

Mountain biking: an opportunity to enhance economic development in Australian rural areas?

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Abstract

Mountain biking is assumed to have originated in California as a distinct recreational activity in the 1970s. By 2005, approximately 10 million Americans participated, and in 2006-2007 mountain/hybrid bikes represented 44% unit sales through speciality bicycle retailers. Subsequently, the popularity of the sport has continued on an upward trajectory. Such upward trend has also occurred in Australia. In other countries participation in mountain biking also continues to grow, and the International Mountain Biking Association (IMBA) is now represented in 17 countries including the United States of America (US), Australia, Canada, United Kingdom (UK), Spain, and Mexico. Demand for purpose-built facilities such as single track trails, and bike parks for freeriding/trials are also increasing internationally. For example, in US locations (e.g., Moab, Utah; Fruita, Colorado) hundreds of kilometres of single track

mountain bike trails are available. In Canada, alpine resorts (e.g., Whistler Blackcomb) offer over 200 km of trails for mountain biking and, for some resorts, summer mountain biking provides 75% of the winter snow recreation revenue. The largest mountain biking resort complex in the UK (7Stanes) has around 600 km of single track trails of varying levels from 'easy' to 'severe', and mountain biking has had a marked economic impact on the economically depressed areas where it has been introduced. In Australia and New Zealand, many state, regional or local governments have recognised the economic potential of destination-based cycle tourism and are profitably promoting long-distance cycle routes such as Victoria's 100 km 'Murray to the Mountains' rail trail. Albury-Wodonga Region offers a wide range of potential destinations for bikers at all levels of expertise that encompass mountains, country lanes, history, wineries, agricultural landscapes, and the weir. Based on the success of mountain biking ventures internationally, and to date in Australia, there is the potential for substantial additional economic gains in rural regions of Australia from this activity. In this paper we provide a background on existing international successes, and use the Albury-Wodonga Region as a case study to discuss potential additional opportunities for economically successful mountain biking in Regional Australia.

Keywords: Recreation management; Destination cycling; Off-road biking; Visitor impacts; Adventure recreation; Cycle tourism

Introduction

The business literature is replete with examples of industries that have failed to respond to changing trends and have lost their competitive advantage. Others adapt and often grow economically stronger as a consequence (Burgin and Hardiman, 2014). For example, within the Australian Regional tourist industry, the Blue Mountains has failed to maintain historic levels of tourism in the recent past. Despite the Greater Sydney population (major pool of tourists for the Region) growing from 4.0 to 4.6 million between 1999 and 2011, nature visitation (historically the major draw to the area) declined dramatically during the period. For example, the number of domestic day nature visits declined by 56.2% during 1998-2006 and although showing some subsequent recovery, the numbers were 36.7% below 1998 figures in 2012. Domestic overnight nature visits also declined, by 60.5% during 1998-2004, and had only recovered to 64.4% of 1998 levels by 2012. In contrast, the Hunter Valley (Central New South Wales) and the Cradle Coast (Tasmania) have both captured a greater segment of the tourism market over the same period (Hardiman and Burgin, in review).

To develop a strong tourism destination requires the building of destination brand identity at different scales (Dredge and Jenkins, 2003). To maintain competitive advantage requires being alert to emerging market trends and responding appropriately, especially in terms of new products and services offered and communicating such changes clearly and impactfully to target customer audiences (Burgin and Hardiman, 2014). Here we provide a brief background to a recreational activity increasingly popular across many countries; mountain biking. This recreational activity is also successfully emerging as a popular pastime in Regional Australia. Mountain biking, as a destination-based tourism experience, may be an

opportunity that could be further developed to enhance regional tourism, and Australia more generally, as a tourism biking destination.

The emergence of mountain biking

The origin of mountain biking is considered to have occurred in the 1970s in California's Marin County in the United States of America (US; White et al., 2006). It is now estimated that 35.6 million people over the age of six cycled at least six times in 2013, and mountain biking has become one of the top 10 recreational activities in the US. By 2013, some 15 – 20 million bicycles were sold annually in the US with the total retail bicycle business estimated to have been worth US\$7.5 billion [AUD\$8.05 billion] in that year (NBDA, 2013).

In other countries, such as Canada (Koepke, 2005), New Zealand (Cessford, 1995, 2003), Portugal (Campelo and Mendes, 2014; de Oliveira and Mendes, 2014), and the United Kingdom (UK; Gajda, 2008; TRC, 2005), participation in mountain biking continues to grow (Leung et al., 2014). For example, more than two million bikes were sold in the UK annually, and 5.7% of the population was estimated to participate regularly in mountain biking in 2005 (TRC, 2005). Other nations in which mountain biking is popular include Germany (3.5 million mountain bikers of 7.2 million recreational cyclists), and Switzerland and Austria where the total number of mountain bikers was estimated at 800,000 in 2005 (Koepke, 2005).

