

Growing Cycling Tourism in Victoria

Research Report



EY Sweeney

EY Sweeney:

Tourism Victoria:

Tourism Research Australia:

Project no.

Date:

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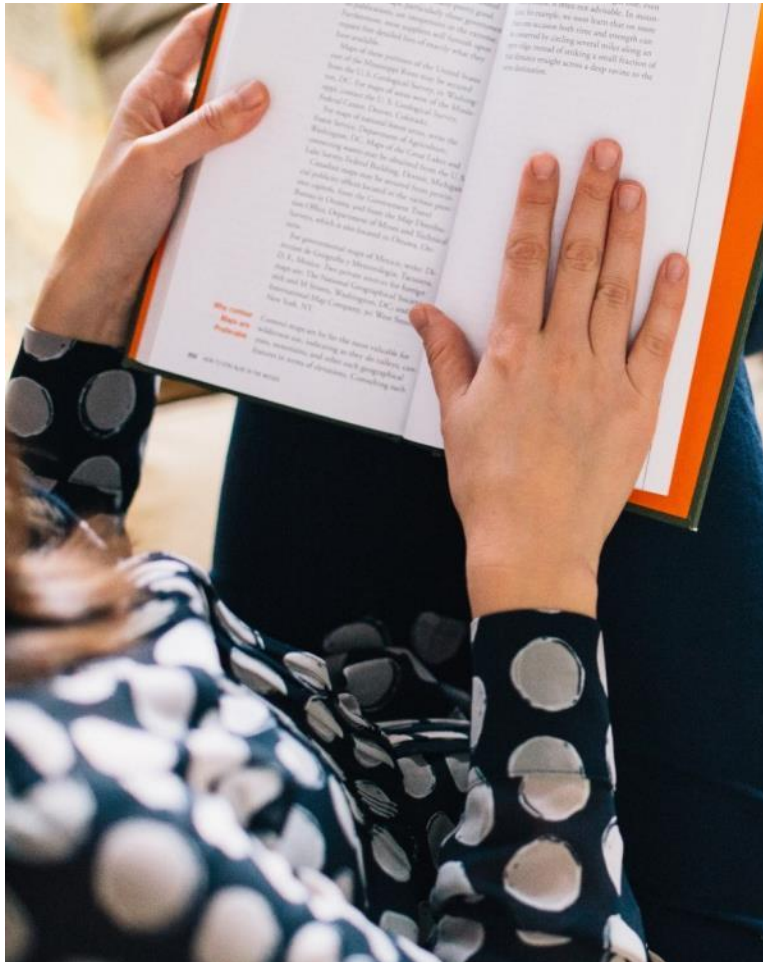
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All aspects of this study will be completed in accordance with the requirements of that scheme.

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Background and research agenda

Background to the research

In Australia and across the world, domestic and international holiday-makers are becoming increasingly focused on holiday plans that involve experiences that are adventurous and help maintain a fit and healthy lifestyle. A key outcome of this attitudinal and behavioural shift is the growth in cycling tourism.

In order to best prepare Victoria to foster this growing form of tourism, Tourism Victoria delivered *Victoria's Cycle Tourism Action Plan (2011-2015)*. The *Action Plan* evaluated the prevalence of and potential for cycling tourism in the state, and outlined key strategies for growing Victoria's position as the leading Australian state for cycling tourism.

There are some clear points of difference on offer for those seeking cycling tourism experiences in Victoria compared to other states, not the least being the diversity of potential experiences available (including mountain biking, on and off-road trails and road cycling events). The diversity of natural settings on offer (ranging from stunning coastal roadways through to diverse mountain and forest trails and everything in between) suggests that Victoria is a premium setting for cycling tourism.

In conjunction with Tourism Research Australia (TRA), Tourism Victoria have commissioned research to better understand the opportunity for growing cycling tourism in Victoria. The following report details the findings of that research.

Fast Facts

Some background data does exist to highlight the scale of this shifting set of behaviours within Victoria...

