2016

Australian Mountain Bike Market Profile- Survey Data

DIRTART

DIRTART

We are a team of specialist consultants, designers and construction experts dedicated to the design, construction and management of innovative and sustainable mountain bike trails and facilities. We produce fresh and exciting trail concepts based upon proven construction technologies.

‘We are mountain bikers at heart, and will never grow tired of playing in the dirt. We bring with us a true passion and commitment to supporting the progression of our sport.’

Report prepared by Dirt Art November 2016

ABN: 63 164 834 054
Web: www.dirtart.com.au
Email: info@dirtart.com.au
Phone: 1300 TRAILS

Please cite as:

Dirt Art (2016) 2016 Australian Mountain Bike Market Profile- Survey Data

Imagery courtesy of;

McLaine Media

Table of Contents

1 Overview

In June 2014 *Dirt Art* undertook a market profile survey to determine key demographic information and behaviors for the Australian mountain bike user. The survey was advertised widely, and on completion received 2901 responses from across Australia. The aim of the survey was to ascertain information to assist building a market profile of Australian mountain bike users. The information gained from the survey is intended to assist;

- Mountain bike destination development and management
- Trail development and management
- Tour operators and skills providers
- Retail

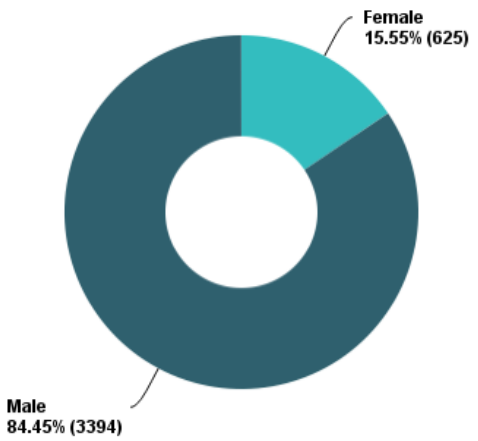
In 2016, the nation-wide market profile survey returned and was open for a two-month period between July and September 2016. The latest survey saw a dramatic increase in respondents with a total of 4,019 participants on completion. The majority of survey questions were retained from 2014, with the exception of a few specific refinements and the inclusion of a sub-focus on mountain bike tourism within Australia. Importantly, the updated survey enables a distinct opportunity to compare previous findings and recognise the latest trends in the current Australian mountain bike market.

Results from the survey can be found below. This document is intended to provide results summaries only along with raw data extracted from the survey. A separate document will provide analysis of the data and data trends.

2 Basic demographic information

2.1.1 Gender

2014	Male:	89.68% (2554)	Female:	10.32% (294)
2016	Male:	84.45% (3394) ↓	Female:	15.55% (625) ↑

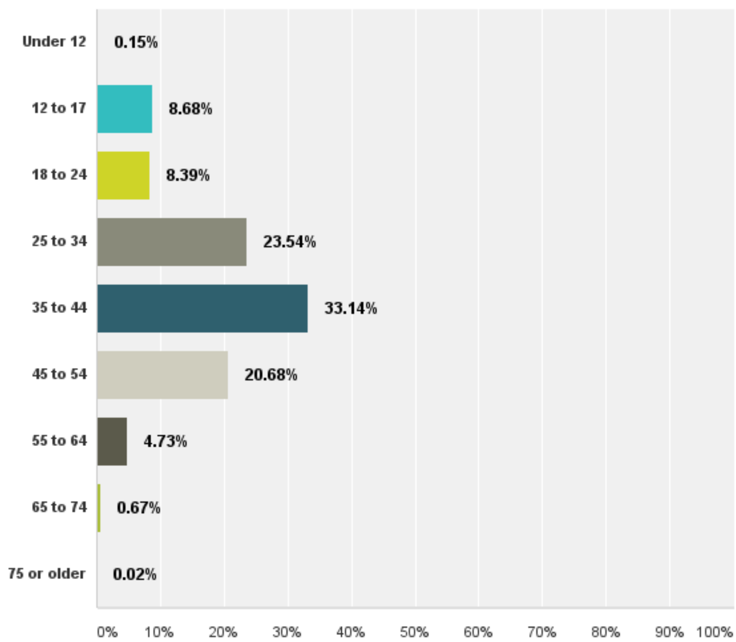


2.1.2 Age

2014	35-44:	37.28% (1080)	25-34:	26.51% (768)
2016	35-44:	33.14% (1332) ↓	25-34:	23.54% (946) ↓

The most common age range of survey respondents remains in the 35-44 years of age (33.14%) category, followed by the 25-34 age bracket (23.54%). The overall percentage of respondents in these two leading age brackets have both decreased slightly by 4.15% and 2.97% respectively. This is attributed to the rise in the 12-17 years of age (+3.26%) and the 45-54 age bracket (+3.66%) as compared with the 2014 survey results.

Remaining response data can be seen in the table below;



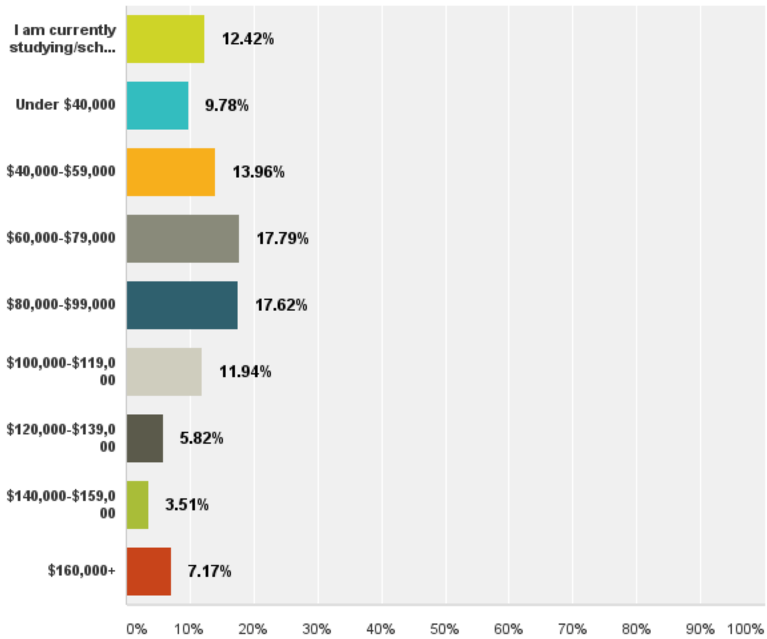
2.1.3 Income

2014	$60-79k:	37.28% (1080)	<$40k:	18.26% (519)
2016	$60-79k:	33.14% (1332) ↓	$80-99k:	23.54% (946) ↑

The most common income bracket was $60-79k (17.79%), followed closely by the $80-99k income bracket (17.62%).

Please Note: An additional category was implemented into the 2016 edition of the survey under the status of *"I am currently studying/school age, or not currently employed"*. This option was added to enable survey respondents to distinguish themselves as persons of limited financial capabilities or unemployed.