The first purpose-built, forest-based mountain bike venue in the UK was developed at Coed-y-Brenin (North Wales). It opened in the mid-1990s and its success quickly sparked similar developments elsewhere in the country. In 2006 and

2007, mountain bike tourists spent an estimated annual average of £24 [AUD\$43.2] million in Wales (Mountainbiking Wales, undated).

Today there are 42 purpose-built publicly-owned mountain biking/forest cycling Centres/Bases throughout the UK, most operated by the Forestry Commission of Great Britain; 15 in Scotland (Greenpeace, 2010), 15 in Wales (FCW, 2010; Mountainbiking Wales, undated); and 12 in England with an additional five planned or under construction there (FCS, undated). Throughout the country these venues, together with other cycle ways, provide more than 3,000 km of tracks on national forest estate lands (TRC, 2005). These include ‘Centres’ dedicated to single site mountain biking locations with a visitor centre and support facilities (e.g., café, bike repair shop, showers and toilets, trail guides), offering multiple-way, marked trails of varying difficulty. Alternatively, ‘Bases’ host several-way marked or mapped trails, together with independently operated support facilities (e.g., accommodation, restaurants/cafés, bike sale and/or repair shop - Tinch, 2010). Typically located in sparsely populated, poorer rural areas, their development has provided employment and, therefore, substantial economic benefits to local regions (Chi and Kriwoken, 2003; TRC, 2005).

Although use of the trails is free in the US and apparently elsewhere, supporting facilities are provided on a commercial basis. Public - private sector partnerships, led by the respective regional forestry commissions and comprising local governments, national and regional tourism bodies, together with local private enterprises are the core of such initiatives. Although all centres have proved successful, those in Scotland have particularly prospered. For example, the Nevis

Range and Leanachan Forest venues (Fort William, Scotland) hosted the annual World Cup Mountain Bike Series during 2002-2005 and again in 2010. In 2007 they also hosted the Mountain Bike World Championships with international competition for four mountain bike disciplines (Cross-Country, Downhill, Trials, 4-Cross). The Scottish town of Dumfries hosted the 2010 World Mountain Bike Conference and the mountain biking course at the Cathkin Braes Country Park, purpose-built just outside Glasgow by the City Council, attracted entrants from 18 different countries in the 2014 Commonwealth Games (Glasgow City Council, undated).

The largest of UK's mountain biking venues is the 7Stanes in Southern Scotland (FCS, undated). Opened in 2001, this multi-agency, seven-centre network is a world-class mountain biking venue that attracts domestic and international visitors. Currently nearly 600 km of single track trails of varying levels from 'easy' to 'severe' are offered. The 'difficult' trails are most popular. There are also Action Trail Areas for freestyle enthusiasts, and additional non-way marked and ungraded forest trails (TRC, 2005; TRC/EKOS, 2007). Forty-nine percent of visitors are 'intermediate' riders, 30% 'advanced', and 8% 'beginners' (TRC/EKOS, 2007).

7Stanes commenced by targeting highly experienced mountain bike riders as 'early adopters'. At that stage the focus was on 'product' (e.g., trail building, infrastructure development). Subsequently, the strategy has been to widened the user base, attract new users into biking for recreation, and make cycling more accessible socially, especially to females, families, schools, and older visitors. This equates to the development of a true mass market tourism/recreation product. However, in addition to its popularity with biking enthusiasts, substantial economic benefits have been delivered to a predominantly rural region that has traditionally suffered from high unemployment (TRC, 2005). The initiative has been a success. For example, in

2007, 7Stanes attracted an estimated 395,000 visitors (increased from 172,000 in 2004), making it one of the 20 most popular tourist attractions in Scotland. Some 43% of visitors originate from within Scotland, 32% from elsewhere in the UK, and 5% from overseas. For 78% of visitors, 7Stanes was their primary reason for visiting the Region and more than one-third stayed at least overnight (up from 25% in 2004). The project's net economic benefits were estimated to be £9.18 million [AUS\$16.32] in tourism expenditure, creation of 212 full time equivalent jobs, and £3.72 million [AUS\$6.61] gross value added to the regional economy (TRC/EKOS, 2007).