- ▶ 416,000 domestic overnight visitors to Victoria went cycling on their trip in 2013-14 (increasing 66% from corresponding results in 2007-08)
- ▶ 21% of Australians consider Victoria an ideal place for a cycling experience
- ▶ The total estimated expenditure for the year ending December 2010 by domestic overnight, daytrip and international overnight visitors* that participated in cycling in Victoria is \$362 million
- ▶ In 2010, approximately 1 million domestic overnight visitors in Australia participated in cycling during their trip. These visitors spent over 5.7 million nights in Australia
- ▶ Approximately 141,000 daytrips were undertaken by domestic visitors participating in cycling in Victoria during the year ending December 2010

Source: *Victoria's Cycle Tourism Action Plan (2011-2015)*. The *Action Plan*

Research objectives



The overall aim of the study:

- To develop insights on the motivators and barriers of cycling tourism, and to better understand the impact of cycling experiences on visitation to regional areas of Victoria.

Specific research objectives

1

Understand levels of engagement

2

Measure awareness and knowledge of cycling experiences in Victoria

3

Understand preferences for different cycling experiences on offer

4

Understand the impact of cycling tourism on travel plans

5

Understand the profiles and behaviours of cycling visitors

Objectives in detail

1

Understand levels of engagement

- ▶ Initially exploring engagement in local cycling generally (interest, participation, attendance at events etc.), and seeking to investigate any links to cycling tourism

2

Measure awareness and knowledge of cycling experiences in Victoria

- ▶ Seeking to gauge awareness of and interest in Victorian cycling experiences across the state and linkage between experiences/events and particular regions

3

Understand preferences for different cycling experiences on offer

- ▶ Testing different cycling experiences available in Victoria in terms of awareness, resonance and impact
- ▶ Establish and measure key motivators and barriers to engagement in cycling tourism

4

Understand the impact of cycling tourism on travel plans

- ▶ Evaluating cycling tourism behaviours to understand how it may encourage visitation to specific areas of the state and by specific traveller types
- ▶ Investigating the potential flow-on effects of cycling tourism in Victoria in terms of length of stay, visitor dispersal, type of visit and estimated spend

5

Understand the profiles and behaviours of cycling visitors

- ▶ Providing TRA and Tourism Victoria with some insights around who may be the most fruitful targets for cycling tourism by profiling the demographics and psychographics of engaged sub-groups

A review of our approach

1. Orientation and design



Aim: To set the foundation for the research program to ensure it absolutely delivers the insight and direction required

Approach: Two interrelated components...

- ▶ 1.5 hour orientation workshop with the Tourism Victoria and TRA team
- ▶ Desk research (incl. review of Cycling Action Plan)

2. Quantitative research



Aim: To determine key attitudes and behaviours in relation to cycling tourism in key markets within Australia

Approach: A 15-20 minute online survey of n=2,000 respondents across **five key** markets...

- ▶ Victoria
- ▶ New South Wales
- ▶ Queensland
- ▶ South Australia
- ▶ ACT

3. Analysis and reporting



Aim: To provide a comprehensive, insightful, and easily accessible report to help improve regional cycling offerings or strategies

Approach: A number of deliverables to help understand state of cycling tourism and opportunities for growing cycling tourism in Victoria. These deliverables include...

- ▶ A comprehensive report on the state of cycling tourism and recommendations
- ▶ An infographic that visually communicates key issues in cycling tourism

4. Ongoing consultation



Aim: To ensure stakeholders understand the research findings and are able to develop relevant strategies

Approach: Ensuring open and interactive communication between the research team and Tourism Victoria/TRA including...

- ▶ A face-to-face presentation of the research findings that visually communicates the key issues
- ▶ Regular meetings throughout the research process and a draft report to ensure research findings are actionable and comprehensible

Quantitative methodology

The study involved the conduct of 2,000, 15-20 minute online interviews conducted between 25th March and 8th April 2015.

To be eligible for participation, all respondents were...

