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 New Zealand<sup>20</sup>.

In terms of travellers who bike whilst on holiday, the Tasmanian Visitor Survey provides an insight into this. Of the 1.3 million visitors who visited Tasmania in the YE March 2020 (interstate and international), 27,000 of them participated in 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 Queenstown could convert visitors at a higher rate<sup>21</sup>.

## The rest of the world

Whilst the rest of the world is unlikely to be an accessible market for some time, when they do return, they will be lucrative markets for biking in Queenstown. Providing high yields and engaged travellers who stay longer and spend more, the North American and European markets in particular may also enjoy the opportunity to ride during a time they may not be able to at home.

Europeans, including Germans and UK visitors together just exceed Australians in terms of the number of international visitors riding bikes in New Zealand, at 59,000 in the YE 2019. During the same year, NZ received much smaller numbers for the US and China, with 19,000 and 15,000 visitors riding bikes in NZ respectively. Table 7 shows the relative participation in cycling for these major source countries whilst on holiday in NZ.

<sup>19</sup> AusPlay (2020)

<sup>20</sup> Figure.NZ (2020)

<sup>21</sup> Tourism Tasmania (2020)

**Table 6.** International participation in cycling by origin<sup>22</sup>

Country	Arrivals YE Jan 2020	Cycling whilst in NZ	% Cycling whilst on holiday in NZ
<b>Australia</b>	1,542,467	58,179	3.8%
<b>Europe</b>	549,682	59,144	10.8%
<b>US</b>	370,466	18,699	5.0%
<b>China</b>	413,599	14,613	3.5%

Whilst it is not specified what type of bikes these people are riding, the figures in this table present an opportunity for Queenstown 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.

European participation in cycling is significant. In 2021, there are 62 million bikes owned in Germany, 23 million in Italy and 20 million in the UK<sup>23</sup>. 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<sup>24</sup>. With over 17% of US residents participating in some kind of cycling, there is an opportunity to expand the current 5% of visitors currently cycling whilst on holiday in NZ.

<sup>22</sup> Figure.NZ, NZ.Stat.

<sup>23</sup> Bicycle Guider (2021)

<sup>24</sup> Outdoor Industry Association, 2020

## CHARACTERISTICS

### Gender balance

Historically biking, especially the more mountain bike styles is a male dominated pastime. In NZ and Australia in 2020, the split in participation for mountain biking is around 80% male to 20% female<sup>25</sup>. 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<sup>26</sup>.

The significant opportunity to engage female riders is under-researched, but indications suggest that the male-dominated social worlds of biking shops, hire places and fellow trail users may be a barrier to participation<sup>27</sup>. Initiatives such as the Dirt Town Queens in Queenstown<sup>28</sup>, Bellas on Mountain Bikes in West Auckland<sup>29</sup> and the Cycling Action Network's Wellington Rides for Women<sup>30</sup> provide opportunities to engage with this significantly latent market for growth within New Zealand. As a highly networked market, a local base of female riders could be harnessed to promote female engagement through below-the-line marketing initiatives.

In research completed by QTT and TRC in 2017 which focused on the trail biking style, the bike type is predominantly a mountain bike (84%) mostly in the 40-60 age bracket (with 49% of users) and in contrast to mountain biking a very even gender split.

<sup>25</sup> AusPlay (2020)

<sup>26</sup> Buning and Gibson (2016)

<sup>27</sup> Buning et al. (2019)

<sup>28</sup> Stuff.co.NZ (2018)

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

Studies across nations indicate that bikers are generally aged between 30-60, are well educated and earn more than the national average<sup>31</sup>. In Europe, around 38% of bikers have an academic degree. Figure 2 below shows the distribution of participation in mountain biking by age and gender. Research completed by TRC focusing on QTT users found that the average income was between \$60,000 - \$80,000 then followed by the +\$200,000 bracket.

### Mountain biking participation by age in Australia<sup>32</sup>



<sup>29</sup> Sport Waikatore (2019)

<sup>30</sup> Cycling Action Network (2021)

<sup>31</sup> AusCycling (2021), AusPlay (2021), Buning et al. (2019), IMBA (2018)

<sup>32</sup> AusPlay (2021)



## 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 bikers in New Zealand who may not yet be passion first bikers but may be interested in participating in biking whilst on holiday.

