GROWING CYCLING TOURISM IN VICTORIA

INTRODUCTION

In Australia and across the world, domestic and international holiday-makers are becoming increasingly focused on travel experiences that involve adventure and maintain a healthy lifestyle. This attitudinal and behavioural shift has resulted in growth in cycling tourism.

Tourism Research Australia (TRA)—in partnership with Tourism Victoria—contracted EY Sweeney to conduct research to better understand the motivators and barriers of cycling tourism in Australia and its potential for growth in Victoria.

This summary reports on key findings from the research, including:

- Level of engagement in cycling tourism
- Market dynamics of cycling tourism
- Awareness and knowledge of cycling tourism
- Victoria’s positioning as a cycling tourism destination.

KEY MESSAGES

- The cycle tourism market is relatively small in size, but those involved often take multiple trips each year and are highly engaged.
- Cycle tourists engage in a broad range of activities and, although Melbourne and Sydney are most visited, they often travel to regional areas.
- Respondent awareness and knowledge of cycle tourism is low.
- Victoria rates highly on a number of dimensions of the cycle tourism experience including facilities and accommodation, variety of cycle options, and quality of tracks and trails.
- Many respondents—including some who had not taken holidays involving cycling—would consider travel of this kind in the future, with Victoria the most commonly preferred destination.
- Online information can generate awareness and educate the market on Victoria as a cycling destination.
RESEARCH APPROACH

The research was conducted through an online survey of respondents from New South Wales, Victoria, Queensland, South Australia, and the Australian Capital Territory. Overall, 3,131 people were asked a series of screening questions used to estimate the size of the cycling tourism market.

The 15-20 minute survey was then completed by 2,000 respondents, which included a minimum 400 who had engaged in cycling tourism previously. Cycle tourists were targeted to ensure a sufficiently robust sample to examine their behaviour and attitudes.

The information in this summary was taken from the full report which is available on request from tourism.research@tra.gov.au.

MARKET SIZE AND DYNAMICS

The cycle tourism market is relatively small in size, but those involved often take multiple trips each year and are highly engaged.

- The majority of respondents (85%) had not travelled or taken a holiday, short break or day trip involving a cycling experience in the last two years.
- Among the 15% of respondents who had enjoyed travel including a cycling experience, they were more likely to have participated than spectated although some had done both (Figure 1).

FIGURE 1: THE CYCLE TOURISM MARKET
While overall the number of respondents who took a trip including a cycling experience was small, the frequency with which they did so was relatively high.

Among participants, almost half (45%) had participated in at least 3 cycling events in the past year, while 36% of spectators had attended 3 or more cycling events over the same period.

Cycle tourists most often took trips with at least one overnight stay (59%), with similar rates for participants (57%) and spectators (64%).

Recreational cycling on day trips close to home was the single most common trip type (28%) and more frequently associated with participants (30%) than spectators (20%) (Figure 2).

Many respondents who took trips where they participated in cycling events were strongly engaged in this activity. Nearly two-thirds (64%) reported the cycling experience as their main reason for travelling.

The most common reasons cited for participating in cycling on their most recent trip were health and fitness (50%), relaxation (42%), enjoying the outdoors/open air (42%), enjoying recreational cycling (42%), and sightseeing (40%) (Figure 3).

![Figure 2: Types of Cycling Trip](image)

Q1c. When you take a holiday, short break or day trip that involves either participating in or spectating a cycling experience, is the trip mostly...? Base: participants/spectators (n=562)

Q10. What were the main reasons for undertaking the (most recent) cycling experience? Base: Participants (n=408)
**MOST COMMON CYCLING ACTIVITIES AND DESTINATIONS**

Cycle tourists engage in a diverse range of activities and, although Melbourne and Sydney are most visited, they often travel to regional areas.

- Sightseeing around the city/town (41%) and cycling on paths/routes along a foreshore, river or lake (35%) were the most popular activities undertaken by cycle tourists on their trip.
- However, they often participated in a number of other activities including riding in a charity event, mountain biking and food and wine cycle tours (Figure 4).
- Melbourne was the single most popular destination for cycling experiences, with one-third (33%) of participants and 45% of spectators having visited in the last two years.
- Sydney was close behind, visited by 32% of cycle participants and 37% of spectators.
- Dispersal to regional areas was also common, with 49% of cycle tourists venturing to such destinations most often in Victoria or New South Wales.