- ▶ Aged 18-69
- ▶ Located in one of the following states/territories; New South Wales, Victoria, Queensland, Australian Capital Territory, and South Australia

The final achieved sample structure is shown opposite.

Sample for the survey was drawn from online panels provided by Lightspeed Research. Sample was selected randomly, with quotas employed on the completed interviews to ensure adequate coverage of age, gender and location broadly in line with the 2013 ABS Census.

Data was weighted to the 2013 ABS Census for gender, age and location to ensure that it was representative of the population.

Further detail of the sample structure is located in the Appendix.

Respondent Sample Structure				
		No. of Interviews (unweighted) #	Weighted %	¹ Max Margins of Error +/-
Total		2000	100	2.2%
Gender	Male	1001	46	3.1
	Female	999	54	3.1
Age	18-34	631	33	3.9
	35-54	718	41	3.7
	55-69	651	25	3.8
Location	VIC	575	29	4.1
	NSW	757	37	3.6
	QLD	460	24	4.6
	SA	173	8	7.5
	ACT	35	2	16.6

¹Maximum margins of error shown are based on a research finding of 50% at the 95% Confidence Interval

A guide to reading this report

This report provides a number of quantitative tables and charts. Throughout these tables and charts we have indicated where specific sub-groups, for example residents of particular states or different age groups, are statistically significant from each other.

Where a sub-group is significantly higher than the average, it is highlighted in **green** text or accompanied by a [↑]. Conversely, where it is significantly lower, it is highlighted in **red** or accompanied by a [↓].

All significance testing was conducted at the 0.05 level.



What is a cycling experience

For the purpose of this study, *cycling experiences* were defined as:

- ▶ Riding in a charity / sports event
- ▶ Sightseeing
- ▶ Recreational cycling
- ▶ Watching a cycling race or other activity where people are cycling



Understanding the types of cycle tourists

► **Cycle tourists** – Over the last two years*

- A cycle experience was included on a holiday, short break or day trip taken in the LAST TWO YEARS
 - Participants
 - Spectators
 - Dual engaged or those that were both spectating and participating

► **Recent cycle tourists** – Most recent experience

- A cycling experience was included in the MOST RECENT holiday, short break or day trip
 - Recent local cyclists[^]
 - Recent participants
 - Recent spectators



**In this study, respondents have defined themselves as cycling tourists based on their answers to the question:*

Now thinking about your holidays, short break away from home in the last 2 years did any of them include a cycling experience – 1. Yes, I participated in a cycling experience 2. Yes, I watched a cycling event in person 3. No, there was no cycling experience.

[^]Note that for the purposes of this research, a “Recent local cyclist” is not strictly considered a cycling tourist due to the nature of their engagement



Market structure and dynamics

The market consists of a small group of highly engaged cycling tourists.



Cycling engagement

Definitions for respondents in the sample

- To help identify the incidence of cycling tourism, our questionnaire used two key questions and hence categorised respondents into five distinct groups...



**Participants
last 2 years**

Had participated in a cycling activity while on a holiday or trip in the last 2 years



**Spectators
last 2 years**

Had watched a cycling activity in person while on a holiday or trip in the last 2 years



**Dual engaged
last 2 years**

Had watched a cycling activity AND participated in a cycling activity while on a holiday or trip in the last two years



Non-cyclists

Had been on a holiday or trip in the last 2 years AND had not participated in/spectated a cycling activity while on a holiday or trip away from home



