

The value of Blue Derby to the Tasmanian economy

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ACKNOWLEDGEMENTS

We acknowledge the palawa/pakana people who continue to care for this country today. We pay our respects to their elders, past and present. We honour their stories, songs, art, and culture, and their aspirations for the future of their people and these lands.

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Header image: West Coast ebiking. Credit Revolution MTB

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ABOUT THE AUTHORS



Dr Allison Anderson is a specialist in tourism planning and market research, and an advocate for building community benefit from tourism.

Allison has a special interest in mountain biking – with a passion for the green trails and a keen interest in the benefits MTB affords places that embrace it. As head of Research & Insights at Tourism Tasmania, Allison led the unordinary adventures research and profiling of MTB visitors to Tasmania. Working as a consultant, Allison has delivered market assessments and analyses for MTB in North Queensland, Queenstown NZ and Kyogle in NSW. She also coauthored the MTB strategy for Tropical North Queensland in 2015.

Allison's PhD is in urban design and tourism, where she examined the delivery of tourism experiences at a destination level. She has worked as a Strategic Planner and academic, conducted social impact assessments, developed business plans and advised businesses on post-disaster recovery. She is currently Chair of the Northern Tasmania Development Corporation and a Ministerially appointed member of Tasmania's statutory Parks and Wildlife Advisory Council. She is an adjunct to the University of Tasmania and a Tasmanian Tourism Awards Judge.

Allison's practice is on the lands of the Mumirimina people.

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Tim Harmsen is a Tasmanian environmental economist who specialises in economic impact assessments, communication, and mountain biking.

Tim has a remarkably strong mountain biking background, having worked for multiple mountain biking tourism companies in Tasmania over the past decade, after building his mountain biking knowledge and expertise through a seven year tenure at a Hobart based bike shop. Additionally, Tim recently won the

2023 coach of the year award at the world renowned Whistler Mountain Bike Park, where he spent a season coaching and engaging with a wide range of mountain biking students.

Tim graduated from the University of Tasmania with first-class honours in economics, after completing a double degree of economics and business, where he was admitted to the Dean's honour roll, and was awarded valedictorian for his work in the economics field. More recently, Tim was awarded as an ABC Trailblazer for 2025 in recognition of his work re-establishing and successfully running the "Winter Challenge Tas" multisport event, which has a strong mountain biking and regional community engagement theme. This award led to Tim presenting on his event in Canberra's Parliament House in February.



Emily Mahler is a technician with over 20 years of professional experience in economic analysis and modelling, specialising in the visitor economy.

Emily is passionate about driving real and sustainable change for community and businesses. She has led the delivery of a body of research and analysis unmatched in its diversity, facilitated by her in-depth understanding of tourism markets and highly proficient analytical and technical capability.

Between 2004 and 2024, Emily worked at Deloitte Access Economics where she honed her skills as a complex economic modelling expert. Ultimately, Emily was responsible for developing and managing the visitor economy supply and demand forecasting models, used to inform the [Tourism Market Outlook](#) publication, and she led Deloitte's national economic contribution modelling capability.

These models formed the basis of the Tourism 2020 Strategy, Thrive 2030 Tourism Strategy, NT Tourism Industry Strategy 2030, and [Tasmania's 2030 Visitor Economy Strategy](#); the pre-eminent reference for guiding future growth and sustainability for the sector. Across all these publications, Emily was responsible for the featured tourism demand and supply requirements forecasts.

Among the economic assessments led by Emily are an economic appraisal of the proposed redevelopment of the Canberra Theatre, an economic contribution assessment of the Tasmanian Agritourism sector, visitation demand and accommodation forecasts for the Great Ocean Road, and visitation demand forecasts for a proposed Wildlife Hotel and Luxury Accommodation development in the Blue Mountains.

Emily's practice is on the lands of the Awabakal people.

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“What Blue Derby offers is something entirely unique. Something that wholeheartedly embraces the truest definition of the term ‘adventure’. Something that out-of-state workers get excited to tell their colleagues about well before they come, and long after they return.”

Combined quote of mountain biking operators and stakeholders, 2025.



1 Introduction

Blue Derby is a premium, internationally renowned mountain biking destination that has placed Tasmania on the global mountain biking map since opening in 2015. The trails' supreme quality, immersion in iconically Tasmanian wilderness, and variety of experiences are the key factors influencing riders' decisions to travel to Tasmania for mountain biking.

The development of Blue Derby coincided with a critical growth phase of mountain biking in Australia and has acted as a catalyst for accelerating the sport's popularity both statewide and nationally. Recognition on the international stage — including awards for "Trail of the Year" at the Enduro World Series in 2017 and 2019 — cemented Derby's international reputation and drove a surge of visitation.

MTB visitors are generally high-yield, staying longer, spending more, and engaging with a broader range of Tasmanian tourism offerings than the average visitor. These visitors are active and engaged in nature, dispersing into regional areas and aligned to Tasmania's brand. Along with Maydena, which attracts downhill gravity riders, Derby has acted as an anchor attraction for the large enduro market most recently, as well as some national level cross country events, and many cross-country riders. While the economic contribution of this visitation has long been acknowledged, its true scale and significance has not previously been quantified. This report addresses that gap by measuring the direct and indirect economic impacts of mountain biking on Dorset municipality and Tasmania more broadly.

Tasmania is currently at a critical juncture in its MTB tourism journey. Its success as an MTB destination has inspired similar developments elsewhere in Australia and overseas, with several interstate destinations seeking to replicate Tasmania's success in their aspiration

to take a larger share of the MTB tourism market. As Tasmania's MTB product matures, it is important to reflect and consider whether our offering is keeping pace with the growing competition and expectations of the market.