### 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.

For more mountain bike style trails Trailforks has combined trail star rating and raw trail usage data to name the best and most popular tracks in New Zealand<sup>33</sup>, all of which are rated intermediate, and all are in Whakarewarewa Forest in Rotorua:

1. Eagle vs Shark – with picnic table
2. Underbilly
3. Bunny Jugs 1
4. Billy T
5. Challenge Roadside

The top-rated trail (with the most 5-star ratings) in Trailforks are Fernhill Trails in Queenstown, followed by Makara Peak MTB Park in Wellington, both of which are double black diamond (extremely difficult) rides. Kachoong in the 7 Mile Riding Area is third and is intermediate.

Given the competitive landscape of NZ mountain biking, there appears to be a number of beginner rides, presenting a significant opportunity to access an untapped market of riders. In Australia, the leisure market has

<sup>33</sup> <https://www.trailforks.com/region/new-zealand/trails/>

been identified as that with the most potential. An extensive entry level ride with variety, environmental quality, place-based context (such as historical narrative), supporting infrastructure and reasonably priced gear hire may activate some of the 500,000 people who are interested in MTB in New Zealand and many more in Australia.

**Table 7.** Trail makeup of main trail areas in Queenstown from Trailforks data<sup>34</sup>

Trail area	Number of trails			Length of trails (km)		
	Easy	Int.	Hard	Easy	Int.	Hard
<b>Queenstown Bike Park</b>	3	5	22	7.0	4.3	6.3
<b>7 Mile Riding Area</b>	5	16	3	3.5	10.3	0.7
<b>Coronet Peak</b>	0	7	2	0	4.0	25.6
<b>Cardrona</b>	2	8	10	3.0	6.4	15.1
<b>Fernhill Trails</b>	0	9	7	0	30.6	2.7
<b>Total</b>	<b>10</b>	<b>45</b>	<b>44</b>	<b>13.5</b>	<b>55.6</b>	<b>50.4</b>
<b>%</b>	10%	45%	45%	11%	47%	42%

Destination Queenstown's information suggests that Fernhill Trails range from beginner, however this is not reflected in the Trailforks data. In Queenstown's main trail riding areas shown in Table 8, there are ten easy trails, totalling 13.5km out of just under 120km of trails, which is about 11%. Each of these trails are rated four star or below by the users.

<sup>34</sup> <https://www.trailforks.com/region/new-zealand/trails/>

Growing the Holiday first MTB market may require more opportunities for entry-level riders.

### A range of trail options and ancillary services are important

For the more trail riding styled options in Queenstown which are primarily established by the Queenstown Trails Trust and are part of the New Zealand Cycle trails findings differ slightly from the more MTB style preferences. These bikers indicate that appropriate grading, well maintained, safely built trails (e.i. appropriate trail gradient/ slope or sharp bends) and appropriate and easy to understand signage (wayfinding) were key preferences.

Additionally like mountain bikers they enjoy the off bike activities and ancillary needs are high on the priority. This includes high quality bike hire, transportation (especially due to the “through” riding nature of the QTT currently), and on track destinations/ points of interest like wineries and historic points of interest.

From MBIE’s evaluation of the New Zealand Cycle Trail network completed in 2020 which gathers and evaluates trail usage from counters on all 22 NZ Trail Great Rides the Queenstown Trail network is one of the most popular trails in the network with 131,037 cycle trips recorded plus a further 3,319 from the Around the Mountain trail. The most popular areas with the highest counts are noted opposite.

**Table 8.** Trail popularity on Queenstown Trails, New Zealand Cycle Trail counter data

Trail area	Count	
	Uses	Counts
<b>Kawerau Falls</b>	32,182	58,522
<b>Old Shotover Bridge</b>	31,328	48,058
<b>Old School Road</b>	30,050	42,929
<b>Arrow River</b>	43,736	62,480
<b>Morven Ferry Road</b>	39,069	43,410

Building aspiration through capturing and sharing more diverse range of rides will also establish Queenstown as an iconic biking destination. Drawing on YouTube videos of rides and experiences, as well as magazines and social media, Holiday First bikers will build an idea of Queenstown as an iconic biking location. Supported by online planning infrastructure, this imagery will contribute to the early stages of the customer journey that can contribute to destination choice for holidays.

### 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<sup>35</sup>

Similarly, Destination Queenstown insights<sup>36</sup> identified the following preferences for NZ bike riders:

- Scenery/views/nature to appreciate
- An undulating route
- Socialising with others
- New areas to explore
- Ride duration of 2-3 hours
- Smooth/fast/open track surfaces
- Exercise/fitness workout

Features which were more important to more mountain style riders were physical and technical challenge, single-track which is tight/narrow/winding, rough/technical/tight track surfaces, fast/technical/tight downhills, more challenging uphill, and racing. In addition, experiencing some speed/excitement/risk was generally more important for experienced riders than beginners.