### FIGURE 4: MOST COMMON ACTIVITIES

<table>
<thead>
<tr>
<th>Activity</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sightseeing around the city/town</td>
<td>41%</td>
</tr>
<tr>
<td>Cycling on cycle path routes along a foreshore, river or lake</td>
<td>35%</td>
</tr>
<tr>
<td>Day trip along metropolitan cycle paths</td>
<td>25%</td>
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<tr>
<td>Watching a cycle race or bike event</td>
<td>24%</td>
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<tr>
<td>Cycling along rail trails that have been converted to bike paths</td>
<td>21%</td>
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<tr>
<td>A challenging road bike route via hills, mountains, or scenic countryside</td>
<td>20%</td>
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<tr>
<td>A local cycling tour of your hometown or city</td>
<td>19%</td>
</tr>
<tr>
<td>Riding in a charity or bike event</td>
<td>19%</td>
</tr>
<tr>
<td>Mountain biking on fire trails/off-road</td>
<td>18%</td>
</tr>
<tr>
<td>Mountain biking in dedicated areas</td>
<td>16%</td>
</tr>
<tr>
<td>A historical or heritage bike ride</td>
<td>16%</td>
</tr>
<tr>
<td>A food and wine cycle tour</td>
<td>16%</td>
</tr>
<tr>
<td>Competing in a cycle race</td>
<td>13%</td>
</tr>
<tr>
<td>A cycle tour where you camp or stay overnight along the way</td>
<td>12%</td>
</tr>
<tr>
<td>Cross country cycling in alpine areas</td>
<td>11%</td>
</tr>
<tr>
<td>Other</td>
<td>1%</td>
</tr>
</tbody>
</table>

Q4. In the last two years, which of the following cycling experiences have you taken part in?

Base: Participants/spectators (n=562)
AWARENESS AND KNOWLEDGE

Respondent awareness and knowledge of cycle tourism is low.

- Highlighting the low level of awareness and knowledge of and consideration given to cycling tourism, almost half of all respondents could not identify any destination they thought was good for cycling tourism.

- Even among those who nominated a destination, the most common response was France (14%), reinforcing the notion that many respondents were simply unfamiliar with cycle tourism. In the case of Australian destinations, regional areas were more likely to be nominated than capital cities.

- Once prompted, more than one-third of all respondents (34%) were still unable to identify a state in Australia they considered best for a cycling holiday, although the rate was considerably less for those having had a cycling experience in the past two years (12%).

- Among those who nominated a state, this was most likely to be Victoria (17%), followed by New South Wales (12%), Queensland (11%), and Tasmania (10%) (Figure 5).

- Notably, however, the rates for Victoria (24%) and Tasmania (23%) increased substantially for those who had recently taken a holiday involving a cycling experience.

FIGURE 5: BEST STATE FOR CYCLING TOURISM

Q18. In your view, which state or territory do you think is the best for cycling experiences as part of a holiday, short break or day trip?
Base: Total sample (n=2,000)
DIMENSIONS OF CYCLE TOURISM

Victoria rates highly in a number of dimensions of the cycle tourism experience.

All survey respondents were questioned about which state they thought best delivered on four dimensions of the cycle tourism experience:

- New South Wales and Victoria (both 19%) were rated best for facilities and accommodation, although 34% of respondents were unable to nominate a state.

- Tasmania (23%) was a standout choice as the best state for natural scenery, followed by Queensland (14%), and Victoria (13%). Respondents found that nominating a state was easiest for this dimension.

- Victoria (16%) was the state most often cited as best for cycling tours and options, but almost half the respondents could not say which state was best.

- Victoria (16%) was also seen as offering the best quality cycling tracks and trails, although again almost half the respondents were unable to nominate a state.

Notably, for those who had previously taken a holiday including a cycling experience, Victoria was rated best on all four dimensions. This included being rated above Tasmania (21% compared with 17%) in relation to natural scenery.
VICTORIA AS A CYCLING TOURISM DESTINATION

Many respondents—including some who had not taken holidays involving cycling—would consider travel of this kind in the future, with Victoria the most commonly preferred destination.