Remaining response data can be seen in the table below;

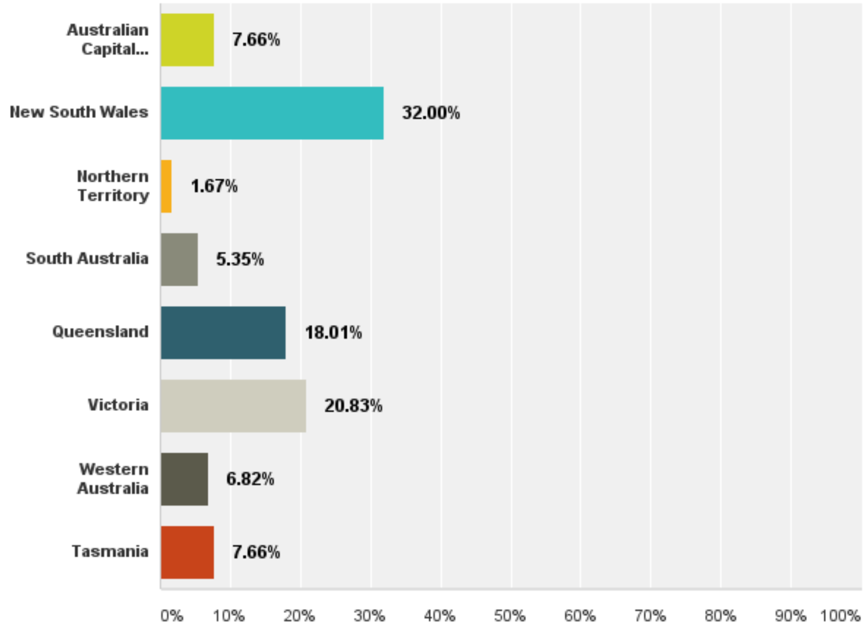


2.1.4 State of residence

2014	NSW:	31.67% (916)	VIC:	22.82% (660)
2016	NSW:	32.00% (1286) ↑	VIC:	20.83% (946) ↓

The most common home state of respondents was New South Wales (32.00%), followed by Victoria (20.83%) – the findings are similar to that of the previous 2014 Survey. That being said, there was a slight decrease in respondents from Victoria (-1.99%) and a more significant drop in numbers from Western Australia (-6.25%). The disparity in numbers between the respondents from Victoria and Queensland have subsequently become less – resulting in Queensland being within 2% of its Victorian counterpart.

Remaining response data can be seen in the table below;



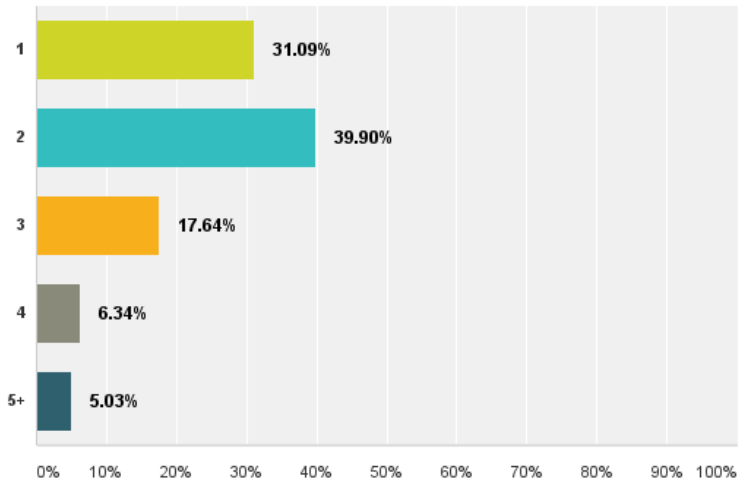
3 Bicycles and equipment

3.1.1 Number of bicycles owned

2014	1 Bike:	38.90% (1113)	2 Bikes:	29.57% (846)
2016	1 Bike:	39.90% (1586) ↑	2 Bikes:	31.09% (1236) ↑

The majority of respondents own two mountain bikes (39.90%), followed by one mountain bike (31.09%). There has been a slight increase in the ownership of 1-2 bikes since the previous 2014 Survey.

Remaining response data can be seen in the table below;

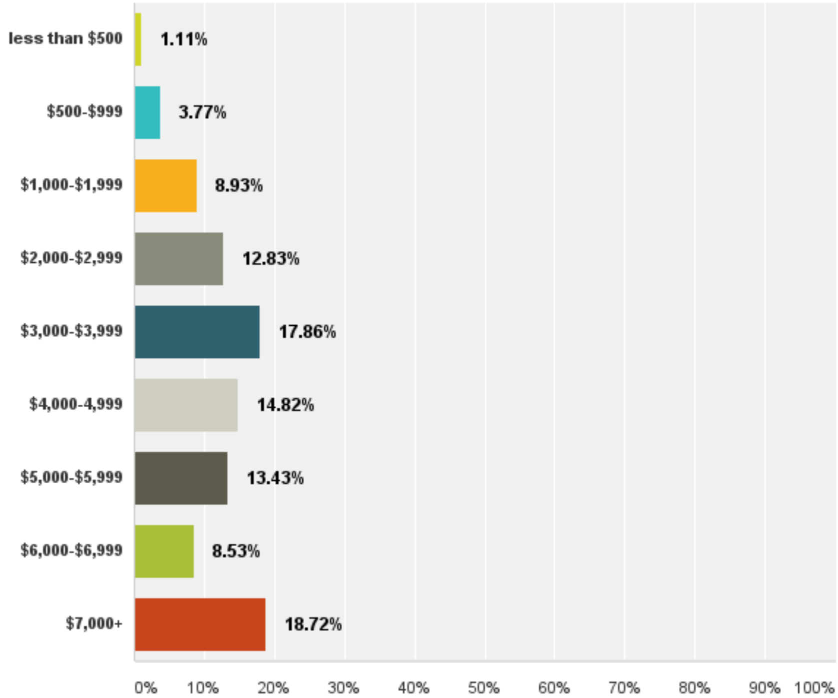


3.1.2 Most expensive mountain bike owned

2014	$3000-3999:	20.35% (584)	$2000-2999:	15.89% (456)
2016	$7000+:	18.72% (744) ↑	$3000-3999:	17.86% (710) ↓

Most respondents' most expensive bicycle has a value of $7,000+ (18.72%), followed by $3,000-3,999 (17.86%). The results differ significantly from the 2014 Survey as the most expensive bike owned category ($7000+) has surpassed the $3,000-3,999 range as the most common amongst the survey respondents.

Remaining response data can be seen in the table below;

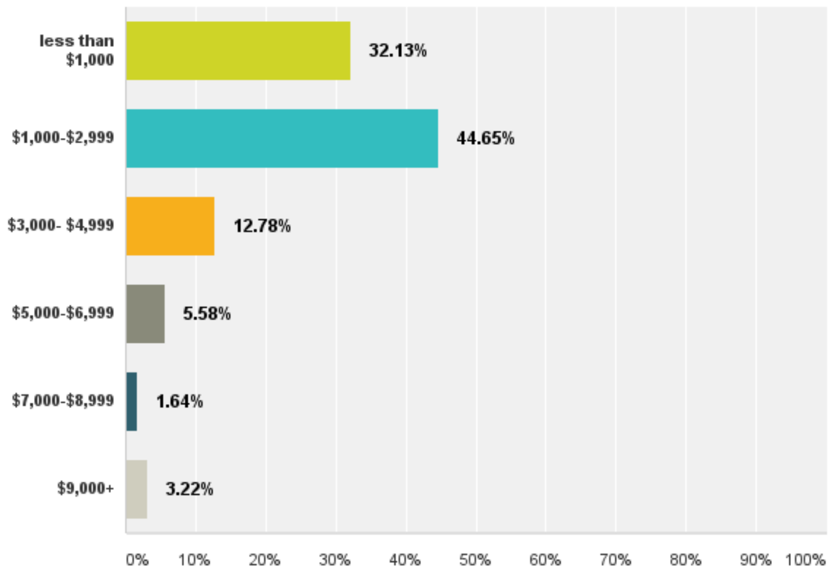


3.1.3 Annual spend on bikes and equipment

2014 $1000-2999: 43.98% (1261) < $1000: 32.26% (925)
2016 $1000-2999: 44.65% (1775) ↑ $3000-3999: 32.13% (1277) ↓

The majority of respondents spend an average of $1,000-2,999 on bicycles and equipment per year (44.65%), followed by an average spend of less than $1,000 (32.13%). The findings are similar to that of the previous 2014 Survey.