Features which were more important to more trail riders were gentle/gradual/easy uphill, smooth/easy/open track surfaces, ride duration of 1-2 hours, few obstructions or difficulties on tracks, relaxation/easy riding/cruising, slow/gentle/easy downhills, and riding on sealed roads. Experiencing peace/quiet/solitude was also a little more important to beginner riders.

Corresponding with the primary reason of enjoying nature, across the major source markets, outdoor pursuits and activities go hand in hand with biking. By far the most popular activity complementing biking is

<sup>35</sup> IMBA (2015)

<sup>36</sup> Destination Queenstown Resource Gathering (2021)

bushwalking (tramping) or hiking. Others identified in studies include camping, kayaking, fishing, skiing, football, running, gym/fitness, swimming, bushwalking and cycling<sup>37</sup>.

## The shop is important

As with skiing, the bike shop or hire point is a focal point for local advice, communication about track conditions and closures, direction to information sources, acquisition of gear, repairs and professional assistance. 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, etc.)

## MTB is predominantly not a winter pastime

Aligned with the market opportunity for Queenstown to capitalise on the no-snow months, 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%)<sup>38</sup>.

<sup>37</sup> AusPlay (2020), Buning et al. (2019), Moularde & Weaver (2016)

<sup>38</sup> Buning et al. (2019)

## FUTURE TRENDS

There are two key biking trends to be aware of - participation is growing due to wider demographic reach and gender appeal, and electric bikes (e-bikes) are also a rapidly growing segment of a growing market.

COVID-19 has boosted biking, with a surge in demand creating world-wide shortages. 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<sup>39</sup>.

In 2019, Deloitte released their technology predictions for 2020 foreseeing a surge in e-bike sales<sup>40</sup>. E-bike sales 'skyrocketed' during the lockdown period, with retailers in the US and Europe reporting 80%-140% increases in sales since their lockdowns began<sup>41</sup>. E-bikes present a number of opportunities for MTB development in a destination like Queenstown. In particular, they present a significant opportunity to expand the market to older or less fit participants who may not enjoy the exertion of uphill or longer rides<sup>42</sup>.

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<sup>43</sup>, 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.

---

<sup>39</sup> Forbes (2020)

<sup>40</sup> Deloitte Insights (2019)

<sup>41</sup> Electrek (2020)

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 lockdowns, meaning that the overall leave balance in Australia available for holidays has declined.

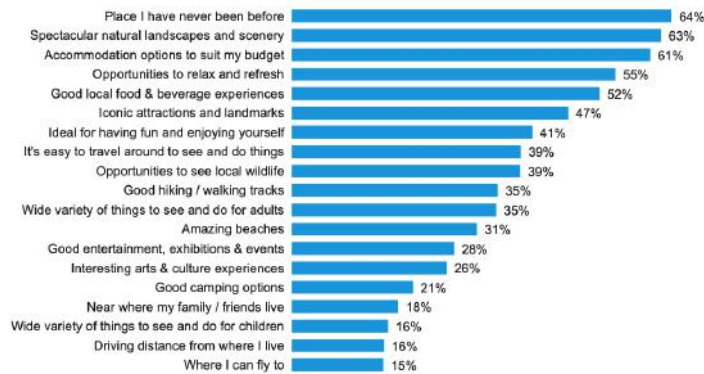
Recent Tourism New Zealand data also indicates that annual leave is an issue for Kiwis as well, although events may activate some people for a weekend trip<sup>44</sup>. The research also shows that New Zealanders are keen to explore places they have never been before and are particularly motivated by spectacular landscapes and scenery, accommodation options to suit their budget and opportunities to relax and refresh. Figure 2 below shows the full range of drivers for a holiday experience in New Zealand.

<sup>42</sup> Buning et. Al (2019)

<sup>43</sup> Bike Exchange (2018)

<sup>44</sup> Kantar (2021)

**Figure 2.** Aspect New Zealanders are looking for in the New Zealand holiday (% NZers planning a holiday)



Whilst these drivers are not a future trend as such, they are an indicator of future travel for Queenstown to be aware of.

## THE PASSION/ DESTINATION BIKING MARKET

The Passion or Destination Market are those who travel for their passion first – for the express purpose of biking. Typically, but not always, they will bring their 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. Predominantly this market is largely focused on the more mountain bike style offerings.