"[We need to] really make the most of our unique landscapes and lean into the quality of terrain we have to offer. We already have an awesome product, and we need to lean into marketing this hard. For Tasmania to remain competitive, we need to market the product as well as developing the product" – Tasmanian MTB operator

1.1 Report purpose and scope

This report provides specific insights around Derby as a deep dive into insights from a larger report *Maximising the value of mountain biking tourism to the Tasmanian economy*, commissioned by the Mountain Biking Network. It has been prepared for Dorset Council to provide a clear understanding of the economic impact of mountain biking on the Dorset municipality and the wider Tasmanian economy.

The purpose of this report is to quantify the direct and indirect contributions of mountain biking — including Gross State Product, visitor expenditure, and employment with a particular focus on Blue Derby as a primary driver of visitation.

The scope of this report reflects Dorset Council's request for targeted insights. It provides insight on:

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1. The contribution of mountain biking to Tasmania's Gross State Product, direct spend, and indirect spend (via multipliers).
2. The role of Blue Derby in attracting interstate and international visitors to Tasmania.
3. The impact of mountain biking on Dorset municipality through direct spend and multiplier effects.
4. The number of jobs and businesses attributable to mountain biking at both the municipal and state level.

By aligning with the priorities of Dorset Council, this report provides an evidence-based summary of mountain biking's role as a catalyst for economic activity, community development, and destination branding within the municipality.

1.2 Report structure

This report is laid out as follows:

- **Methodology** details the data sources and methods of analysis used to deliver the figures reported.
- **Economic Contribution** examines and quantifies the economic impact of visitors to Tasmania and Blue Derby that is attributable to MTB tourism. It also
- **Blue Derby Visitor Spend Characteristics** analyses the spending behaviours and characteristics of those visiting Blue Derby, as categorised by expenditure on their total trip, accommodation, food and drink, and MTB related goods.
- **Blue Derby as a Primary Motivator of visitation** assesses how influential mountain biking was in visitors decisions to visit Tasmania and Blue Derby
- **Blue Derby Operator Interviews** assess the key themes presented during interviews held with operators in Derby

- **Conclusion** concludes the report, highlighting the key economic findings relating to Blue Derby.

1.3 Definitions

In this report, the following definitions apply:

Average Spend is the calculated average expenditure for that demographic at that destination.

Average Spend Per Visitor (ASPV) is the average spend that can be attributed to each visiting individual.

Consumption is broader than spend. It includes actual spend plus estimated values of unpaid activities, such as staying in a holiday home, or visiting a museum.

Direct Employment is the number of FTE the direct spend *could* support, based on the Tourism Satellite Accounting (TSA) framework.

Direct Spend is money visitors spend with local businesses, like bike rentals and meals. This can also be expressed as expenditure.

Direct Value-Added shows local economic value after business costs are removed. It represents profits (capital) and wages (labour) kept in the community, and is the contribution made to Gross State Product (GSP).

Indirect Employment is the number of indirect, flow on FTE the indirect spend *could* support, based on the TSA framework.

Indirect Spend is the business-to-business spend, such as buying fuel for a shuttle bus.

Indirect Value-Added is the additional local profits and wages created through supply chain activities that support visitor services.

Induced Spend is the additional local spending by employees and business owners when they spend their wages, such as buying groceries or new bike parts.



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International visitors refers to non-Australian residents who have come from a different country to visit Tasmania.

Interstate visitors refers to Australian residents living outside of Tasmania who travelled by plane or ferry to get to Tasmania.

Intrastate visitors refers to Tasmanian residents travelling to MTB.

MTB Attributed refers to just the portion of that demographic's trip expenditure that can be attributed to the mountain biking component of their trip.

MTB Infrastructure is considered to be MTB trails, trail heads, access infrastructure, amenities such as toilets, signage, bike wash stations etc.

MTB Tourism is the activity of mountain biking whilst travelling. This could be travelling for the express purpose of mountain biking, or mountain biking whilst travelling.

MTB Tourists/Visitors are visitors who MTB on their trip, either for the express purpose of mountain biking, or mountain biking whilst travelling.

MTB Trails are defined in alignment with the MTBAP24 definitions. It does not include rail trails, however rail trails are considered important infrastructure to support Mountain Biking activity, and are briefly discussed in this report.

Spending Individuals refers to those individuals who spend on their trip. It excludes non-spending children.

Total Trip refers to visitors' total expenditure on their whole trip to Tasmania, including non-mountain biking related expenditure.

Travelling/Tourism is aligned to the Tourism Research Australia and UNWTO definition of a tourist. That is, a person who is away from their usual environment for less than one year, travelling for leisure, business or other personal

reasons, but not for employment in the place they are visiting.

1.4 A note on economic interpretation

The results presented in this report are expressed in terms of total trip spend, mountain biking-attributed spend, value added, and employment supported, and apply to the year ending March 2025.

Total trip spend refers to the overall expenditure of visitors who participated in mountain biking while in Tasmania. This includes all goods and services purchased during their trip, whether or not the spending was directly motivated by mountain biking.

Mountain biking-attributed spend isolates the share of this expenditure that visitors directly linked to their mountain biking activities. This ensures results reflect the portion of spending that would not have occurred without mountain biking as a motivator.

Value added measures the contribution of this activity to Tasmania's Gross State Product (GSP). It is the additional net value created once intermediate inputs are excluded, and is the most appropriate measure for comparing the scale of mountain biking's impact with other industries.

Employment supported is expressed as full-time equivalent (FTE) positions. These figures represent the number of jobs the industry has the capacity to sustain based on economic relationships between spending and employment, rather than the precise number of people currently employed.

For example, a mountain biking visitor staying at the Dorset Hotel, booking a shuttle with Up Down Around, and dining in Branhholm contributes to total trip spend. Of this, only the share they identified as mountain biking-related is counted as MTB-attributed spend. The local



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value of those transactions, after removing inputs, contributes to value added, while the wages earned by hotel staff, shuttle drivers, and café employees circulate through the Dorset community, representing the employment potential created by this expenditure.

All results have been modelled using the Tourism Satellite Accounting (TSA) framework, an internationally recognised standard for measuring the economic and employment impacts of tourism. Applying this framework ensures that estimates of total trip spend, MTB-attributed spend, value added, and employment are robust, comparable, and consistent with accepted economic practice.