- Nearly three in ten (29%) of all respondents indicated they would consider taking a trip including cycling activities within the next 5 years and a further 26% were unsure.
- Most respondents who had previously taken a holiday involving a cycling activity (85%) would consider a trip of this sort again, while the same applied to 21% of those with no previous cycle tourism experience.
- Of those respondents who would consider undertaking cycle activity on a holiday, short break or day trip in the next five years, 32% indicated they would most likely visit Victoria for that experience.
- The majority of these respondents were Victorians (62%), while 23% were from New South Wales.
- Within Victoria, the Great Ocean Road (15%) was perceived as the best destination for a cycling experience.
- Figure 6 highlights the positive and negative attitudes respondents had towards Victoria as a cycling destination. Most notably, over half agreed that Victoria has beautiful scenery for a cycling trip.
- Given that being outside in the open air and sightseeing were cited as important reasons for engaging in cycling tourism, these attitudinal findings underline why Victoria is perceived as an attractive cycling tourism destination.

FIGURE 6: ATTITUDES TO VICTORIA AS A CYCLING DESTINATION

POSITIVE STATEMENTS

- 55% Victoria has beautiful scenery that would make a cycling trip enjoyable
- 36% Victoria has some interesting places that I’d like to visit by bicycle
- 35% Victoria has lots of choice when it comes to different cycling experiences
- 32% Victoria is a safe place to cycle

NEGATIVE STATEMENTS

- 36% I don’t know where to find information on cycling opportunities in Victoria
- 33% The weather is too unpredictable to enjoy a cycling trip in Victoria
- 20% It’s difficult to get my bike to areas that offer good cycling experiences
CREATING A VALUE PROPOSITION

Collaboration between relevant providers and stakeholders would help deliver a value proposition that generates awareness and educates the market on cycling destinations.

- The research findings indicate that the value proposition for cycle tourism should focus on three key areas: configuring, communicating and delivering.

**Configure**

- **Give a reason to go:** Half of respondents agreed that cycling is a great way to experience new places and that it’s a great social activity.

- **Give an online experience that provides simple information:** There was a big call for downloadable maps and online information.

- **Safety and convenience:** Dedicated bike paths in locations close to nature settings such as foreshores, rivers, and lakes.

- **Augmented experiences that highlight natural surroundings:** Such as parks, waterfalls, and other natural features.

**Communicate**

- **Promote the dedicated bike paths and facilities, highlighting the ease with which anyone can engage in cycling tourism.**

- **Persuade potential travellers that cycling tourism is a collective social experience that offers unique benefits from other experiences.**

- **Remind current participants and those considering cycle tourism of the beauty of Victoria’s regional areas.**

- **Engaging image-based communications via regional tourism channels to plant the cycling tourism seed among travellers.**

**Deliver**

- **Although time and effort is not a key barrier, packaged tours may help legitimise cycling tourism and address confidence issues.**

- **Creating tours that align with specific events, times, or destinations may appeal to those with a desire for intrastate travel.**

- **Victorian regional areas that offer appealing natural features should build and promote dedicated cycling tourism facilities.**
CONCLUSION

Although the cycle tourism market is relatively small, those involved are highly engaged.

- Around two-thirds of the 15% of respondents who had taken a short break or holiday involving a cycling experience in the past two years cited the cycling experience as the main reason for their trip.

Respondent awareness and knowledge of cycle tourism is low.

- Even once prompted, more than one-third (34%) of respondents were unable to identify a state they considered best for a cycling holiday in Australia. However, among those who did, most nominated Victoria.

Many would consider taking a holiday involving cycling in the future, with Victoria the most commonly preferred destination.

- Nearly three in ten respondents would definitely consider taking a trip including cycling activities in the next five years, including 21% of those who had no previous cycle tourism experience.

Online information can generate awareness and educate the market on Victoria as a cycling destination.

- Respondents are looking for an online experience that provides simple information on cycle tourism. The provision of downloadable maps (38%), accessible online information (37%) and a website for planning a trip (36%) were among the most common ideas reported to help increase cycle tourism in Victoria.