A New Zealand study found that the quality of trails and riding opportunities are at the core of bikers’ destination preferences, but for ‘serious’ riders, the destinations are evaluated as they seek to collect new

experiences that align with their skill level<sup>45</sup>. Destination Queenstown research has indicated two sub-segments within the destination biking market, which largely mirrors the existing biking market in Queenstown. These people have intermediate to more advanced riding skills and regularly travel to bike and would likely have visited other New Zealand or international biking destinations. These riders seek high quality trails with good supporting infrastructure in scenic/natural locations.

Tourism Tasmania has defined the passion/ destination bikers into two personas:

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.

A study in the US<sup>46</sup> has shown that there are both push and pull factors for destination 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.

<sup>45</sup> Moularde and Weaver (2016)

<sup>46</sup> Buning (2019)

**Pull factors:** site attributes were wide ranging from fast, flowy single track trails to nearby amenities. (Buning 2019 – Taylor 2010)

## MARKET CHARACTERISTICS

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

In Australia, Tourism Tasmania have published the results of research they conducted into the Australian MTB 'passion first' market, which is directly relevant to the Australian market travelling to NZ and possibly also the NZ market travelling to Queenstown. 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

---

<sup>47</sup> Buning et al. (2019)

<sup>48</sup> Buning (2020)

about 400 miles per trip during the spring and summer months, and in the process spend around US\$400 per trip<sup>47</sup>.

## 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<sup>48</sup>.

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<sup>49</sup>.

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

<sup>49</sup> Tourism Tasmania (2019)

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.

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.

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.

Beyond the quality of the trails and riding experience, 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.

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

---

<sup>50</sup> (Downward, Lumsdon, & Weston, 2009)

<sup>51</sup> Kantar (2020)

(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.

### **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.

### **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<sup>50</sup>.

### **Events**

Research conducted for Tourism NZ<sup>51</sup> 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<sup>52</sup>.

<sup>52</sup> Getz and McConnell (2011)

## COMPETITOR PROFILE – PASSION/ DESTINATION

The Destination Queenstown resource gathering has already completed a comprehensive competitor profile, below.

### ROTORUA

- More the 65 km of purpose-built MTB trails linked to a network of forest roads (downhill, cross country, single track)
- Number of 'core' trails designated MTB only, maintained by volunteers
- Support amenities (toilets, parking, picnic facilities)
- Full range of services in Rotorua including MTB hire, bike shops, tours and skill clinics, cafes, dining, range of accommodation
- Established a MTB scene 25 years ago
- \$13.5m in economic value PA in 2018
- People who ride in Rotorua's Whakarewarewa forest contribute between \$30m to \$50m in spending annually to the local economy. That's 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 come 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.
- Hold Crankworx annually - Economic benefits of Crankworx 2016 put the benefits of just five days of the event at more than \$8 million.

#### Strengths

- Proximity to AKL (weekend warriors)
- Ferns (beauty)
- Crankworx – internationally renowned
- Full range of services – MTB hire, bike shops, skills clinics, cafes, dining, accommodation
- Well established MTB network (180kms) and still being developed. Ease of accessibility – just 5 mins from downtown
- Huge range of MTB events

#### Weaknesses

- 'Atmosphere' – lacking in the highly social aspect of the sport and the off bike eating/ drinking options

#### Terrain:

- Vertical / elevation
- Type of track
- Variety: loam, rock rolls, tech, wooden features, high speed jump trails
- Weather: most riders prefer to ride in shoulder season due to high temps in summer
- Forest trails. Tree cover is a positive as provide some shield from elements like sun and wind (jumps)
- Gravity-fed means that there is little to no pedalling involved, gravity does all the work for you.

#### Events:

- Rotorua Bike Festival (annual, 10 days)
- Crankworx Festival
- Whaka100 (one of the toughest MTB marathons in the Southern Hemisphere) – part of the Rotorua Forest Festival
- Giant 2W Gravity Enduro – 3 race events over summer



## NELSON

- Generated \$15.5 mill in 2018 - attracts 20,000 riders PA in 2016 to the region

### Strengths

- Rated as a Gold Ride Centre by IMBA (one of only 6 worldwide)
- Well established MTB and road cycling, catering to all interests – leisure, food & wine, hardcore MTB. Mix of grades and styles.
- Combination of beginner trails and advanced tracks
- 1 of 6 gold rated IMBA destinations
- Extraordinary food & wine scene (vineyards, cellar doors, craft breweries, restaurants & eateries)
- Trail accessibility
- Network of bikes parks, close to town + further afield
- Backcountry riding - Heaphy track

### Weaknesses

- Accessibility and flight prices.