2 Methodology

This report applies the internationally recognised Tourism Satellite Accounting (TSA) framework to estimate the economic contribution of mountain biking to the Dorset municipality (through Blue Derby) and Tasmania more broadly. The approach combines primary survey data with established secondary data sources and follows a structured process to derive reliable estimates of spending, value added, and employment supported by Blue Derby as a catalyst for visitation.

1: Establishing visitation baseline

The Tasmanian Visitor Survey (TVS) provided the baseline estimates of visitor numbers by origin (intrastate, interstate, international). Raw data was reviewed and outliers removed to ensure consistency before being combined with TVS data to accurately model Blue Derby visitation. TVS data only records out of state visitation, so survey data was used to algebraically solve for the estimated number of intrastate visitors per year, and their likely group characteristics.

2: Adjusting for spending individuals

To avoid overstating expenditure, visitor numbers were adjusted to account for non-spending children. In line with national averages, families with younger children were reduced by 1.8 children per group, while those with older children were discounted by 0.9 per group to reflect partial expenditure. This was done to reflect young children most likely spending \$0 while in Blue Derby, and older children likely spending a few of their own dollars, but also incurring a higher spend on goods such as food and shuttles. Given Blue Derby's family friendly nature, failing to account for non-spending children would significantly overestimate in-region spend. These adjustments were applied proportionally across intrastate, interstate and international visitation segments.

3: Estimating expenditure profiles

Primary data from Survey 1 (n=321) was used to develop expenditure profiles for each visitor origin group. Respondents reported both their total trip spend and the proportion directly attributable to mountain biking, with separate breakdowns for key categories such as accommodation, food and beverage, and MTB-related services (e.g. shuttles, guiding, rentals, repairs etc). These averages were applied directly to the adjusted visitation figures. Survey 2 (n=31) was too small for modelling and was therefore used only to provide forward-looking insights on barriers to travel and latent demand, and was not used for any modelling on visitation and expenditure estimates.

4: Attributing spend to mountain biking

From the expenditure profiles, two measures were derived:

A. Total trip spend – the overall expenditure of visitors who participated in mountain biking during their trip.

B. Mountain biking-attributed spend – the share of this expenditure that respondents indicated was directly linked to mountain biking.

This distinction allowed modelling of both the broader tourism spend of MTB visitors and the narrower portion that can be directly attributed to the activity. A comprehensive and active direct spend estimate model was created to show the economic impact increased visitation could have on both Blue Derby, and Tasmania more broadly.

5: Modelling economic contribution

Spending estimates were translated into economic impact using the regional Australian Tourism Satellite Accounting (TSA) framework.



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Value added was calculated as the contribution to Gross State Product (GSP) once intermediate inputs and imports were removed.

Employment supported was estimated using TSA output-to-employment ratios, expressed as full-time equivalent (FTE) positions. These figures represent the number of jobs the level of spending could sustain, rather than a precise headcount of current employment within the Dorset region.

Leakages, such as imported goods or online purchases, are inherently accounted for within the TSA modelling framework.

6: Validation and context checking

Visitation estimates were sense-checked against Strava geotracking data and local trail counters, which showed general alignment with modelled figures. In addition, stakeholder interviews with tourism operators and local governments managing MTB assets provided qualitative context and evidence of business development, demand drivers, and visitor behaviour.

2 Economic Contribution of MTB Tourism to Tasmania

This section of the report examines and quantifies the economic impact of visitors to Tasmania. It provides key points in summary from the main report *Maximising the economic value of mountain biking tourism to the Tasmanian Economy*.

2.1 Statewide MTB visitation

Tasmania received an estimated 86,747 mountain bikers taking mountain biking 'trips' for the year ending March 2025.¹ Of these, it is estimated that 75,656 were spending individuals and the remainder are non-spending individuals such as young children. These figures are shown in [Table 1](#). They have been derived using a mixture of TVS data and, data observed in survey 1 analysis, and data communicated through interviews with operators.

Table 1. Statewide Estimated Annual MTB Visitation

Origin	Total Visitation	Spending Individuals
Intrastate	54,994	47,000
Interstate	25,927	22,830
International	5,826	5,826
Total	86,747	75,656

2.2 Statewide Economic Impact of Mountain Biking in Tasmania

[Table 2](#) shows the estimated direct spend of mountain bikers in Tasmania for the year ending March 2025. The 'Total Trip' expenditure represents the total amount of money spent by individuals while in Tasmania – including those parts not relating to mountain biking in any way. The 'MTB Attributed' spend represents just the spend attributed to the mountain biking portion of an individuals trip.

As shown, there is an estimated direct spend in Tasmania for the year ending March 2025 of \$113.3m that can be attributed to mountain biking tourism activities. This does not include retail purchases of new bikes – it simply refers to spend from individuals while on a mountain biking trip in Tasmania. \$91.7m of this direct MTB attributed spend comes from out-of-state individuals.

¹ TVS year ending March 2025

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Table 2. Total spend of MTB visitors in Tasmania per year

	Total Trip	MTB Attributed
Total spend of MTB visitors per year	\$142,759,434	\$113,254,130
Total spend of Tasmanian MTB visitors per year	\$26,229,795	\$21,529,458
Total spend of out of state MTB visitors per year	\$116,529,639	\$91,724,672

Table 3 shows the contribution to the Tasmanian economy this spend has. Of particular note is the \$61m total contribution to Gross State Product (GSP). \$36.7m of this is a direct contribution to GSP; the other \$24.3m represents the indirect (flow on) impact this spend has on GSP. Consumption includes this value add, as well as consumption of non-monetary goods; the value of riding free mountain biking trails, or visiting a beach, public park, or museum, for example, is also represented here.