Remaining response data can be seen in the table below;



3.1.4 Types of bicycles owned

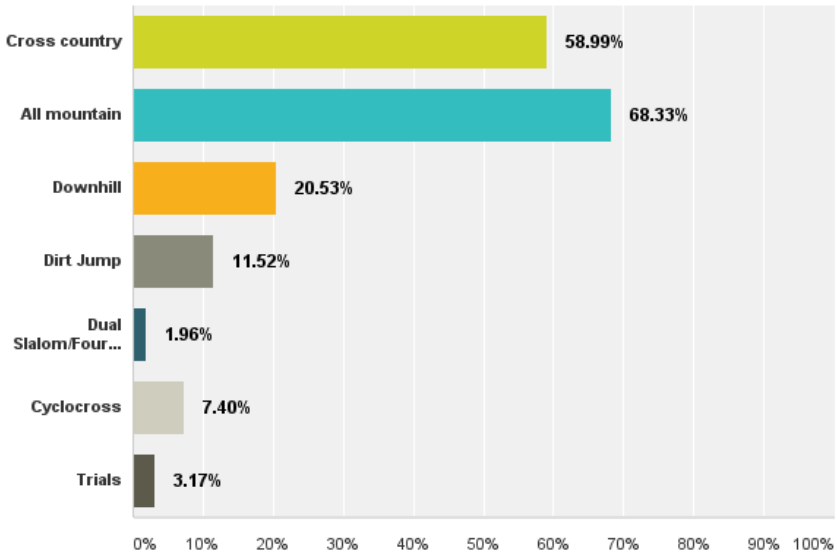
2014	XC:	69.20% (1975)	AM:	57.08% (1629)
2016	AM:	68.33% (2716) ↑	XC:	58.99% (2345) ↓

[XC = cross country; AM = all mountain]

The most common bike owned by respondents is all mountain / AM (68.33%) followed by cross country / XC (58.99%) and downhill bicycles (20.53%). The previously most common 'cross country' bicycle category in the 2014 Survey was surpassed by the all mountain bicycle this year.

Please Note: Respondents were able to select multiple options in this question. Open ended 'other' responses can be provided upon request.

Remaining response data can be seen in the table below;



3.1.5 Where bicycles and equipment are purchased

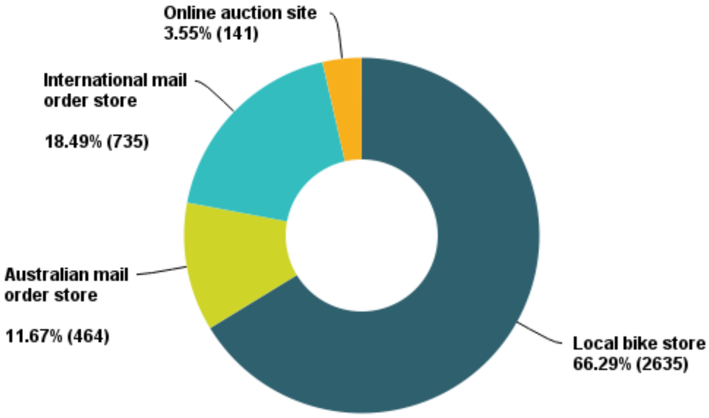
2014	LBS:	64.36% (1786)	International:	23.78% (660)
2016	LBS:	66.29% (2635) ↑	International:	18.49% (735) ↓

[LBS = local bike store; International = international mail order store]

The majority of respondents (66.29%) support their local bike stores by buying the majority of their bikes and equipment there. 18.49% of respondents purchase their bicycles and equipment at international mail order stores. The 2016 Survey highlighted a slight increase (+0.93%) in support of local bike stores as well as Australian mail order stores (+3.02%). There was a significant decrease (-5.29%) in sales from international mail order stores.

Please Note: Open ended 'other' responses can be provided upon request.

Remaining response data can be seen in the table below;



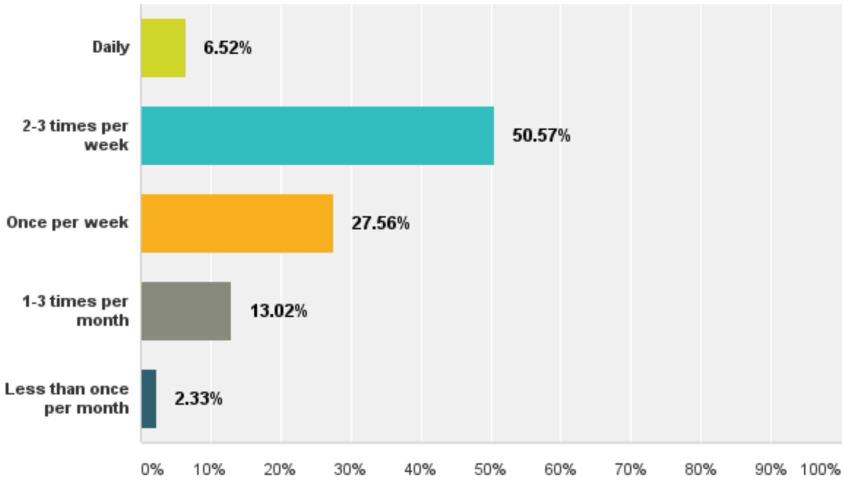
4 Riding preferences

4.1.1 Regularity of mountain bike riding

2014	2-3 / week:	52.92% (1505)	Once / week:	25.95% (738)
2016	2-3 / week:	50.57% (2000) ↓	Once / week:	27.56% (1090) ↑

Half of the respondents stated that on average they go for a mountain bike ride two to three times per week (50.57%), with more than a quarter of respondents (27.56%) stating that they ride their mountain bikes once per week. In comparison to the previous 2014 Survey, there was a slight decrease (-2.35%) in the two to three times per week category and an increase (+1.61%) in the once per week riding regularity.

Remaining response data can be seen in the table below;

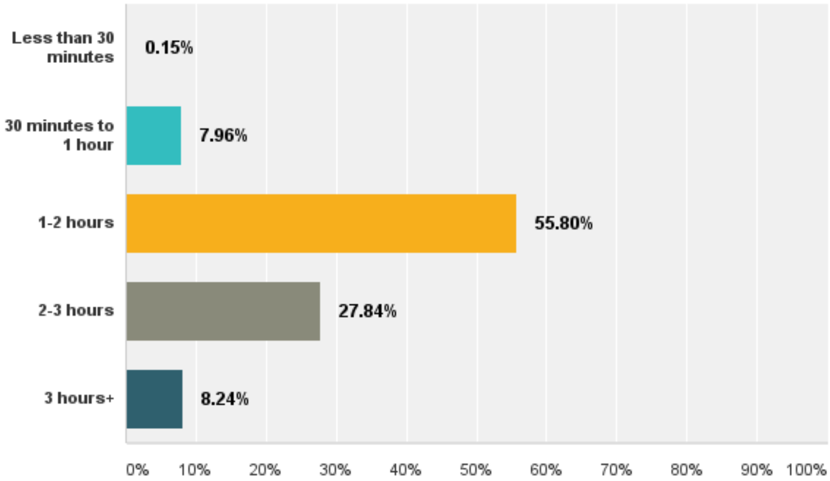


4.1.2 Average duration of mountain bike ride

2014	1-2 hours:	52.88% (1504)	2-3 hours:	31.29% (890)
2016	1-2 hours:	55.80% (2207) ↑	2-3 hours:	27.84% (1101) ↓

Over half of the respondents (55.80%) spend one to two hours on their typical mountain bike ride – a slight increase (+2.92%) in comparison to the 2014 Survey. More than a quarter (27.84%) stated that they ride for two to three hours per ride – a slight drop in numbers (-3.45%) compared with previous statistics.

Remaining response data can be seen in the table below;



4.1.3 Preferred riding styles

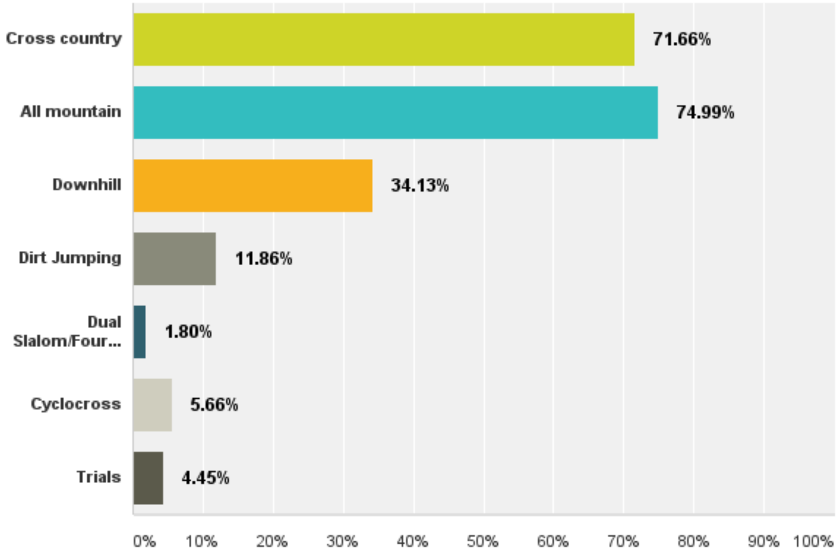
2014	XC/AM:	94.99% (2694)	DH:	28.07% (796)
2016	AM:	74.99% (2966)	XC:	71.66% (2834)

[XC = cross country; AM = all mountain; DH = downhill]

All mountain was the most preferred riding style identified by respondents (74.99%), followed by cross country (71.66%) and downhill (34.13%).