### Terrain:

- Vineyards, mountain bike parks, coastal roads
- “The Great Taste Trail” – diversity of experiences, riding through towns, coastlines, orchards & vineyards, riverside.
- Coppermine Trail – renowned as one of NZ’s most accessible alpine mountain bike rides (relatively easy up, exhilarating down, rocky tops, beech forest, meandering river trail). Day ride, near cafes and restaurants.
- Wairoa Gorge MTB Park – just 45mins drive from central Nelson, 70kms of hand built MTB trails through lush native and beech forest (style: backcountry riding but bike park convenience). Grades 3-6. Mix of styles - flowing bermed smooth trails, slow techy rock trails, root infested off-camber and relaxing waterfall lined cruisy trails. Shuttle pick up so no need to ride uphill

### Events:

- Coppermine 2020
- Mammoth Enduro 2020 (New Zealand's toughest truly epic single day, multi-stage Enduro race)

## Taupo

### Strengths

- Rideable trails year round – pumice tracks remain hard & fast
- Internationally recognised as a silver level ride centre by IMBA meaning that it is home to large-scale MTB facilities for all riders (1 of 11 worldwide)
- Proximity to natural thermal springs, and established après bike activities (jetboat, bungee, cuisine, beer & wine)
- Cycling & MTB events calendar
- Established road cycling fraternity
- Internationally recognised quality trails
- Trails for every rider skill level
- Year-round riding
- Après bike scene – sailing, jetboating, rafting, bungee, beers/wine & food, geothermal hot pools

### Weaknesses

- Distance: 3 and ½ hr drive from Auckland

### Terrain

- 220km of Single track
- Native forest and river and lakeside rides
- Variety – river crossings, hill climbs, rocky terrain
- Mostly caters to easy-intermediate riders
- Multi-day trail rides – can get hot in summer months
- Grade 5 downhill
- BMX jump parks
- Road cycling

### Events

- The Gambler
- Craters Classic MTB event
- BDO Lake Taupo Cycling Challenge (NZ's largest road cycling event)
- Ironman Taupo (road cycling)

## Christchurch

### Strengths

- Longest chairlift in NZ to top of Port Hills (Adventure Park) – caters to all riders + year round riding
- Mix of MTB, family cycling and road cycling
- Solid offering of advanced trails
- “Gateway to the south island” for international travellers
- Hundreds of kms of MTB tracks and scenic road rides
- Variation of trails - from XC loops to pine forest downhill trails
- Good options for learning – flat & slightly undulating terrain with small natural features

### Weaknesses

- Backcountry riding located outside of Christchurch – Craigieburn is a two hour drive west.

### Terrain:

- Flat road cycling & hill climbs
- Off-road trails around Port Hills, Adventure Park – lift assisted. Mix of flow trails (man-made) and technical trails (natural terrain – mix of loose dusty soils and solid bedrock).
- Single track and downhill (Victoria Park)
- Backcountry singletrack (Craigieburn)

### Events:

- The Phoenix Enduro (fourth and final stop in the EWS Asia Pacific Continental Series) – Adventure Park

## Wānaka

### Strengths

- Bike Glendhu bike park (collection of well built tracks)
- Cardona Bike Park
- Off track scene – lots of other adventure sports to do – like ski, hike etc
- Well established biking scene with network of trails. The mountain bike club was started in the early 90's and has around 850 members.
- Tracks are able to be accessed from town.
- Established infrastructure of bike shops, accommodation, hire services
- Quieter than Queenstown

### Weaknesses

- Distance: from international airport – 1 hour from Queenstown (when Queenstown has an established bike scene)

### Terrain:

- Over 750km of tracks (including shared walk/ bike ways), more on the cross country than downhill scale
- Range of difficulty – from beginner to expert and variety of track types (mellow shared use tracks, back country single track, cross country/ enduro and a little down hill)
- Key areas include: Deans Bank, Minaret Burn/ Dingle Burn Tracks, Melina Ridge, Lindis Peak

### Events:

- Contact Epic
- The Big Easy
- Motatapu Race
- Red Bull Defiance
- Deans Bank 10 hour

## COMPETING DESTINATIONS GLOBAL

### Mount Buller, Victoria (Australia)

#### Strengths

- Well established network which is still expanding
- Four lift accessed trails
- Bike hire is an option
- Close-ish to Melbourne (three hours)
- Home to aussies first flow track (copperhead)
- The Southern Hemispheres only IMBA epic trail (the alpine epic – 46km descending cross country trail)
- Aussies biggest pump track
- Home to Aussies only accredited IMBA Ride Centre