Cycle tourism in Scotland more generally is now widely recognised as a strategic tourism drawcard. In 2012, 17 cycle-related events in Scotland involved an estimated 33,409 participants and visitors. This generated an estimated economic income (directly and indirectly) for the Region of £5.6 million [AUS\$10.1]. Total monetised value of leisure cycle tourism in Scotland was estimated to be between £117.2 [AUD\$211] and £239 [AUS\$430] million per annum (depending on methodology and data used), with Annual Gross Value Added income estimated to be £58.5 (AUD\$105.3) million. (Zovko, 2013).

Current status of recreational cycling

The International Mountain Biking Association is now represented in 17 countries including the US, UK, Australia, Canada, Italy, Mexico, Spain, and the Netherlands, and their code of conduct is considered universal (IMBA, 2013).

As with many other forms of adventure recreation (e.g., snow skiing which, for example, has morphed into snowboarding and paraskiing), mountain biking has

morphed into new forms in parallel with growth in participation. The traditional form of cross-country/recreational biking, rides typically last a few hours, and riders use lightweight bicycles. The emphasis for such riders is relaxation and exercise (IMBA, 2013). They often seek single-track trails where riders are segregated from cars and can enjoy a close connection with nature (Koepke, 2005). Although cross-country/recreational riding is still the most popular form of the sport (89% US, 97% UK), more physically challenging, extreme derivatives such as downhill (18% US, 22.2% UK), freeriding (23% US, 21.2% UK), and trials (14% US, 8.1% UK) are growing in popularity (Cessford, 1995; Gajda, 2008; Green, 2003; Koepke, 2005). Downhill riders descend steep, rough terrain at high speed using heavy, specialist bikes with long-travel suspension, and are often transported to the top of the (usually short) runs by ski lifts, 4WD vehicles or helicopter (Cessford, 1995; TRC, 2005). In free-riding (cf. North Shore), the focus is on technical skills needed to handle obstacles such as elevated, narrow wooden broadways, log rides, ladder bridges and teeter-totters, usually on purpose-built circuits (Cessford, 1995; Koepke, 2005; Leung et al., 2014).

Although the percentage of bikes used for off-road riding, and frequency of use for such activities is not known, available data suggest that mountain biking is expanding globally. Based on the gross difference between the number of formally built tracks and informal trails in peri-urban areas and data obtained from self-reporting web sources (e.g., Australia - Ballantyne and Pickering 2014; Wolf et al., 2014; Portugal - Campelo and Mendes, 2014; de Oliveira and Mendes, 2014; Mendes et al., 2014), it appears that the demand of tracks for bikers is probably at least an order of magnitude greater than recognised by local authorities.

Recreational cycling in Australasia

Australasia is following the world trend. For example, New Zealand is a strong competitor in mountain biking and cycle tourism generally, and the potential economic benefits have clearly been identified by the authorities. For example, the New Zealand government has developed a Cycle Trail Initiative with the stated aim of developing a world-class cycle tourism network (Angus and Associates, 2013). As part of this initiative, New Zealand is actively developing 'rail trail' products, including the 150 km Otago Central Rail Trail. Annually, between 10,000 and 12,000 visitors complete the trail, and 20,000 to 30,000 visitors ride (or walk) at least one section of the trail annually (SRT, 2009; The Riesling Trail, undated). The recently constructed 82 km Hauraki Rail Trail, averaged approximately 7,000 cyclists per month in early 2013 (Hauraki Rail Trail, undated).

Research on four new bike trails in New Zealand, including the Hauraki Rail Trail, approximately seven months after their opening revealed that the average in-region expenditure per domestic (international) visitor per trip ranged from NZ\$171 [AUS\$154.0] / NZ\$127 [AUS\$114.4] to NZ\$637 [AUS\$574.0] / NZ\$948 [AUS\$854.3] and there was a respective per day regional expenditure of NZ\$133 [AUS\$114.9]; (NZ\$135 [AUS\$ 121.7] to NZ\$166 [AUS\$149.6] / NZ\$235 [AUS\$211.8]). These figures, applied to visitor numbers, suggested an estimated seasonal (December-March) per trail direct Regional economic contribution to the economy that ranged from NZ\$254,000 [AUS\$220.8] to NZ\$3,699,000 [AUS\$3,699,000] (Angus and Associates, 2013).