Non-travellers

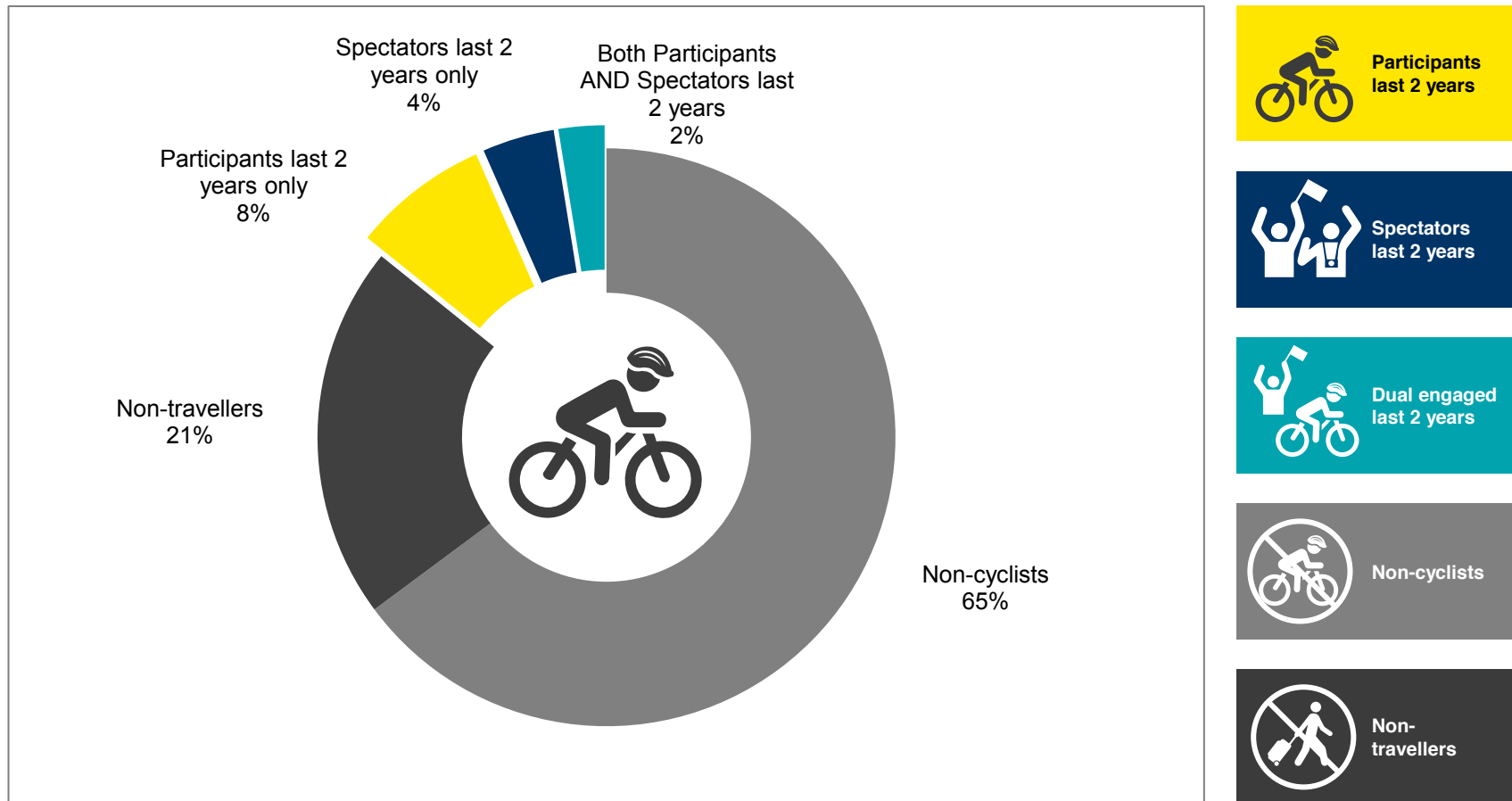
Had not been on a holiday or trip in the last 2 years

S6. Have you been on a holiday, short break or day trip...

S7. Now thinking about your holidays, short breaks or day trips away from home in the last 2 years, did any of them include a cycling experience?

Cycling engagement in the last two years

- While away on their holidays, short breaks or day trips, the majority of those surveyed had not cycled as part of their travels. Of those that had, participation was the most common form of engagement, compared with those who had spectated a cycling event.



S6. Have you been on a holiday, short break or day trip...