#### Weaknesses

- Limited options for food and accommodation as it's primarily a ski resort town and shuts down over winter
- Requires driving to access

#### Terrain:

- Widely varied for all types of biking
- Over 100kms of cross country trails – including 40kms of single track
- 16 km uphill road climb
- Extensive cross country trails
- Gravity feed down hill trails
- Pump track

#### Events:

- Vic Downhill Mountain Bike Series
- Bike Warrior High Country
- GT Bike Buller Festival

## Stromlo Forrest Park (Australia)

### Strengths

- Created with the purpose of a mountain bike
- Caters for variety of biking types
- Full range of services available in Canberra, approximately 10 min drive away
- Have held national champs multiple times and been a part of the UCI world cup (down hill, cross country)

### Weaknesses

- The park has been wiped out a couple of times due to bush fires
- It's a shared use recreational area (with horses and walkers)

### Terrain:

- Developed around the MTB Park concept – caters for all disciplines of MTB
- 2.2 km long downhill course, mountain cross course, 35km of cross country track, 14.8 km beginner MTB track, 10 km intermediate MTB track
- Pump track, jump track, dirt jumps, gravity feed, cross country tracks all on offer with plenty of technical features

### Events

- National MTB Champs
- Held UCI world cup legs in the past

## Tasmania (Australia)

Tasmania is a key competitor for Queenstown in the 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 and 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<sup>53</sup>, uplift, retail, hire, range of accommodation and eateries.

Maydena provides a complementary experience within Tasmania about three hours' drive from Derby. Its 820m+ elevation is its key selling point<sup>54</sup>, with trails the highest in Australian and claiming to be twice as high and twice as long as those in Queenstown. 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 Queenstown in its own right.

<sup>53</sup> <https://bluederbypodside.com.au/>

### Strengths

- Diverse landscape and terrain within a small land area
- Small size of the island allows for easy access between destinations
- Established reputation as a leader in nature-based and adventure tourism
- Range of existing base infrastructure, the majority of which is located within close proximity to towns and urban centres (e.g. new cross country track in Wellington Park)
- Enthusiasm of local biking clubs and individuals
- Known as Australia's mountain biking capital

### Weaknesses

- Isolated location – from rest of Australia and the international markets
- Riding areas aren't near towns
- Limitations on access to the land
- Lack of supporting infrastructure (accom, food, hire and shops)

### Terrain:

- Primarily wet/ temperate forest, makes for a lot of wet riding
- Variety of riding but most are far from towns
- Downhill gravity fed and cross country mostly
- Single tracks
- Jump areas

### Events:

- Wildside MTB race
- Australian Mountain Bike Series (one leg of the series)

<sup>54</sup> <https://www.maydenabikepark.com/about/>

## Colorado (USA)

### Strengths

- **15,000 km of trail (beginner 923 trails, 1742 intermediate, 702 advanced)**
- **Vail mountain cycle trails and gondola access**
- **Fruita Colorado, renowned as a premier MTB destination.**
- **Long history as an epicenter of mountain biking awesomeness, with amazing rides spread out through the entire state. MTB offers mix of technical trails, high alpine epics, and some of the best downhill mountain bike parks around.**
- **Estimated that mountain bikers contribute \$25m to the economy**

### Weaknesses

### Terrain:

- Single track
- Undulating road bike circuits with climbs and canyon views
- Fruita Colorado – mix of leisurely rides, steep climbs, hair-raising switchbacks, intense downhills, and technical challenges that test the best
- High alpine and lift assisted bike parks – Ski resorts transforming into bike parks in summers/autumn – Vail, Breckenridge
- Or desert riding with crazy ridgelines cliffside trails

### Events:

- GoPro Mountain Games (has a trail running and road cycling element)
- Ride the Rockies – 2,000 cyclists in a cross-state tour of the Rocky Mountains – pedalling between 40-100 miles a day
- TripleByPass – 5,000 cyclists traverse 120 miles and three mountain passes (10,000ft elevation)



## Whistler/ BC (Canada)

### Strengths

- Internationally renowned MTB destination
- The huge variety of trails has something for all levels
- Long riding season from May to October
- Easy to navigate without a car
- Plenty of activities and restaurants around town

### Weaknesses

- MTB summer/autumn only
- The bike park can get crowded on weekends and holidays
- Downhill bike rentals can get expensive if you visit for a full week

### Terrain:

- Flow trail and technical trail terrain
- Gravity fed down-hill mtb experience, for all levels of ability