In Australia, the number of cyclists grew by 15.3% between 2001 and 2004 (Faulks et al., 2008), and of the 753,843 bikes sold in 2004, 70% were mountain bikes (Bradshaw, 2006). Biking tourism continues to be a growing market in Australia. For example, in 2012 - 2013, approximately 1.3 million domestic overnight visitors and over 1 million day visitors participated in cycling during their trip, representing 21% and 33% growth respectively from 2005 - 2006, with Victoria, New South Wales and Queensland being the most popular destinations (TRA, 2013). Cycle tourism is also becoming a well-defined product, and key travel motivator.

In recognition of the increasing demand, many State and Regional governments, especially in Victoria and South Australia, have developed strategic plans to guide and support mountain biking development with investment in trails and associated products. Many of the associated initiatives are capitalising on old 'rail trails', which offer a range of cycling conditions attractive to a wide target market (SRT, 2009; TRC, 2014). Examples of existing rail trails in Australia include Victoria's 100 km+ Murray to the Mountains Rail Trail (MMRT, 2014; SRT, 2009), and South Australia's Riesling Trail of 25 km (but incorporating 35 km of side loops - SRT, 2009; The Riesling Trail, undated). As has occurred in many other areas of the world, although both of these trails are fee-free to use, local businesses along the routes benefit from tourists' spend, with average visitor's trip expenditure estimated at around \$482 on the Murray and \$216 on the Riesling (SRT, 2009). Tasmania has also experienced significant growth in cycle tourism in recent years and is actively pursuing this market. In 2012 - 2013, approximately 31,800 interstate visitors (mainly from NSW [Sydney] and Victoria [Melbourne]) and 45,000 residents took overnight trips involving cycling (35.5% and 28.6% growth respectively on the previous year). Interstate cycle visitors provided a particularly high economic yield. They spent an

average of \$2,072 per trip. To capitalise on such demand, the Tasmanian State Government is actively investing in trail development, including \$500,000 pledged to develop a new 89 km cycle rail trail in the north-east of the state with a target of annual local direct tourism expenditure of \$3.5 million and 40 jobs (full-time equivalent) five years post-construction (Tasmanian Greens, 2014; TRC, 2014).

The “trail” ahead

Demand for development of infrastructure to support cycling generally (e.g., Sustrans, undated), and the various forms of mountain biking specifically (e.g., purpose-built single track trails, uplift facilities for downhill, bike parks for freeriding/trials), is increasing in many countries (Koepke, 2005; IMBA, 2013). In the US, locations such as Moab (Utah), and Fruita (Colorado) each offer hundreds of kilometres of single track mountain bike trails in desert ecosystems (MATC, 2010; OTEs, 2010). In Canada, alpine resorts such as Whistler Blackcomb offer more than 200 km of trails for mountain biking including 34 trails of lift-serviced downhill routes, and summer revenue represents approximately 75% of winter snow recreation revenue (TRC, 2005; Whistler Blackcomb, undated).

The potential economic benefits of developing and promoting biking trails in its various forms have, therefore, been widely recognised. Examples include destination mountain biking tourism (IPPL, 2008; Koepke, 2005; TRC, 2005) and competitive sporting events, typified by the World Cup Mountain Bike Series (TRC, 2005), Union Cycliste Internationale Mountain Bike, and Trials Championship (ACT,

2010). Mountain biking also provides social networking opportunities and supports a substantial industry in both equipment and clothing (e.g., ABCMB, 2002-2008).

There is no doubt that mountain biking is growing globally and is especially popular in affluent, economically developed countries where governments are keen to promote healthy exercise and whose citizens are expected to enjoy increasing leisure time in the coming decades (Zovko, 2013). Mountain biking will probably continue to evolve into new derivatives undertaken for tourism/recreation and as competitive, formalised sports, evidenced, for example, by the current increasing popularity of night mountain biking in some areas of the UK (TRA, 2013).

With a widening diversity of participants seeking different experiences, and with the Victorian Government already recognising the economic benefits of biking tourism, the Albury-Wodonga Region, for example, is in an excellent position to link with established trails such as the 100 km+ Murray to the Mountains Rail Trail (TRC, 2014) and develop an attractive addition to tourism in the area. In addition to disused rail corridors there is also the potential to use travelling stock routes, a range of already formed (formally or informally) tracks and country laneways. There are few places in the world that could offer trails that incorporate everything from mountain vistas, agricultural and bushland landscapes, trails that hug the river and the weir, historic villages and regional towns, and wineries. With careful review of availability, the basis for an extensive network of trails could be developed that would provide enjoyment for a range of experiences that span rides that challenge the most experienced of riders to those who wish to meander through the landscape on 'easy' rides. Based on experience elsewhere in the world, including Australia, the outcome could well be beneficially economically to a wide range of businesses spread throughout the Region.

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