S7. Now thinking about your holidays, short breaks or day trips away from home in the last 2 years, did any of them include a cycling experience?

Base: Total Sample (n=2,000)

Summary

- ▶ The majority of those surveyed had not participated in a cycling experience in the last two years however...
- ▶ **15%** of those surveyed had engaged in a cycling experience as part of a holiday, short break or day trip in the last two years. That group can be further broken down into three categories...

Participants **8%**



Participants (Participated in cycling in the last 2 years)

- ▶ A third (34%) of those participants aged 25-34 participated at least 4 times per year.
- ▶ Three in five (57%) spent at least one night away while on a cycling trip.
- ▶ Four in five (81%) of participants engaged in a cycling experience in the last two years at an intrastate destination. 57% had engaged at an interstate destination.

Spectators **4%**



Spectators (Watched a cycling event in the last 2 years)

- ▶ Four in five (79%) spectators watch a cycling event at least once a year.
- ▶ Similar to participation destinations, Australia's two most populous cities were the two most common destinations for spectators; Melbourne (45%) and Sydney (37%).

Both participant & spectator **3%**



Dual engaged (Participated and spectated in the last 2 years)

- ▶ Half (50%) of those dual engaged had visited Melbourne as a participation destination in the last 2 years, with Sydney their second choice (44%).
- ▶ Two in five (43%) enjoy following cycling events, and see cycling experiences and events as doing something different (38%).

- ▶ The reasons that people engaged with cycling tourism were more about relaxation and activity rather than adventure. Participants were more commonly undertaking **low effort cycling activities**. The most common reasons for engaging in a cycling experience was **to enjoy recreation (55%), health and fitness (52%) and enjoying being outside in the open air (51%)**.

Some key differences between sub-groups

Participants **8%**



Participants (Participated in cycling in the last 2 years)

- ▶ Participants were more **definite considers** of a cycling trip in the next 5 years than spectators (**82% vs 67%**).

Spectators **4%**



Spectators (Watched a cycling event in the last 2 years)

- ▶ **One in five (19%)** spectators experienced the cycling event in **Adelaide** (Tour Down Under), compared to **2%** of **participants**. South Australia was more likely to be considered the best cycling destination in Australia for spectators compared to participants.
- ▶ Were more likely to be younger (**18-24 years of age**) compared to participants (**33% vs 22%**).
- ▶ Were more likely to be **less confident cyclists and lacking experience to consider cycling on a trip**. They were more likely to agree with statements regarding potential barriers such as time and effort in planning a cycling trip and cycling problems.