### Events:

- Crankworx:
- Red Bull Joyride
- BC/Canada Cup

## Squamish (Canada)

### Strengths

- Over 215km of trails
- Four season
- Trails for all abilities
- Great post-ride options: restaurants, cafes, breweries

### Weaknesses

- On the way to Whistler, tends to be overlooked

### Terrain:

- Massive trees, moss, greenery everywhere, granite rock slabs and loamy soil are the order of the day when riding in Squamish.
- insane diversity of trails, from some of the best flow trails around to huge rock slabs and gnarly tech.
- Shuttle assisted alpine riding with 1600m descent into Squamish Valley

## TRACK TYPES

Whilst not a market analysis, the recent AusCycling report breaks down the different trail types for MTB. These are more detailed than Destination Queenstown's insight document:

AusCycling	Southland Cycling Strategy	Definition
<b>Cross Country (XC)</b>	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. A broad type of recreational or competitive mountain biking on relatively flat terrain on purpose-built single-track, management trails or 4WD trails. All-mountain riding is a more recent evolution of cross-country riding on more varied, technical and steep terrain using specialised bikes with dual, longer travel suspension.
<b>Flow (FL)</b>		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.
<b>All Mountain (AM)</b>		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
<b>Gravity/Enduro (GE)</b>	Downhill or Gravity	Like All Mountain with greater emphasis on steep, fast, technical descents. Gravity / Enduro trails 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-travel dual suspension and are built for strength.
<b>Downhill (DH)</b>	Downhill or Gravity	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.
<b>Freeride (FR)</b>		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.
<b>Park (PK)</b>	Bike Skills Parks, BMX, Dirt Jumping	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. A bike skills park is an area that provides riders in a community the opportunity to hone their bike riding skills in a managed, progressive, and safe environment before tackling the real trails. These parks can include dirt jumps, wooden bridges, wall rides, pump tracks, and teeter-totters. Also, these parks are frequently targeted at new and younger riders. These venues are a place where new riders can build mountain biking skills.
<b>Touring (TO)</b>		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 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.

## MOUNTAIN BIKING PRODUCTS IN QUEENSTOWN

- Queenstown Bike Park
- Beginner to extreme double black
- Flow and downhill progression, technical downhill and jump tracks
- Below the gondola – close to town
- Bikes go on the gondola.
- Coronet Peak
- Intermediate to extreme double black
- Cross Country and Downhill
- Super Downhill series
- Cardrona Alpine Resort
- Beginner grade 2 to extreme double black
- Downhill and freestyle jump track
- Families – targeted to all levels.
- Gear hire
- 7 Mile Scenic Reserve Mountain Bike Park
- Beginner grade 2 to expert black
- Cross country and downhill
- Ideal for a group of riders at different levels – advanced and beginner
- Fernhill Bike Park (Wynyard Bike Park)
- Beginner grade 2 to expert black
- Cross country and downhill

## REFERENCES

AusCycling (2021). Mountain Biking in Australia: An Economic and Participation Analysis. 9 March 2021. Located at:

<https://assets.auscycling.org.au/s3fs-public/2021-03/mountain-biking-in-australia-final-report-march-2021.pdf?sOhdYZLJUG1eZnmPE8yYmFQbbuOqrfm4=>

Bicycle Guider (2021) Bicycle statistics & facts (of 2021). Located at: <https://www.bicycle-guider.com/bike-facts-stats/>

Bike Exchange (2018) Travelling with an E-Bike.

<https://www.bikeexchange.com.au/blog/travelling-with-an-e-bike>

Cycling Action Network (2021) Wellington Rides for Women. Located at:

<https://can.org.nz/article/wellington-rides-for-women>

Deloitte Insights (2019) Technology, Media, and telecommunications Predictions in 2020. Located at:

[https://www2.deloitte.com/content/dam/insights/us/articles/722835\\_tmt-predictions-2020/DI\\_TMT-Prediction-2020.pdf](https://www2.deloitte.com/content/dam/insights/us/articles/722835_tmt-predictions-2020/DI_TMT-Prediction-2020.pdf)

Destination Queenstown (2020) Queenstown Visitor Snapshot.

Destination Queenstown (2021) Queenstown Visitor Survey.