These figures show that mountain biking tourism is capable of supporting 590 FTE jobs throughout the state, as catalysed by MTB tourism in Tasmania. 345 of these FTE jobs come directly through the MTB tourism industry and the remaining 246 FTE jobs are indirectly created through the flow on economic activity created by MTB tourism in Tas.

It is important to note that no economic multiplier has been used here. Rather, the TSA framework has been used to calculate indirect impacts as a more rigorous and regionally tailored method to eliciting such figures. This is an internationally regarded approach, and can be considered a more accurate approach to estimating such figures than through use of a multiplier.

Table 3. Statewide MTB Attributed Economic Contribution

	Direct	Indirect	Total
Value added (\$m)	\$36.7	\$24.3	\$61.0
Consumption (\$m)	\$117.1	-	\$117.1
Employment (FTE)	344.8	245.5	590.3

3 Blue Derby's economic contribution to MTB tourism in Tasmania

This section illustrates the characteristics of MTB visitor spend in Derby and evaluates its overall economic contribution to Tasmania. It shows the value of the individual markets in the town and their relative contribution to Tasmania:

- **Intrastate visitors** bring high numbers and consistent business to the town
- **Interstate visitors** are significantly lower in numbers but higher in value to the town, although Derby is susceptible to heavy competition from Maydena in this market, potentially as well from other low-profile trails as this would also cover the caravan and camping market engaging in MTB whilst on their trip.
- **International visitors** spend more and stay longer, but low in volume.

Understanding these markets and what motivates them to travel to ride, or to ride whilst on holiday is critical to the ongoing creation of value for Derby from the MTB market.

3.1 Blue Derby visitor numbers

Blue Derby had an estimated 45,148 mountain biking visitors for the year ending March 2025, just over 50% of the total MTB visits in the state, shown in [Table 4](#). Of those, it is estimated that 39,247 were spending individuals, and the remainder are non-spending individuals such as young children.

As [Table 5](#) shows, Derby attracts a disproportionately high number of Tasmanian intrastate MTB visitors compared with interstate visitors. [Table 6](#) shows that out-of-state mountain biking visitors stayed longer than intrastate visitors, and spent more per day than intrastate visitors. The further a mountain biker has travelled to get to Derby, the longer they stay, the more mountain biking days they have, and the more they spend across a whole trip, and the more they spend per mountain biking day.

Previous research has cited that in 2021, Blue Derby was receiving an estimated 30,000 visitors per year.² The research in this report suggests they are reasonable estimates, given the growth in mountain biking both within Tasmania and beyond.

Table 4. Visitation Estimates – By Destination

Place	Total visitation	Spending Individuals	Share
Blue Derby	45,148	39,247	52%
Maydena Bike Park	30,000	26,309	35%
Other Destinations	11,599	10,100	13%
Total	86,747	75,656	

² TRC Tourism, 2021

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Table 5. Blue Derby estimated annual MTB Visitation³

Origin	Total Visitation	Spending Individuals	% of Tas share
Intrastate Visitors	33,139	28,321	60%
Interstate Visitors	9,075	7,991	35%
International Visitors	2,935	2,935	50%
Total	45,148	39,247	

Table 6. Blue Derby visitor trip length

Average Trip Length	Total Days	MTB Days
Intrastate	3.56	3.56
Interstate	8.77	5.92
International	11.33	6.22

3.2 Blue Derby visitor spend and contribution

Table 7 shows that International MTB visitors spend the most per MTB day with an estimated average spend per day of \$614.70 per MTB day, and a total MTB-attributed spend per trip of \$3,823.43. Table 8 shows that the spend of MTB visitors is relatively evenly distributed between accommodation, food and drink, and MTB related goods.

Table 7. Blue Derby visitor spend characteristics⁴

Visitor Origin	Average MTB Attributed Spend per Trip	Average Spend per Day	Average spend per MTB day
Intrastate	\$555.91	\$155.98	\$155.98*
Interstate	\$2,992.01	\$341.06	\$505.69
International	\$3,823.43	\$337.46	\$614.70

Table 8. Blue Derby visitor spend categorisation⁵

Derby Visitor Spend Characteristics	Accommodation		Food and Drink		MTB-related goods (per MTB day)	
	Per trip	Per day	Per trip	Per day	Per trip	Per day
Intrastate	\$223.30	\$62.65*	\$224.14	\$62.89	\$219.58	\$61.61
Interstate	\$1,420.76	\$161.95	\$1,148.57	\$130.93	\$992.38	\$167.73
International	\$2,087.50	\$184.25	\$1,131.25	\$99.85	\$1,275.00	\$204.98

³ Survey 1 data was applied to these visitation estimates to elicit the following direct spend estimated, as categorised by visitor origin

⁴ It is assumed that intrastate mountain bikers taking a mountain biking trip to Derby have visited solely for mountain biking. As such, their spend per day equals their spend per MTB day.

⁵ Intrastate accommodation spend per day only relates to the 48% of intrastate visitors who stay in paid accommodation. Camping costs are not represented here.

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Table 9 shows that whilst intrastate visitors spend less per trip, they still make up over 70% of the MTB visitor spend in Derby. This illustrates an estimated \$50.9m of direct, MTB-attributed spend occurring in Tasmania, as catalysed by MTB visitors to Tasmania. Although only 26.6% of visitors to Blue Derby are from out of state, they represent 69% of the total spend. It is important to note that the total trip spend does not represent spend catalysed by Blue Derby. It represents spend that would have occurred anyway, even if Blue Derby did not exist as a mountain biking destination.

Table 9. Blue Derby visitor total spend

Visitor origin	% Blue Derby share	Total Trip Spend	MTB attributed direct spend
Intrastate visitors	73.4%	\$18,350,581	\$15,744,161
Interstate visitors	20.1%	\$31,419,116	\$23,908,561
International	6.5%	\$15,068,569	\$11,220,314
Total	100%	\$64,838,266	\$50,873,035
Out of state total	26.6%	\$46,487,685	\$35,128,875

Table 10 shows that the direct + indirect contribution to the state economy in the form of GSP is \$26.6m for the year ending March 2025. \$15.6m of this represents direct, consumer to business spend, and \$11.1m of this represents the business to business indirect spend – the ‘flow on’ of the direct spend.