Dual engaged **3%**

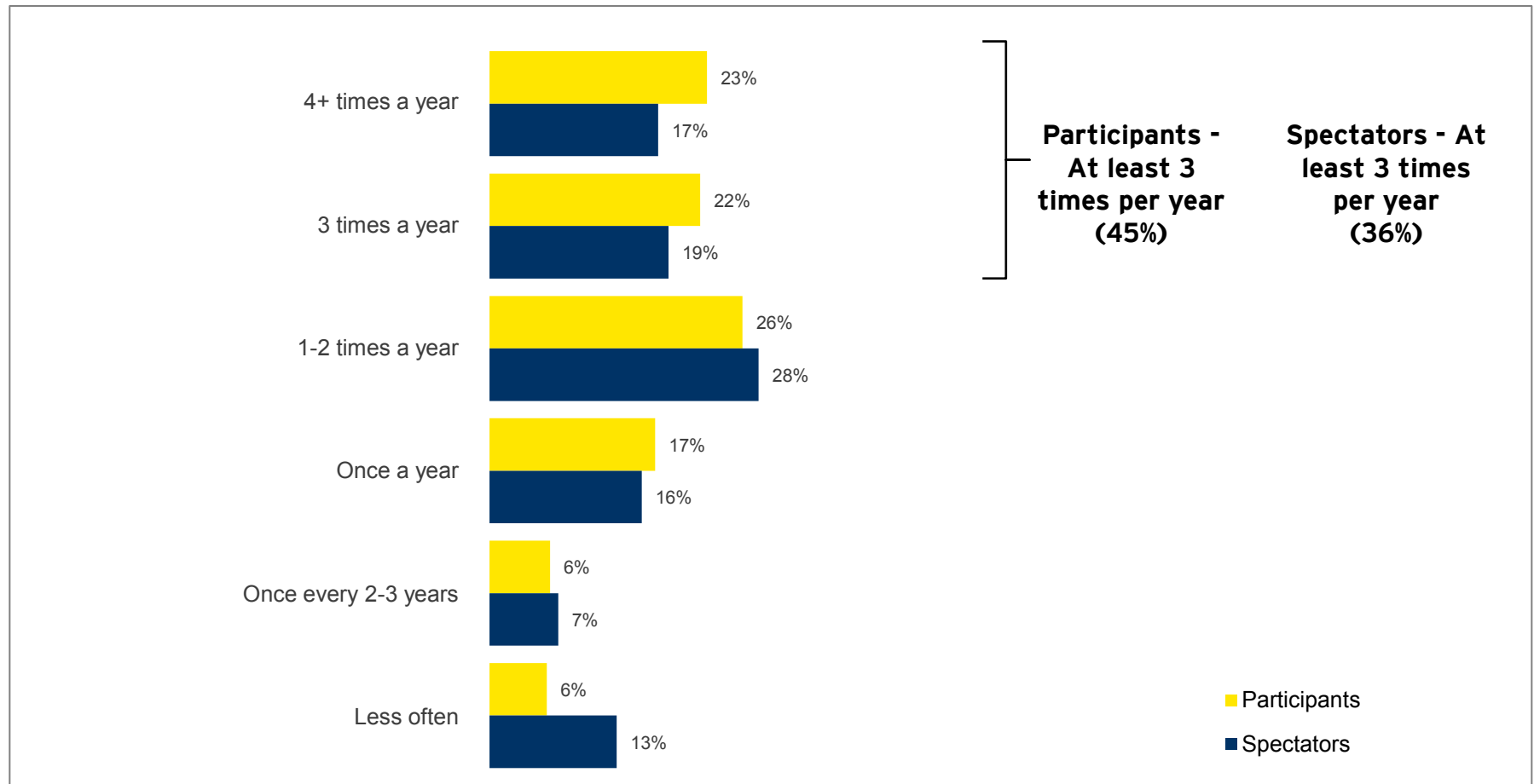


Dual engaged (Participated and spectated in the last 2 years)

- ▶ They were more **confident cyclists**, yet for some, do not feel experienced enough to consider cycling as part of a trip. Other **potential barriers such as perceived time and effort, finding accommodation** were also higher for dual engaged.
- ▶ Were more **invested in competing, following and spectating cycling specific events**, whereas participants were more likely to cycle for general benefits such as **recreation, health and fitness and being outdoors**.

Frequency of engagement in cycling tourism

- Just under half of all participants in a cycling experience typically engage at least three times per year, suggesting that cycling tourism is a niche but high engagement activity. 1 in 3 spectators were also highly engaged.