Elektrek (2020) [Here's why electric bike sales have skyrocketed during the coronavirus lockdown](#). Located at:

<https://electrek.co/2020/05/01/electric-bike-sales-skyrocket-during-lockdown/>

Forestry Commission Scotland (2009) The sustainable development of Mountain Biking in Scotland. Located at:

<https://scotland.forestry.gov.uk/images/corporate/pdf/MTBstrategy.pdf>

Figure.NZ (2020) International visitors riding a bicycle while travelling in NZ. Located at:

<https://figure.nz/chart/VEML4uIxBKc18ApF-Ht8ZuCVWV9UenXOa?ref=bf>

Forbes (2020) E-bikes are the hottest thing on 2-wheels: Here's why you might want one. Located at:

<https://www.forbes.com/sites/larryolmsted/2020/07/09/e-bikes-are-the->

[hottest-thing-on-2-wheels-heres-why-you-might-want-one/?sh=1cf879d1766d](https://www.forbes.com/sites/carltonreid/2020/12/02/e-bike-sales-to-grow-from-37-million-to-17-million-per-year-by-2030-forecast-industry-experts/?sh=1cf879d1766d)

Forbes (2020) E-Bike Sales To Grow From 3.7 Million To 17 Million Per Year By 2030, Forecast Industry Experts. Located at: <https://www.forbes.com/sites/carltonreid/2020/12/02/e-bike-sales-to-grow-from-37-million-to-17-million-per-year-by-2030-forecast-industry-experts/?sh=50017fdf2876>

Kantar (2020) Understanding New Zealander's sentiment towards domestic travel. Research conducted for Tourism NZ. Located at <https://www.tourismnewzealand.com/media/4222/domestic-travel-sentiment-may-20-published-version.pdf>

NZ.Stat (2020) International Travel: January 2020. Located at: <https://www.mbie.govt.nz/immigration-and-tourism/tourism-research-and-data/tourism-data-releases/international-visitor-surveys/international-visitor-survey-data-available-from-stats-nz/>

Outdoor Industry Association (US) (2020) Outdoor Participation Trends Report. Located at: <https://outdoorindustry.org/wp-content/uploads/2015/03/2021-Outdoor-Participation-Trends-Report.pdf>

Queenstown Airport (2021) Queenstown Airport Passenger History. Located at: <https://www.queenstownairport.co.nz/assets/documents/ZQN-Monthly-Passengers-May-22.pdf>

Sports NZ (2019) Insights Tool. Located at: <https://sportnz.org.nz/resources/insights-tool/>

Sport Waikatore (2019) Bellas on Mountain Bikes building relationships and confidence. Located at: <http://www.sportwaitakere.co.nz/newsarticle/85068?newsfeedId=945498>

Stuff.co.NZ (2018) Queenstown's female mountain bike riders are no longer 'chasing boys'. Located at: <https://www.stuff.co.nz/sport/other->

[sports/101593315/queenstowns-female-mountain-bike-riders-are-no-longer-chasing-boys](https://www.stuff.co.nz/sport/other-)

Tourism Tasmania (2019) What makes Mountain Biking Enthusiasts Unordinary? Located at: [https://www.tourismtasmania.com.au/data/assets/pdf\\_file/0014/103352/TTAS-UA-MTB-Enthusiast-Profile.pdf](https://www.tourismtasmania.com.au/data/assets/pdf_file/0014/103352/TTAS-UA-MTB-Enthusiast-Profile.pdf)

TRC (2017) Review of Economic Impact of Mountain Biking in Queenstown. Located at: [https://922a85a2-1f77-480a-8916-996ab20dc701.filesusr.com/ugd/2bf480\\_2ac911c18e9243a29952961ca99c4d90.pdf](https://922a85a2-1f77-480a-8916-996ab20dc701.filesusr.com/ugd/2bf480_2ac911c18e9243a29952961ca99c4d90.pdf)

Buning, R. J., Cole, Z., & Lamont, M. (2019). A case study of the US mountain bike tourism market. *Journal of Vacation Marketing*, 25(4), 515-527. doi:10.1177/1356766719842321

Buning, R. J., & Gibson, H. J. (2016). Exploring the Trajectory of Active-Sport-Event Travel Careers: A Social Worlds Perspective. *Journal of Sport Management*, 30(3), 265-281. doi:10.1123/jsm.2015-0213

Downward, P., Lumsdon, L., & Weston, R. (2009). Visitor Expenditure: The Case of Cycle Recreation and Tourism. *Journal of Sport & Tourism*, 14(1), 25-42. doi:10.1080/14775080902847397

Moularde, J., & Weaver, A. (2016). Serious about leisure, serious about destinations: mountain bikers and destination attractiveness. *Journal of Sport & Tourism*, 20(3-4), 285-303. doi:10.1080/14775085.2016.1164069