The TSA accounting framework estimates that, given this level of expenditure, 159 direct FTE jobs and 115 indirect FTE jobs are being supported by Blue Derby. It is important to note that this is not the number of FTE currently operating in Blue Derby. Rather, it is as estimated of the number of FTE jobs the spend catalysed by Blue Derby could be creating throughout the Dorset municipality, with some overflow into neighbouring regions.

Table 10. Blue Derby economic contribution to Tasmania

	Direct	Indirect	Total
Value added (\$m)	\$15.6	\$11.1	\$26.6
Consumption (\$m)	\$52.6	-	\$ 52.6
Employment (FTE)	159	115	274

4 Blue Derby visitor insights

This section provides insight into the characteristics, motivations and preferences of visitors to Blue Derby, elicited through the research undertaken for the major project. It draws from survey responses, interviews and other research.

4.1 Blue Derby visitor characteristics

Intrastate Visitor Behaviour in Blue Derby

52% of intrastate visitors to Blue Derby have \$0 stays while in the town. This is likely indicative of free-camping, or staying in holiday homes, or with friends. 48% of intrastate visitors stay in paid accommodation, for an average trip cost of \$223.3.

Intrastate visitors are more likely to bring food with them from home for their time in Derby, with an average per day spend of \$62.89 on food and drink. This is likely to represent a dinner and 1-2 drinks each night, for example.

An average daily spend of \$61.61 on MTB-related goods is likely representing 1-3 days of shuttling a range of trails (Black Stump, Blue Tier, Bay of Fires etc) on an intrastate visitors average 3.5 day MTB trip, plus a few MTB related expenses such as tyres, brake pads and general bike repairs, for example.

Interstate Visitor Behaviour in Blue Derby

When interstate visitors come to Tasmania for mountain biking (as catalysed by Blue Derby), they spend an average of 8.77 days in the state. On average, 5.92 of these days are mountain biking days. They spend an average of \$161.95 per night on accommodation. Data shows that less than 5% of these visitors camp, or stay in unpaid accommodation. They spend an average of \$130.93 per day on food and drink, and spend an average of \$167.73 on MTB-related goods per MTB day.

International Visitor Behaviour in Blue Derby

When international visitors come to Tasmania for mountain biking (as catalysed by Blue Derby), they spend an average of 11.33 days in the state. On average, 6.22 of these days are mountain biking days. They spend an average of \$184.25 per night on accommodation. There was no data collected in this study to provide evidence of international visitors camping or staying in unpaid accommodation while in the state. They spend an average of \$99.85 per day on food and drink, and spend an average of \$204.98 on MTB-related goods per MTB day. This indicates that international MTB visitors have a greater tendency to embrace MTB offerings available while in town. From interviews with MTB operators in Derby, it is understood that international visitors are most likely to embrace full service packages – shuttles, bike rental, guiding etc.

4.2 Blue Derby as a primary motivator of visitation to Tasmania

It is difficult to elicit if Blue Derby was the primary reason visitors came to Tasmania for mountain biking. ~25% of all out-of-state visitors who come to Tasmania for mountain biking come via the Spirit Of Tasmania ship. Generally, they will come with their own bikes, and ride at several destinations. This likely makes the destination catalyst for a mountain bike trip Tasmania as a state, with Derby playing an influential role in this.

The below table gives a breakdown of those out-of-state visitors that responded to the survey whilst in Blue Derby, showing how influential mountain biking was in their motivations to visit Tasmania.

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64% of interstate visitors came specifically for mountain biking, 24% came for mountain biking but had some other reason to come as well, and only 12% came for reasons other than mountain biking, where mountain biking was incidental to the trip.

78% of international visitors came specifically for mountain biking, 22% came for mountain biking but had some other reason to come as well, and 0% came for reasons other than mountain biking, where mountain biking was incidental to the trip.

This implies that once a visitor has it in their mind that they wish to visit Tasmania for mountain biking, it holds great significance in their future plans, and they come to Tasmania primarily for the sole reason of mountain biking.

Table 11. MTB influence on Tasmanian trips

	Interstate Visitors	International Visitors
Came to Tas for mountain biking	64%	78%
Came to Tas specifically for mountain biking, but also had other reasons	24%	22%
Did not come to Tas for mountain biking	12%	0%

4.3 Blue Derby operator perspectives

Interviews conducted with operators in Derby, elicited insights into visitor demand from the perspective of those catering for out-of-state visitors. The following themes emerged from these interviews.

Reliance upon out-of-state visitors

Several Derby MTB operators commented on the reliance they have upon out-of-state visitors to stay financially afloat. Operators in Derby suggest that 80% of their business comes from out-of-state visitors who come and purchase complete, high value packages including bike rental and shuttles. Other operators who service the Blue Derby trails but offer a tour-styled experience suggest that up to 95% and even 99% of their business comes from out-of-state visitors.

Demand for wilderness trails

Tasmania's wilderness trails, especially signature rides like the Blue Tier and Bay of Fires, are major attractors for out-of-state riders. Operators see potential in developing a multi-day wilderness ride, similar to New Zealand's Old Ghost Road, to further cement Tasmania's reputation. One shuttle operator indicated that around 25% of their revenue comes from servicing the Blue Tier and Bay of Fires Trails.

Increasing demand for e-bikes

All interviewed Derby operators mentioned the significant increase in demand they have observed for e-bike rental over recent years. Some operators that service the Blue Derby trails commented that they are seeing up to 90-95% of their guests booking e-bikes for their tours. Other operators in Derby suggested they're observing around one-third of all bikes in the network being e-bikes. Several operators commented on the lack of e-bike specific infrastructure in Blue Derby, such as secure charge stations for e-bike batteries.