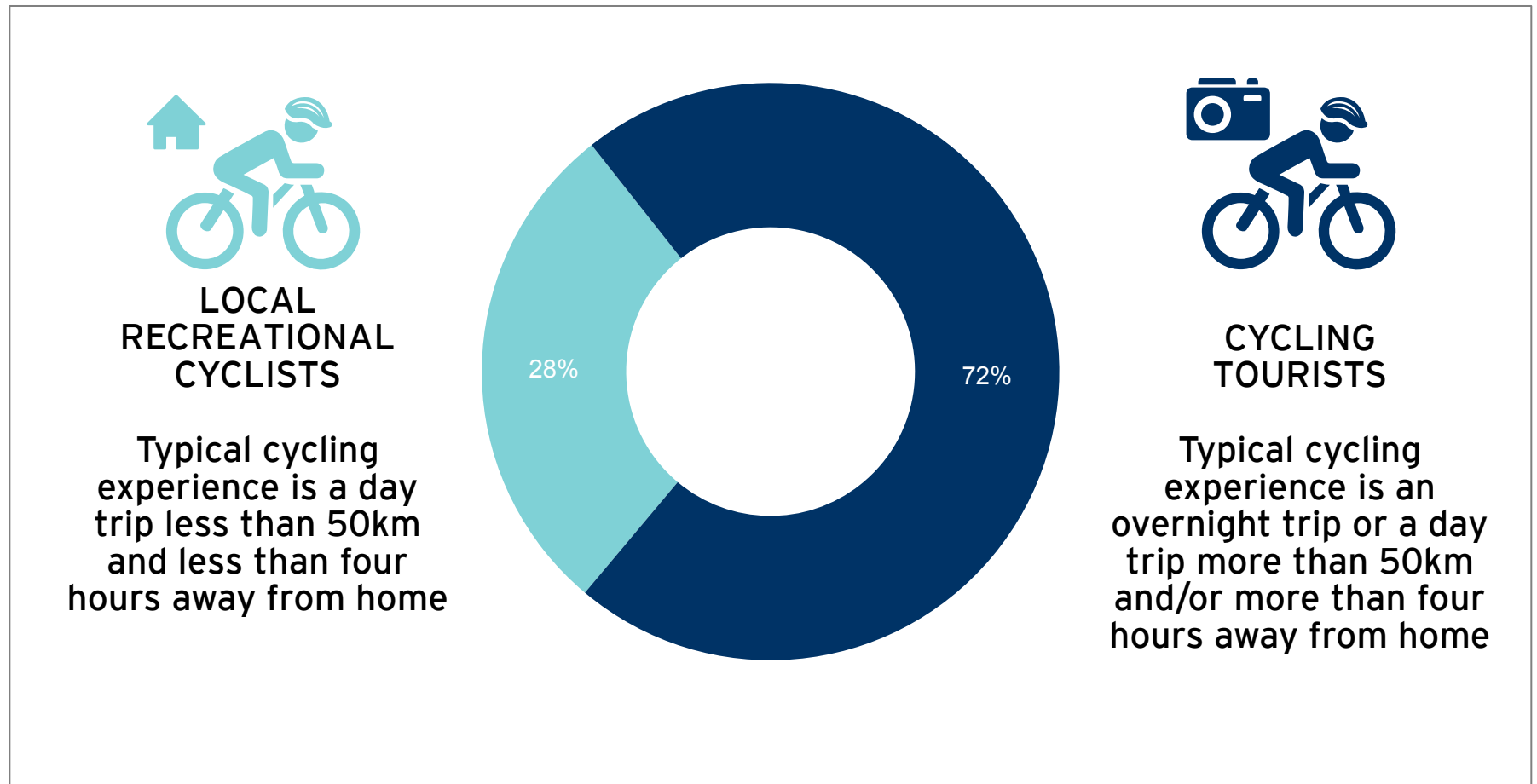
Q1a. How often would you take a holiday, short break or day trip that involves **participating** in a cycling experience?

Q1b. How often would you take a holiday, short break or day trip that involves **spectating** at a cycling event/race in person?

Base: Participants (n=408), Spectators (n=284)

Cycling tourism vs. local recreational cycling

- ▶ Although 14% of our sample reported they had engaged in cycling tourism, according to our definitions, a quarter of these individuals had really only engaged in local recreational cycling...