Please Note: An additional ‘all mountain’ riding style was implemented into the 2016 edition of the survey. This option was added to enable the survey to differentiate between cross country and all mountain riding styles – an option previously unavailable in the 2014 Survey. The Respondents were able to select multiple options for this question. Open ended ‘other’ responses can be provided upon request.

Remaining response data can be seen in the table below;



4.1.4 Most preferred/most common style of riding

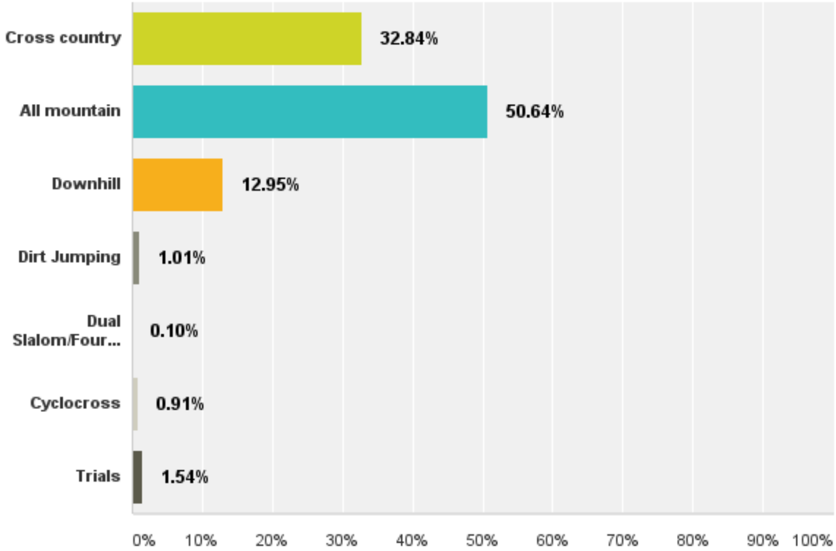
2014	XC/AM:	82.82% (2323)	DH:	14.64% (413)
2016	AM:	50.64% (2003)	XC:	32.84% (1299)

[XC = cross country; AM = all mountain; DH = downhill]

When asked to select one preferred/most common riding style, half of the respondents selected all mountain (50.64%), with cross country being the next most preferred/common (32.84%).

Please Note: An additional 'all mountain' riding style was implemented into the 2016 edition of the survey. This option was added to enable the survey to differentiate between cross country and all mountain riding styles – an option previously unavailable in the 2014 Survey. Open ended 'other' responses can be provided upon request.

Remaining response data can be seen in the table below;



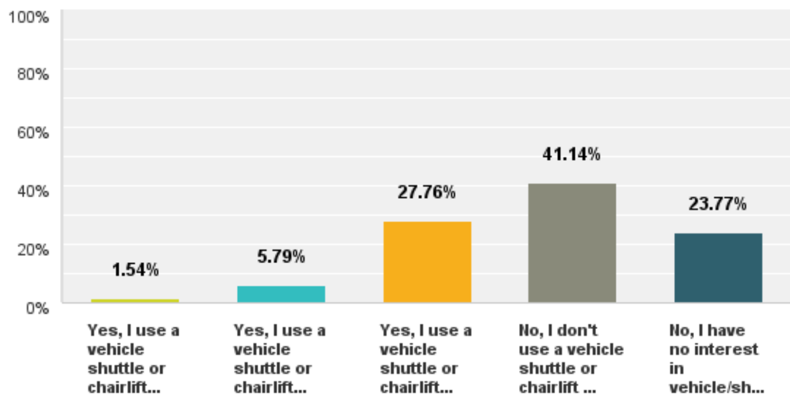
4.1.5 Vehicle shuttle use / chairlift accessible riding

2016 *No, I don't use a vehicle shuttle or chairlift but have an interest in these services.*
41.14% (1627)

Yes, I use a vehicle shuttle or chairlift service occasionally when I ride.
27.76% (1098)

A large proportion of respondents (41.14%) do not currently use vehicle shuttles / chairlifts when riding, but have an interest in these services. Over a quarter of respondents (27.76%) currently use a vehicle shuttle / chairlift service occasionally when they ride. 23.77% of respondents do not use any form of vehicle shuttle / chairlift services and are not interested in utilising these amenities.
Please Note: This was an entirely new question introduced to the 2016 Survey asking respondents the following question, "Do you currently use a vehicle shuttle/chairlift when riding?".

Remaining response data can be seen in the table below;



4.1.6 Bike skills course / clinic

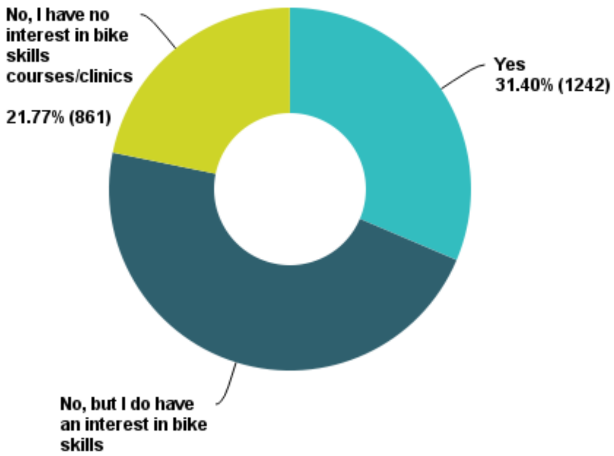
2016 *No, but I do have an interest in bike skills courses/clinics.*
46.83% (1852)

Yes.
31.40% (1242)

A large proportion of respondents (46.83%) have never participated in a bike skills course / clinic, but have an interest in these programs. 31.40% of respondents have attended a bike skills course / clinic.

Please Note: This was an entirely new question introduced to the 2016 Survey asking respondents the following question, "Have you ever completed a bike skills course or clinic?".

Remaining response data can be seen in the table below;



5 Mountain bike events

5.1.1 Mountain bike/cycling club membership

2014	Yes:	53.42% (1507)	No:	46.58% (1314)
2016	Yes:	55.40% (2187) ↑	No:	44.60% (1761) ↓

55.40% of respondents are members of a mountain bike/cycling club or organisation. There was a slight rise (+1.98%) in respondents that are affiliated with a mountain bike / cycling membership compared to the 2014 Survey.

5.1.2 Organised mountain bike race/event participation in previous 12 months

2014	Yes:	65.30% (1844)	No:	34.70% (980)
2016	Yes:	55.40% (2187) ↑	No:	44.60% (1761) ↓

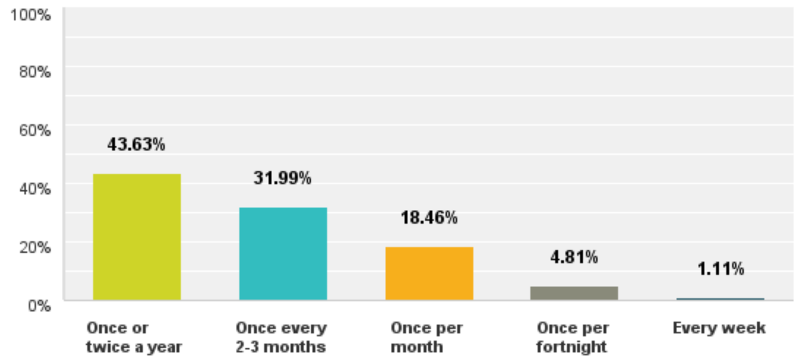
Over half of the respondents (55.40%) stated that they had participated in an organised mountain bike race or event in the past twelve months. There was a noticeable decline (9.9%) in the participation of organised mountain bike races / events when compared with the previous 2014 Survey.