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Demand for more centralised information hubs

Several operators commented on the increasingly curious visiting mountain biker who is unsure as to where essential amenities were in town (such as bike wash), how to navigate the trail network, how to book in with a shuttle bus, and where the shuttle buses go to etc. A suggestion was made that a centralised information point with clear and concise information would aid in making the visiting mountain biker feel more confident making their way through the trails and the town.

Increasing Competition

Many operations commented on the increasing competition Blue Derby and Tasmania are beginning to see – and are likely to continue seeing – over the coming years. Blue Derby has been used as a success story around Australia, and other towns such as Mogo (NSW) and Warburton (VIC) are attempting to replicate the Blue Derby success. It is important Tasmania and Blue Derby acts pro-actively to retain its competitive edge and continue attracting and retaining high-yielding out-of-state visitors.

Need for better marketing approaches

A commonly mentioned theme was the need for Tasmania and Blue Derby to develop stronger marketing strategies to rival out-of-state competition. Blue Derby has 'ridden on its unique charm for a long time, but this charm won't carry it through the next decade as successfully. Stronger marketing efforts are needed to make Tasmania as/more attractive than New Zealand, which famously attracts a strong adventure tourism market.

Need for more ancillary adventure activities

Many operators compared Tasmania with other international MTB destinations that have a range of ancillary adventure tourism activities for non-mountain bikers, or resting mountain bikers, to enjoy when they're not mountain biking.

5 Conclusion

Is has been known since its inception as a mountain bike town that Blue Derby has been a key economic driver for the Dorset region. This report quantifies this impact and shows the potential for future growth in the region. Blue Derby catalysed \$50.9m of direct, MTB attributed spend in the year ending March 2025.

This came from over 45,000 visitors; 39,250 of these were spending individuals. Over 12,000 of these were visitors from out-of-state. Mountain biking in Tasmania, as catalysed by Blue Derby, directly contributes \$26.6m to Tasmania's Gross State Product, and has an indirect contribution to GSP of \$11.1m.

Blue Derby has shown capacity to support 274 FTE jobs in Tasmania, catalysed by MTB tourism. 159 of these are direct jobs, supported directly by MTB activity in Blue Derby, and are all within the Dorset region. 115 of these are indirect jobs, and would primarily be in the Dorset region, but with some overlap into neighbouring regions.



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Appendices

Appendix 1: NOVA Economics Economic contribution of tourism framework

Economic contribution analysis Economic contribution or input-output (IO) modelling is an analytical framework used to evaluate the contribution of an entity, event or industry within a specific economy, in a particular historical reference period.

For a typical production industry, such as agriculture or mining, the applied technical framework follows the Australian Bureau of Statistics (ABS) National Accounting Standards.⁶The ABS' Australian and State National Accounts report on measures such as Gross Domestic Product (GDP), value added, exports, imports and employment associated with Australia's production industries.

GDP, in particular, is the core, broadly recognised measure of economic wealth or welfare within a national economy. At a sub-aggregate level, there are several commonly used measures of economic activity, each of which describes a different aspect of an industry's economic activity:

Value added measures the value of output (i.e. goods and services) generated by the entity's factors of production (i.e. labour and capital) as measured by the income to those factors of production.

Conceptually, the sum of value added across all entities in the economy equals Gross Domestic Product.

Given the relationship to GDP, the value added measure can be thought of as the contribution to welfare.

Value added is the sum of:

- Gross operating surplus (GOS). GOS represents the value of income generated by the entity's direct capital inputs, generally measured as the earnings before interest, tax, depreciation and amortisation (EBITDA).
- Tax on production less subsidies provided for production. This generally includes company taxes and taxes on employment. Importantly, taxes less subsidies on products is paid by consumers, and not paid by industry and is therefore not attributed to industry value.
- Labour income representing the value of output generated by the entity's direct labour inputs, as measured by the income to labour.

Gross output measures the total value of the goods and services supplied by the entity. This is a broader measure than value added, also including the value of intermediate inputs used by the entity that flow from value added generated by other entities.

Employment is a fundamentally different measure of activity to those above. It measures the number of workers that are employed by the entity, rather than the value of the workers' output. Employment is typically measured in Full Time Equivalents (FTE). The ABS breaks down IO industry employment by full time and part time, and allocates 1 FTE per full time and 0.5 FTE per part time.

⁶ Australian Bureau of Statistics, Australian National Accounts: National Income, Expenditure and Product Methodology, March 2025. <https://www.abs.gov.au/methodologies/australian-national-accounts-national-income-expenditure-and-product-methodology/mar-2025>

An aerial photograph showing two people riding bicycles on a narrow dirt path through a dense forest. The path is surrounded by lush green ferns and other vegetation. The person on the left is wearing a green shirt and a blue helmet, while the person on the right is wearing an orange shirt and a green backpack. The path leads into the distance, disappearing into the trees.

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Tourism contribution framework.

Tourism, however, as a consumption (or demand-side) defined industry uses the Tourism Satellite Account (TSA) approach to measuring the economic contribution of visitor activity.⁷ The TSA framework is conceptually similar to and draws on the ABS IO tables to generate results. It is based on an international approach to defining the tourism sector and different tourism products and related industries, dependent on the extent to which they interact with tourists either directly or indirectly. Aside from employment, there are three measures of tourism activity presented in this report:

- Visitor expenditure is a measure of the aggregate price of goods paid by the consumer or a reflection of the price impact on visitors. It includes components that are not directly related to the industries producing the goods and services for tourism purposes, including imports, product taxes, and transport and wholesale margins. It is necessary to adjust for these non-industry components of supply to obtain a truer sense of the economic value of this activity.
- Visitor consumption captures the full value of goods and services consumed by visitors, including non-purchased and subsidised elements such as unpaid use of holiday homes or the broader economic value of visiting a museum or gallery.
- Value added is the most appropriate measure of economic contribution of the tourism sector as it ensures no 'double counting' of components of spend that should be allocated to other industries or economies. A direct contribution of tourism occurs where there is a direct relationship, both physical and economic, between the visitor and the producer of the good or service. In other words, the direct economic contribution of tourism measures the value generated by industry activity whenever a direct exchange occurs between a tourist and a business (i.e. consumption defined activity).

