



CYCLING TOURISM: 2015 MARKET DYNAMICS

MARKET BEHAVIOUR

15% of participants in our survey had engaged in a cycling experience, while on holiday:

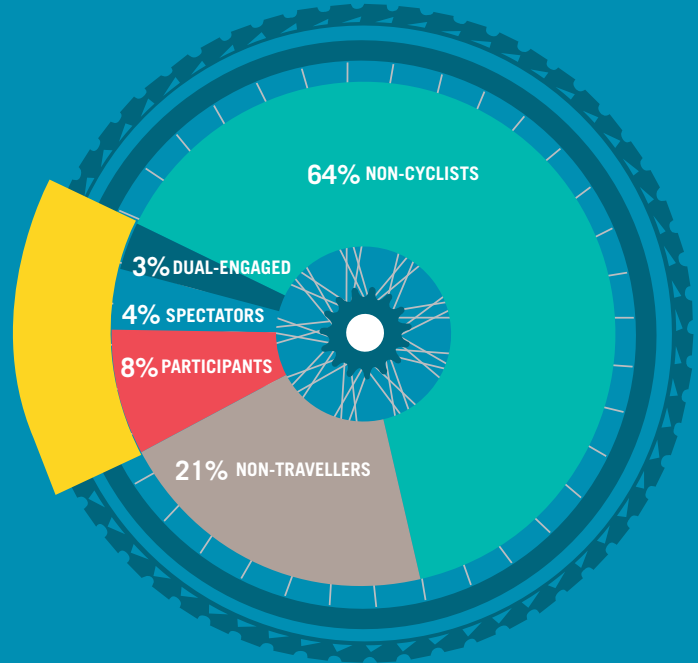


41% DAY TRIPS
40% OVERNIGHT (1 - 3 NIGHTS)
18% OVERNIGHT (4+ NIGHTS)

TOP ACTIVITIES

| | |
|-------------------------------------|-----|
| Sightseeing | 41% |
| Cycling on foreshore, river or lake | 35% |
| Day trip along metro paths | 25% |

45% of participants engage in cycling on holiday at least 3 times per year



TOP REASONS FOR PARTICIPANTS



50% HEALTH AND FITNESS



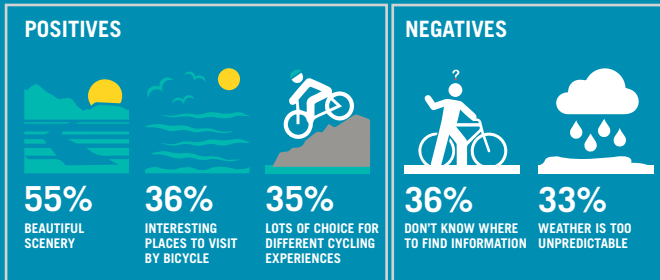
42% ENJOY BEING OUTSIDE



42% RELAXATION

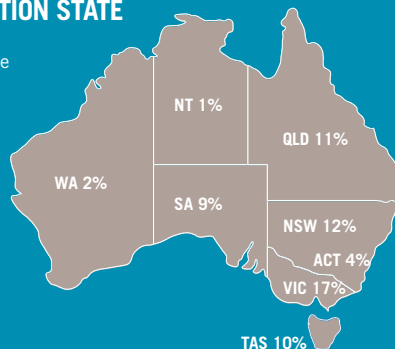
ATTITUDES AND KNOWLEDGE

ATTITUDES TO VICTORIA AS CYCLING TOURISM DESTINATION



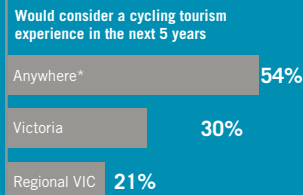
BEST CYCLING DESTINATION STATE

Victoria is the number 1 ranked state. However, 34% were unable to determine which state would be best for cycling tourism



OPPORTUNITIES

CONSIDERATION OF CYCLE TOURISM



*This includes 29% who would consider and a further 26% who were unsure

TOP IDEAS TO ENCOURAGE CYCLING TOURISM IN VICTORIA