5.1.3 Regularity of mountain bike race/event participation

2014	1-2 / year:	39.72% (740)	1 / 2-3mths:	33.49% (624)
2016	1-2 / year:	43.63% (1061) ↑	1 / 2-3mths:	31.99% (778) ↓

Of those respondents who stated that they had participated in an organised race or event in the past twelve months, 43.63% stated that they typically participate in races/events once or twice a year, with 31.99% participating once every two to three months. There was a slight increase (+3.91%) in the 'once or twice a year' category compared to the previous 2014 Survey.

Remaining response data can be seen in the table below;



5.1.4 Most common type of mountain bike event/race participated in

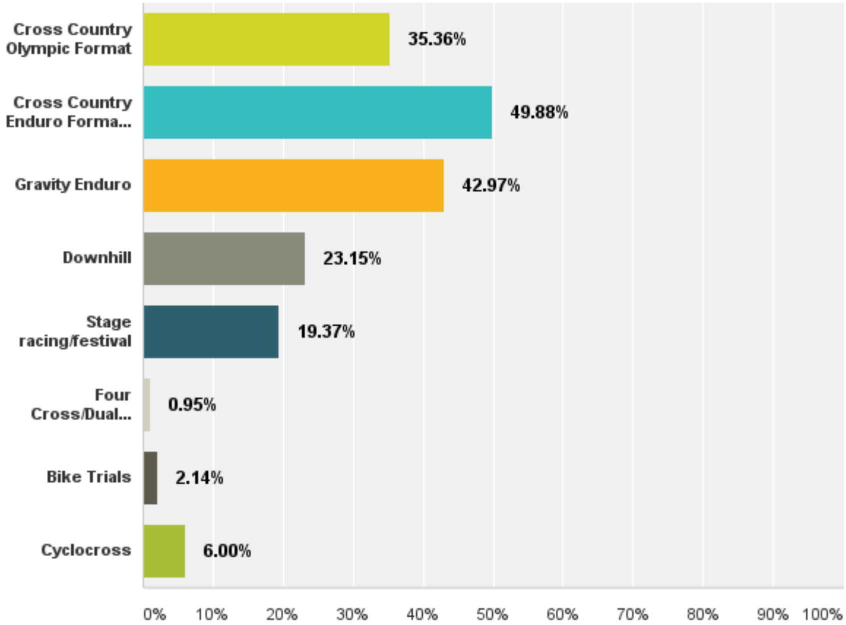
2014	XC/Enduro:	62.19% (1130)	XCO:	39.13% (711)
2016	XC/Enduro:	49.88% (1213) ↓	Gravity Enduro:	42.97% (778)

[XC = cross country; XCO = cross country Olympic format]

Cross country enduro format races/events were identified as being the most common for participation, with 49.88% of respondents stating that this was the type of event that they most typically participated in. There was a noticeable decline (-12.31%) in the participation of cross country enduro format races/events when compared with the previous 2014 Survey. The drop in numbers can (in part) be attributed to the addition of a new category of mountain bike event/race ('Stage racing / festival') added to the 2016 Survey. Notwithstanding, substantial growth (+13.91%) was evident in the gravity enduro races/events.

Please Note: An additional 'stage racing/festival' race/event category was implemented into the 2016 edition of the survey.

Remaining response data can be seen in the table below;



5.1.5 Preferred type of mountain bike race/event

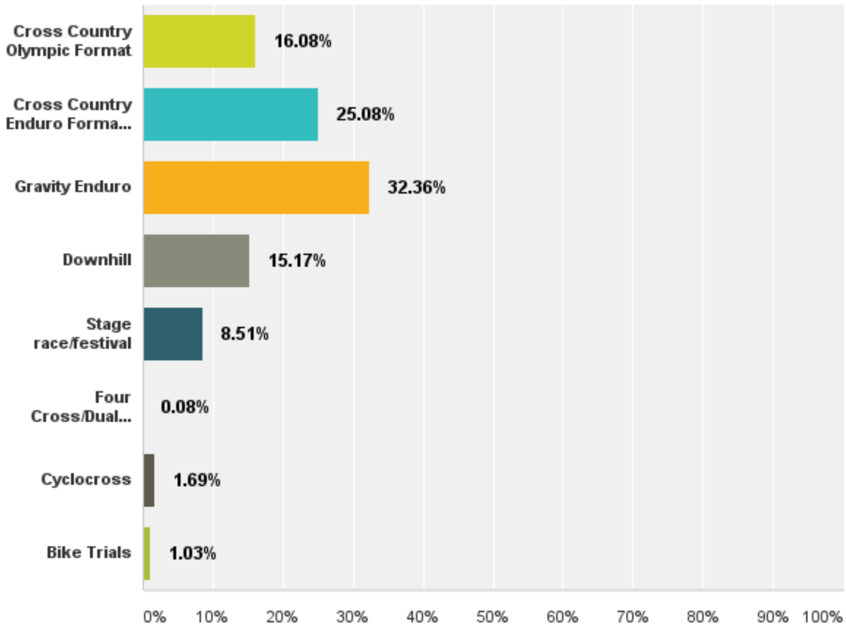
2014	XC Enduro:	43.12% (783)	Gravity Enduro:	22.80% (414)
2016	Gravity Enduro:	32.36% (787) ↑	XC Enduro:	25.08% (610) ↓

[XC = cross country]

The most preferred type of mountain bike race/event was Gravity Enduro (32.36%), followed by Cross Country Enduro Format (25.08%) and Cross Country Olympic format (16.08%). There was a distinct decline (-18.04%) in the number of respondents who listed Cross Country Enduro as their preferred race/event. This can (in part) be attributed to the addition of a new category of mountain bike event/race ('Stage racing / festival') added to the 2016 Survey. In addition to this, the evident rise in Gravity Enduro races/events (+9.56%) as the preferred option from respondents have contributed to this decrease.

Please Note: An additional 'stage racing/festival' race/event category was implemented into the 2016 edition of the survey.

Remaining response data can be seen in the table below;



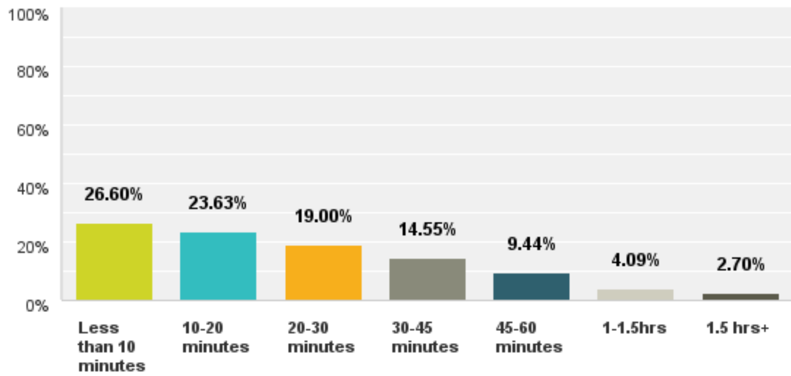
6 Mountain bike travel preferences

6.1.1 Travel to local trails

2014	< 10mins:	23.86% (674)	10-20mins:	22.65% (640)
2016	< 10mins:	26.60% (1046) ↑	10-20mins:	23.63% (929) ↑

26.60% of respondents stated that they travel for ten minutes to what they consider to be their 'local trails'. 23.63% travel for ten to twenty minutes, and 19% travel for twenty to thirty minutes.