The indirect contribution of tourism consumption is a broad notion that covers upstream or supplier effects of tourism demand. For example, this may include the value of the cleaning services used by a hotel to service visitor activity or the fuel that supports tourism related aviation activity. In summary, the indirect contribution measures the value that arises from the production of goods and services used as part of the provision of tourism products or services.

For example, when a tourist buys a meal in a hotel restaurant, only the hotel's services are a direct contribution. However, the farm that supplies vegetables, the wholesaler delivering produce, and the utility company supplying power to the kitchen are all part of the indirect contribution; they support the tourism activity but do not transact directly with the visitor.

The Nova Economics Tourism Contribution Model is consistent with the TSA framework, drawing inferred industry and regional specific multipliers from published Regional and State Tourism Satellite Accounts to model the direct and indirect economic contribution of MTB attributable spend to the Tasmanian economy.

⁷ Tourism Research Australia, Regional Tourism Satellite Account, 2023-24. <https://www.tra.gov.au/en/economic-analysis/tourism-satellite-accounts/regional-tourism-satellite-account>

Appendix 2. Surveys

Survey 1: The Value of Mountain Biking to Tasmania

The value of Mountain Biking to Tasmania - Rider Survey

Thank you for taking the time to complete this survey. It is designed to help us understand the value of mountain biking in Tasmania and to plan for mountain biking infrastructure and services.

episteme takes your confidentiality seriously. Our data management and privacy policy is [here](#). Any information you provide will be treated anonymously, but may be used in a report for the Mountain Biking Network Tasmania.

1. Who are you riding with today? *tick all that apply*

- ☐ Just me
- ☐ My partner
- ☐ Family
- ☐ Friends
- ☐ Colleagues
- ☐ Other (please specify)

2. How many people are in your group, including you?

Number of people

3. Do you have any non-riders in your group?

- ☐ No
- ☐ Yes - how many?

4. Do you use Strava to record your mountain biking?

- ☐ Yes
- ☐ No
- ☐ Sometimes - what percentage of your rides do you log?



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* 5. What mountain bike destination have you primarily come to ride today?

- ☐ Blue Derby
- ☐ Maydena Bike Park
- ☐ St. Helens Mountain Bike Park
- ☐ Mt. Wellington / South Hobart
- ☐ West Coast Trails
- ☐ George Town Mountain Bike Park
- ☐ Wild Mersey
- ☐ Other (please specify)

The value of Mountain Biking to Tasmania - Rider Survey

6. Tell us about THE mountain biking experience that made you want to come, and why. This could be: a trail type, an off-the-bike activity, an event, or something not even related to mountain biking!

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7. Thinking about your reasons for visiting this mountain bike destination, how important were the following factors influencing your choice to ride here?

	Not at all important	Not important	Neutral	Important	Very important
High quality of the trail / trails	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
The natural environment	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Range of trail options for me / my whole group	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Somewhere new to tick off my mountain biking bucket list	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Access to shuttle buses and tourism operators	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Range of accommodation options	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Range of food and drink options	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Other good activities nearby (hiking, sauna, beaches, camping etc).	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Quality of the dirt	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
The vibe of the town	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

8. Which of the following improvements to this mountain bike destination would you value the most? Please rank the following

- ☐ More trail options
- ☐ More accommodation/hospitality options (pubs, cafes, air bnbs etc)
- ☐ More general amenities (toilets, showers, water top up locations)
- ☐ More non-MTB experiences nearby (sauna, playground, general tourism experiences etc)
- ☐ More/better signage
- ☐ More MTB events (racing, dig days, demo days etc)
- ☐ More bike specific amenities (bike wash stations, bike racks, e-bike charge points)
- ☐ More trail maintenance

9. What do you think we should invest in to improve the Mountain Biking experience in Tasmania?

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* 10. Where do you live?

- ☐ Tasmania
- ☐ Victoria
- ☐ New South Wales
- ☐ Australian Capital Territory
- ☐ Queensland
- ☐ South Australia
- ☐ Northern Territory
- ☐ Western Australia
- ☐ Other (please specify)

11. What were the key trails that you rode in Blue Derby? Tick up to 5
(If you haven't ridden yet, list the ones you're most excited to ride)

- ☐ I don't know
- ☐ Valley Ponds (Derby to Branhholm) (Green)
- ☐ Derby Lake (Green)
- ☐ Derby Tunnel (Green)
- ☐ Hazy Days (Green)
- ☐ Flickity Sticks (Blue)
- ☐ Return to Sender (Blue)
- ☐ Krushka's (Blue)
- ☐ Dambusters (Blue)
- ☐ Kings wall (Blue)
- ☐ Triple 3 (Blue)
- ☐ Blue Tier (Blue)
- ☐ First 13 (Blue)
- ☐ Atlas (Blue)
- ☐ Bay of Fires Trail (Blue)
- ☐ Air ya garn (Black)
- ☐ Trouty (Black)
- ☐ Cuddles (Black)
- ☐ Roxanne (Black)
- ☐ 23 Sitches (Black)
- ☐ Kumma Gutza (Double Black)
- ☐ Detonate (Double Black)
- ☐ Shearpin (Double Black)
- ☐ Other (please specify)

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12. What were the key trails that you rode in Maydena? Tick up to 5
(If you haven't ridden yet, list the ones you're most excited to ride)