Remaining response data can be seen in the table below;

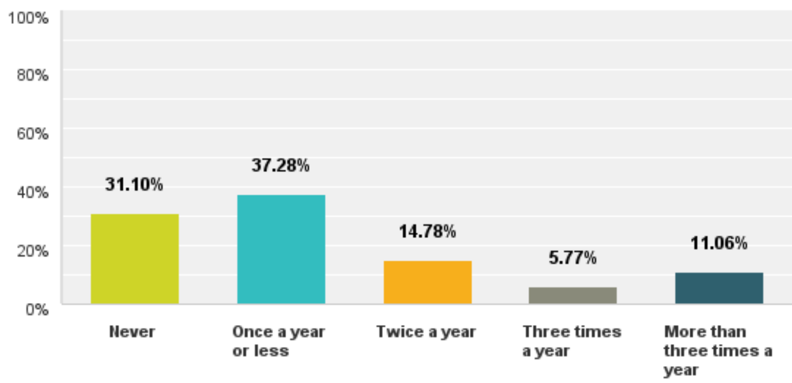


6.1.2 Travel to another Australian state to engage in mountain biking

2014	Never:	39.83% (1124)	1 or less / year:	35.72% (1008)
2016	Never:	31.10% (1223) ↓	1 or less / year:	37.28% (1466) ↑

When asked how often they travel to another state in Australia to specifically engage in mountain bike riding, 37.28% stated that they travel to another state once a year. This differs greatly to the 2014 Survey findings, where the leading statistic was that 39.83% of the respondents did not travel outside their home state specifically for mountain biking. In 2016, there was a significant decrease (-8.73%) in the number of respondents that have never set foot outside their home state for the sole purpose of mountain biking.

Remaining response data can be seen in the table below;

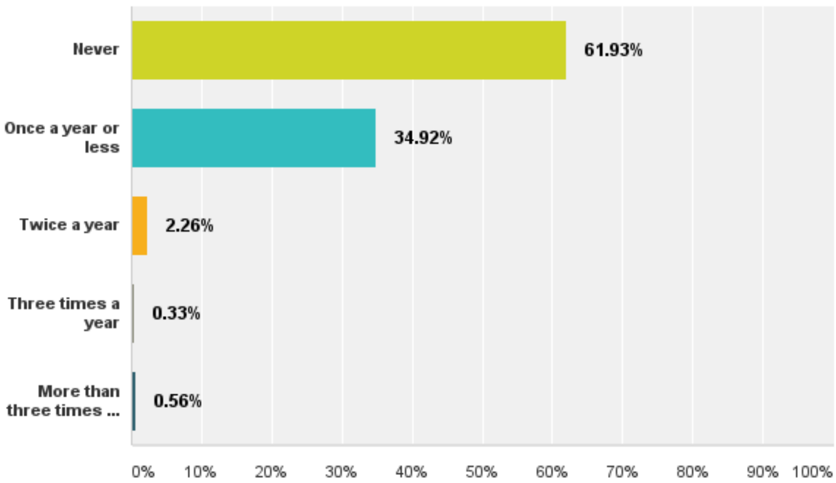


6.1.3 Travel to another country to engage in mountain biking

2014	Never:	65.99% (1861)	1-2 / year:	30.64% (864)
2016	Never:	61.93% (2435) ↓	1-2 / year:	34.92% (1373) ↑

Most respondents (61.93%) have not travelled to another country to specifically engage in mountain bike riding. 34.92% of respondents stated that they travel overseas to engage in mountain bike riding once a year or less.

Remaining response data can be seen in the table below;



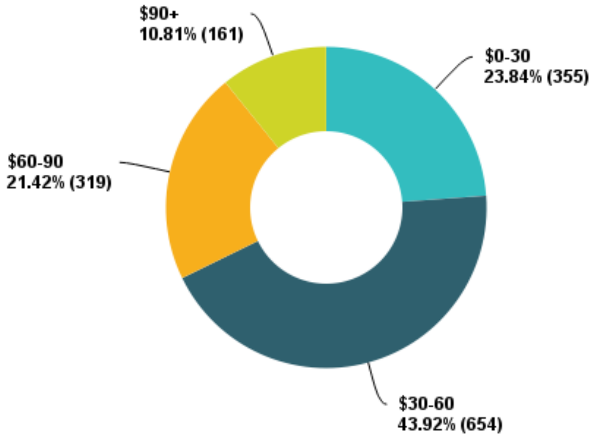
6.1.4 Average daily expenditure on food and beverage at riding destinations (excluding accommodation)

2016	$30-60:	43.92% (654)	$0-30:	23.84% (355)

Most respondents (43.92%) spent between $30-60 on food and drink when traveling to a destination to ride. 23.84% of respondents stated that they spent between $0-30 on average, while 21.42% spent $60-90 at riding destinations.

Please Note: This was an entirely new question introduced to the 2016 Survey asking respondents the following question, “When traveling to a destination to ride what would be your average daily spend on things like food and drink (excluding accommodation)?”.

Remaining response data can be seen in the table below;



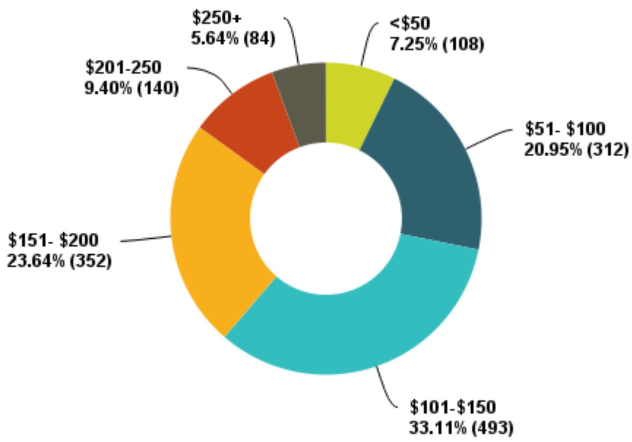
6.1.5 Average expenditure on overnight accommodation and an evening meal at riding destinations

2016 $101-150: 33.11% (493) $151-200: 23.64% (352)

Most respondents (33.11%) spent between $101-150 on accommodation and an evening meal when traveling to a destination to ride. 23.64% of respondents stated that they spent between $151-200 on average, while 20.95% spent $51-100 when staying overnight at a riding destination.

Please Note: This was an entirely new question introduced to the 2016 Survey asking respondents the following question, "When traveling to a destination to ride and stay overnight what would be your average spend on accommodation and an evening meal?".

Remaining response data can be seen in the table below;



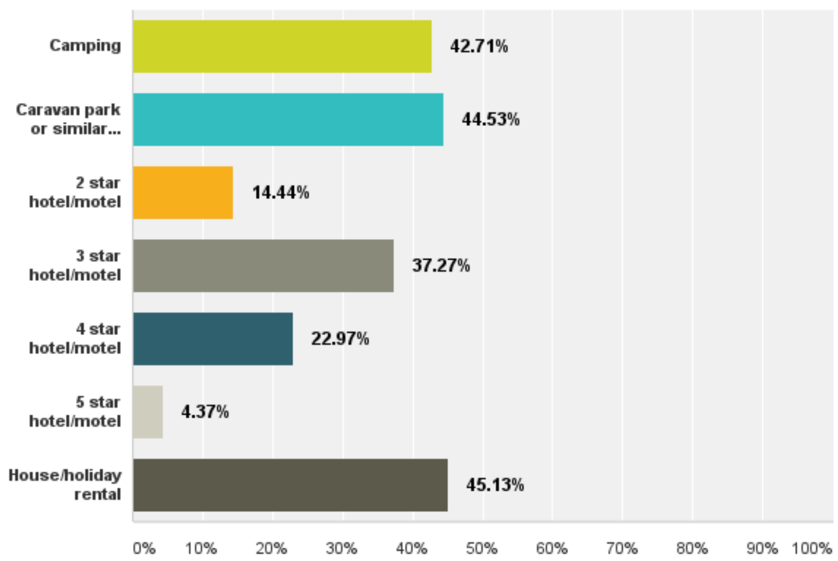
6.1.6 Most common style of accommodation

2016
House/Holiday Rental: 45.13% (672)
Caravan Park or Similar: 44.53% (663)

The most common style of accommodation was a house/holiday rental, with 45.13% of respondents stating that this was their typical overnight accommodation while away at a mountain bike destination. 44.53% of respondents stated that they typically stayed in a caravan park or similar, while 42.71% of respondents typically chose to camp.

Please Note: This was an entirely new question introduced to the 2016 Survey asking respondents the following question, "What style of accommodation do you typically stay in when staying at a mountain bike destination overnight?". The Respondents were able to select multiple options for this question.

Remaining response data can be seen in the table below;



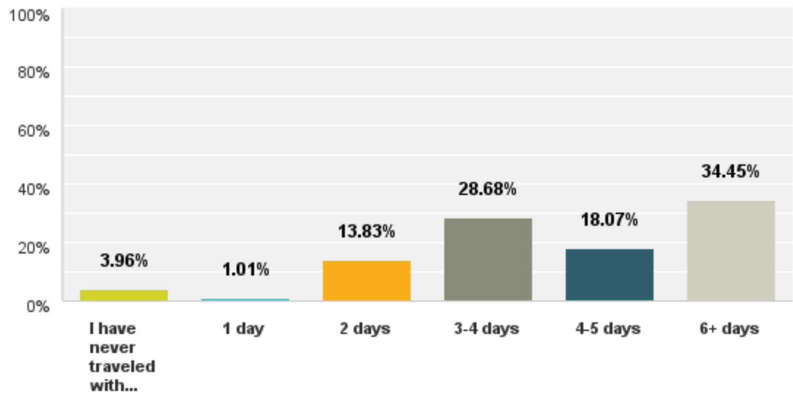
6.1.7 Average duration of mountain bike specific holidays

2016
6+ Days: 34.45% (513) 3-4 Days: 28.68% (427)

When mountain biking was the primary purpose of the trip, 34.45% of respondents stated that the average length of their trip was typically six days or more. 28.68% of respondents stated that their average holiday length was between 3-4 days.

Please Note: This was an entirely new question introduced to the 2016 Survey asking respondents the following question, "How long is your average holiday length when mountain biking is the primary purpose of your trip?".

Remaining response data can be seen in the table below;



7 Mountain bike trail preferences

7.1.1 Style of trail that is most enjoyed

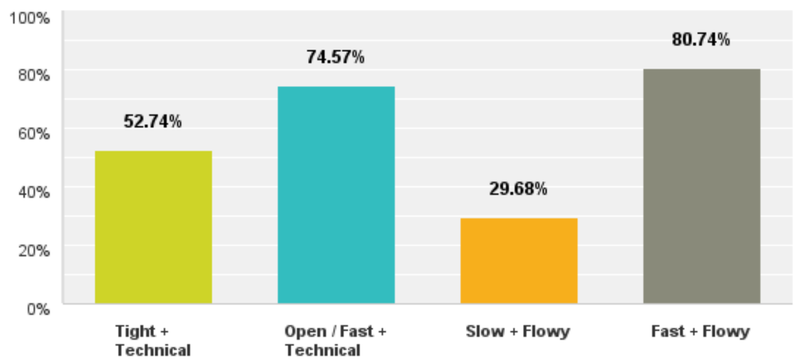
2014	Fast + Flowy:	70.52% (1945)
	Open/Fast + Technical:	69.54% (1918)

2016	Fast + Flowy:	80.74% (3036) ↑
	Open/Fast + Technical:	74.57% (1373) ↑

The majority of respondents stated that they most enjoy ‘fast and flowy’ trails (80.74%), followed by ‘open/fast and technical trails’ (74.57%). Compared to the findings of the 2014 Survey, there was a noticeable increase in the respondents that indicated that these two trail styles were the most enjoyable; Fast + Flowy (+10.22%) and Open/Fast + Technical (+5.03%).

Please Note: Respondents could choose more than one option.

Remaining response data can be seen in the table below;



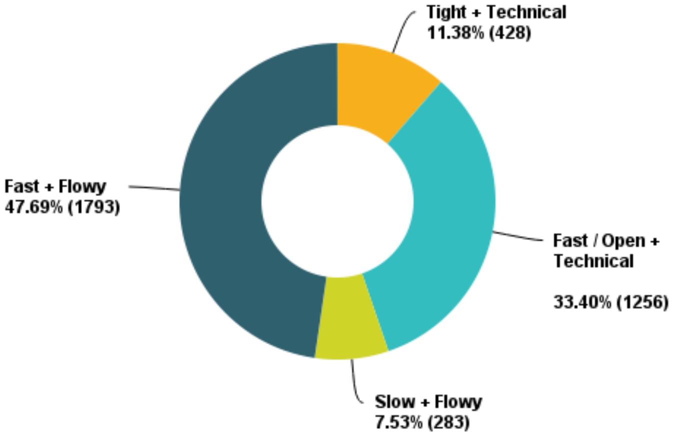
7.1.2 Most preferred trail experience

2014	Fast + Flowy:	45.01% (1240)
	Open/Fast + Technical:	36.04% (993)

2016	Fast + Flowy:	47.69% (1793) ↑
	Open/Fast + Technical:	33.40% (1256) ↓

When asked to identify their most preferred trail type/experience, the majority of respondents stated ‘fast and flowy’ as their preference (47.69%). 33.40% most prefer ‘fast/open and technical’. The findings were similar to that of the previous 2014 Survey.

Remaining response data can be seen in the table below;

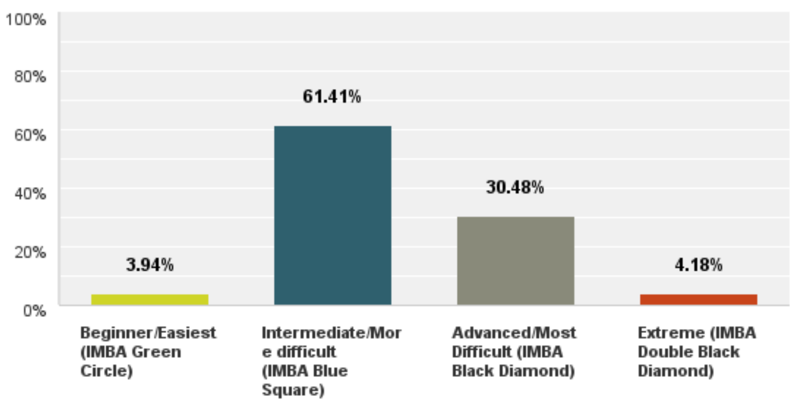


7.1.3 Most common trail difficulty ridden

2014	Intermediate/More Difficult (IMBA Blue Square):	64.04% (1761)
	Advanced/Most Difficult (IMBA Black Diamond):	27.89% (767)
2016	Intermediate/More Difficult (IMBA Blue Square):	61.41% (2309) ↓
	Advanced/Most Difficult (IMBA Black Diamond):	30.48% (1146) ↑

The most common trail grade ridden by respondents was Intermediate/More difficult (IMBA Blue Square), with 61.41% stating this was the grade of trail that they typically rode most often. There was a slight decrease (-2.63%) in this category compared to the 2014 Survey. On the other hand, there was a small increase (+2.59%) in the respondents that chose Advanced/Most Difficult (IMBA Black Diamond) as their most common grade of difficultly trail ridden.

Remaining response data can be seen in the table below;



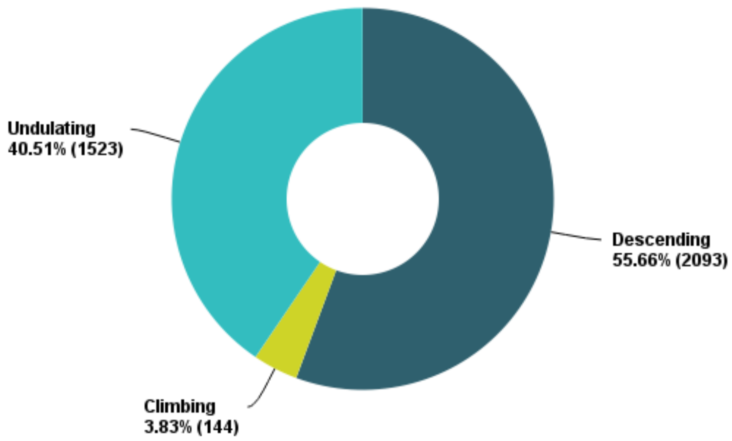
7.1.4 Most preferred aspect of trails

2016 Descending: 55.66% (2093) Undulating: 40.51% (1523)

When asked to identify their most preferred aspect of trails, the majority of respondents chose 'descending' as their preference (55.66%) while 40.51% most prefer a trail that is 'undulating'.