- ☐ I don't know
- ☐ Scandinavia (Green)
- ☐ Dirt Surfer (Green)
- ☐ Waratah (Blue)
- ☐ Beach Babe (Blue)
- ☐ Pandani (Blue)
- ☐ Marriott's (Blue)
- ☐ King Brown (Black)
- ☐ Stix and Stones (Black)
- ☐ Tinder (Black)
- ☐ Pamela (Black)
- ☐ The Local (Black)
- ☐ Natures Nectar (Double Black)
- ☐ Thrash horse (Double Black)
- ☐ The Nunnery (Double Black)
- ☐ Gnar yeah (Double Black)
- ☐ Zen Garden (Pro Line)
- ☐ Express Lane (Pro Line)
- ☐ Dirt Church (Pro Line)
- ☐ Yeah Gnar (Pro Line)
- ☐ Maydena Hits (Pro Line)
- ☐ Other (please specify)

13. What were the key trails that you rode in St Helens? Tick up to 5
(If you haven't ridden yet, list the ones you're most excited to ride)

- ☐ I don't know
- ☐ Pearla (green trail)
- ☐ Town link (green trail)
- ☐ Humpback (green trail)
- ☐ Dreaming pools (blue trail)
- ☐ Old Salty Dog (blue trail)
- ☐ See ya later (blue trail)
- ☐ Wedged in (blue trail)
- ☐ Rock Lobster (blue trail)
- ☐ Send Helens (black trail)
- ☐ Icarus (black trail)
- ☐ Mack 10 (black trail)
- ☐ Shucka (black trail)
- ☐ Other (please specify)

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14. What were the key trails that you rode on the West Coast? Tick up to 5
(If you haven't ridden yet, list the ones you're most excited to ride)

- ☐ I don't know
- ☐ Stormsdown (Zeehan - black loop trail)
- ☐ Featherstone (Zeehan - blue trail)
- ☐ Western Odyssey (Zeehan - blue trail)
- ☐ Silver Lining (Zeehan - blue trail)
- ☐ Zeehan Spray Tunney (green trail)
- ☐ Ready Orr Not (Queenstown - green trail)
- ☐ Sticht up (Queenstown - blue trail)
- ☐ Welcome to Queenstown (Queenstown - blue trail)
- ☐ Summit loop (Queenstown - blue trail)
- ☐ Waterfall (Queenstown - blue trail)
- ☐ The Long Spur (Queenstown - blue trail)
- ☐ North Owen Descent (Queenstown - black trail)
- ☐ Natural Selection (Queenstown - double black trail)
- ☐ Other (please specify)

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15. Have you travelled more than 50km to get to this destination from your home?

☐ Yes

☐ No

16. How long did you spend travelling to get to where you're riding?

Hours

Minutes

17. How many days is this mountain biking trip?

Days

18. What kind of mountain biker would you call yourself?

☐ This is my first time mountain biking

☐ A rare mountain biker

☐ An occasional mountain biker (just a few times per year)

☐ A sometimes mountain biker (at least once a month)

☐ A frequent mountain biker (at least once a week)

☐ A competitive mountain biker

19. Thinking about the riding trip you are on now, roughly what percentage of your total trip spend can be attributed to mountain biking? (Include costs like fuel, accommodation, food, drinks, shuttles, bike parts etc)

0%

100%

20. Approximately, how much have you spent on this mountain bike trip? If covering costs for others, include this spend too.

INCLUDE: Accommodation, bike parts/repairs, shuttle tickets, food and drink, other tourism experiences undertaken while here etc.

DON'T INCLUDE: Fuel Cost

\$ TOTAL spend on this MTB trip

\$ on accommodation ONLY

\$ on food and drink ONLY

\$ on MTB related expenses ONLY

21. If you didn't take this mountain biking trip in Tasmania, how would you have spent this money instead?

☐ Mountain bike trip interstate/internationally

☐ Non-mountain bike holiday elsewhere interstate/internationally

☐ Non-mountain biking holiday in Tasmania

☐ Stayed home and saved the money

☐ Some other way - please specify

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22. Did you come to Tasmania specifically to go mountain biking?

- ☐ Yes
- ☐ Yes but had some other reasons as well
- ☐ No

23. How long are you in Tasmania for?

Days

24. How many mountain biking days have you had on this Tasmanian trip?

Days

25. Thinking about your trip to Tasmania, roughly what percentage of your total trip spend can be attributed to mountain biking? (Include costs like fuel, accommodation, food, drinks, shuttles, bike parts, car hire, etc)

0% 100%

26. Approximately how much have you spent since being in Tasmania on this trip? If paying for others too (kids, for example), include this spend too.

INCLUDE: Accommodation, bike parts/repairs, shuttle tickets, food and drink, other tourism experiences undertaken while here etc.

DO NOT INCLUDE: Fuel cost.

\$ TOTAL spend on this trip to Tasmania

\$ spend on accommodation ONLY

\$ spend on food and drink ONLY

\$ spend on MTB related expenses ONLY

27. How often do you visit Tasmania and go mountain biking?

- ☐ This is my first time
- ☐ At least once per year
- ☐ Once every 1-3 years
- ☐ Once every 3-5 years
- ☐ Less than once every 5 years

28. How much have you spent on getting to Tasmania / this region? If paying for others too (kids, for example), include this spend too.

INCLUDE: Flights/boat travel to get here, airport Ubers, car rental, fuel.

\$ Spent getting to Tasmania and to this region

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29. If comfortable to do so, can you please share your gender?

- ☐ Woman
- ☐ Man
- ☐ Non-binary
- ☐ Prefer not to say
- ☐ Other (please specify)

30. If comfortable to do so, can you please share your age?

- ☐ <18
- ☐ 18-25
- ☐ 26-35
- ☐ 36-45
- ☐ 46-55
- ☐ >55
- ☐ Prefer not to say

31. If you've answered every question in this survey, you are eligible to go into the draw to win:

1 x 3-day Blue Derby Pods Ride iconic experience valued at \$2,450,
5 x 1-day Maydena Bike Park Uplift Pass valued at \$100 each,
5 x 10-Uplift passes with Up Down Around at Derby, valued at \$120 each,
1 of 5 \$100 MTB Direct vouchers.

If you would like to enter, please enter your email address or phone number below. If you're a winner, we'll get in touch with you!

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