Please Note: This was an entirely new question introduced to the 2016 Survey asking respondents the following question, "What is your preferred aspect of trails?".

Remaining response data can be seen in the table below;

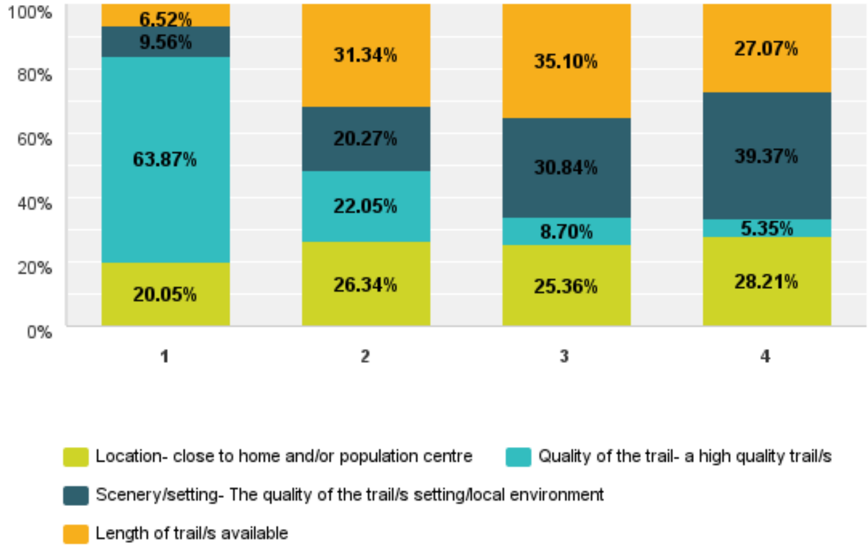


7.1.5 Most important factor when judging the attractiveness of mountain bike trail/facility

2014	Quality of the trail – a high quality trail/s:	62.01% (1696)
	Location close to home and/or population centre:	27.89% (767)
2016	Quality of the trail – a high quality trail/s:	63.87% (2399) ↑
	Location close to home and/or population centre:	20.05% (753) ↓

Respondents were asked to rank the factors that are most important to them, when judging the attractiveness of a mountain bike trail or facility. 'Quality of the trail – a high quality trail/s' was identified as being the most important factor, with 63.87% of respondents ranking it as their number one/most preferred factor. The location of the trail/facility to home and/or a population centre was the next most important factor, with 20.05% of respondents indicating this in their response – a marked decline (-7.84%) from the 2014 Survey results.

Remaining response data can be seen in the table below;



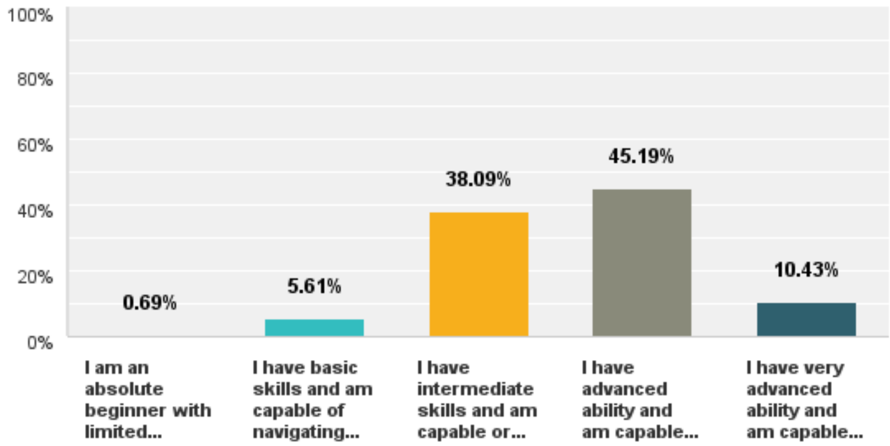
7.1.6 Current ability on a mountain bike

2014 *"I have advanced ability and am capable of riding steep and challenging trail with obstacles such as jumps and drops"*
45.43% (1254)
"I have intermediate skills and am capable of navigating more demanding trails and obstacles"
39.57% (1092)

2016 *"I have advanced ability and am capable of riding steep and challenging trail with obstacles such as jumps and drops"*
45.19% (1699) ↓
"I have intermediate skills and am capable of navigating more demanding trails and obstacles"
38.09% (1432) ↓

The majority of respondents (45.19%) described their own ability on a mountain bike as "I have advanced ability and am capable of riding steep and challenging trails with obstacles such as jumps and drops". A significant proportion (38.09%) of the remaining respondents categorised their ability on a mountain bike as "I have intermediate skills and am capable of navigating more demanding trails and obstacles". The findings were similar to the 2014 Survey results.

Remaining response data can be seen in the table below;



8 Trail care participation

8.1.1 Participation in official/sanctioned trail care/construction activities

2014	No:	70.06% (1928)	Yes:	29.94% (824)
2016	No:	64.68% (2432) ↓	Yes:	35.32% (1328) ↑

The majority of respondents (64.68%) stated that they do not currently participate in official or sanctioned volunteer trail care and/or construction activities. There was an increase (+5.38%) of respondents that noted ‘yes’ to this question when compared with the previous 2014 Survey results.

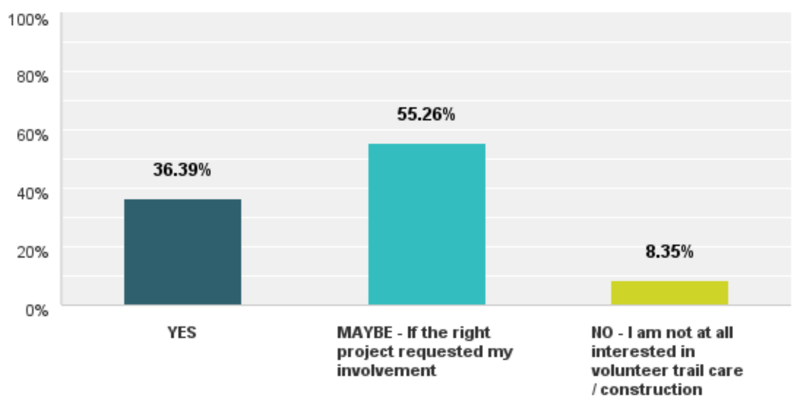
Response data can be seen in the table below;

8.1.2 Interest in future involvement in volunteer trail care/construction activities

2014	Maybe:	49.27% (1039)	Yes:	44.76% (944)
2016	Maybe:	55.26% (1344) ↑	Yes:	36.39% (885) ↓

When asked if they would be interested in volunteering in a trail care/construction activity, the majority (55.26%) stated ‘maybe – if the right project requested my involvement’. A further 36.39% stated that they would be interested in future volunteer involvement.

Remaining response data can be seen in the table below;



9 Satisfaction of access to quality mountain bike trails/facilities

9.1.1 Level of satisfaction towards access to quality local mountain biking trails

2014	Satisfied:	36.09% (996)	Average:	29.60% (817)
2016	Satisfied:	36.41% (1369) ↑	Average:	27.93% (1050) ↓

When asked to rate their level of satisfaction in regards to having local access to quality mountain bike trail experiences, the majority of respondents expressed that they were 'satisfied' (36.41%) while 27.93% rated their satisfaction as 'average'. These results were similar to the findings of the previous 2014 Survey.

Please Note: This was an entirely new question introduced to the 2016 Survey asking respondents the following question, "How would you rate your level of satisfaction regarding the level of access you currently have to quality mountain bike trail experiences in your local area?".

Remaining response data can be seen in the table below;