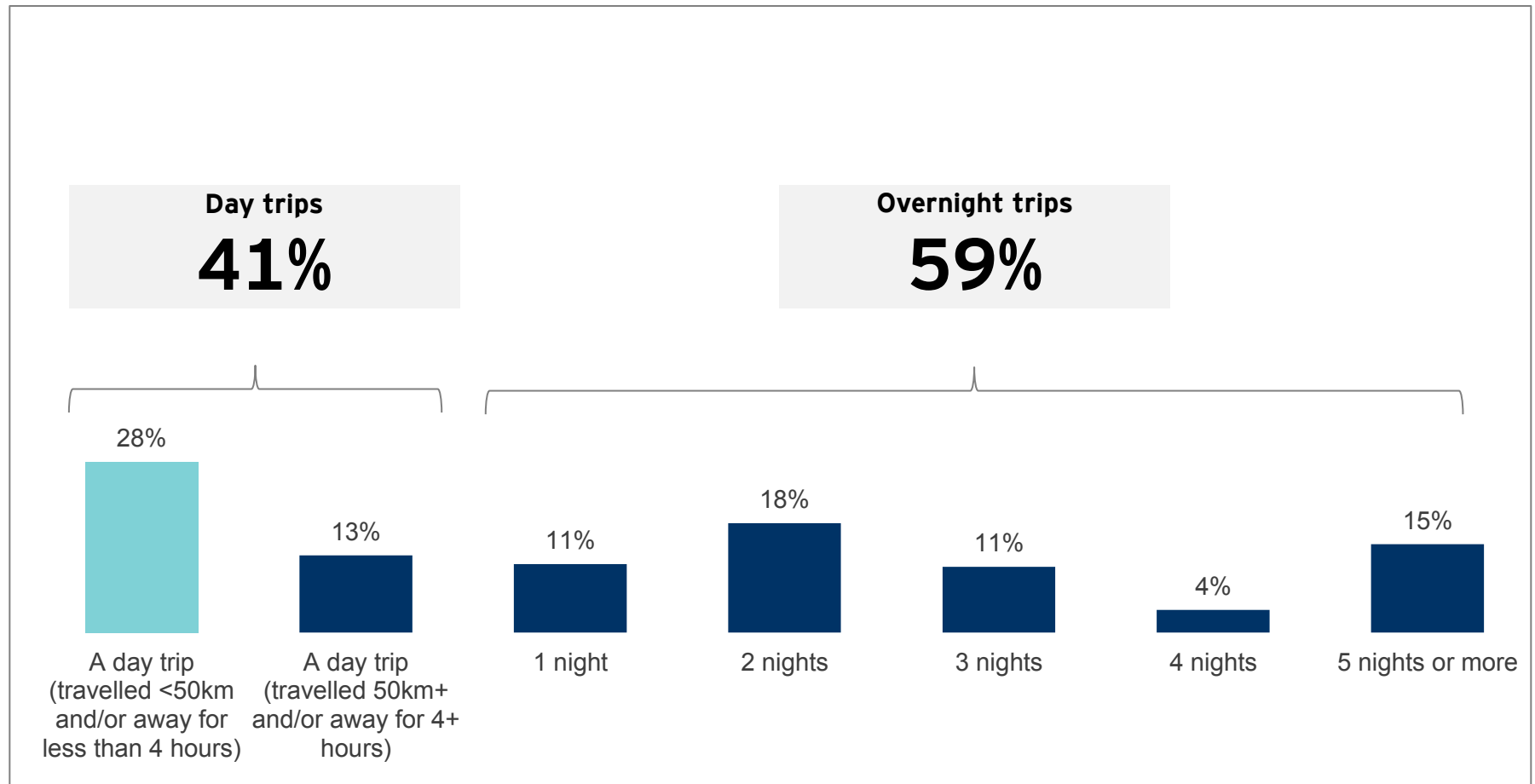
Q1c. When you take a holiday, short break or day trip that involves either participating in or spectating a cycling experience, is the trip **mostly...**

Base: Participants and Spectators *(n=562)

*Note that there is an overlap of participants and spectators, thus while the total number of participants and spectators is n=562, this is comprised of n=279 Participants, n=154 Spectators, and n=129 Participants AND Spectators

Typical trip duration for cycling experiences

- More than half of participants and spectators reported that they typically spend at least one night for their cycling tourism experiences, but short day trips were also common.



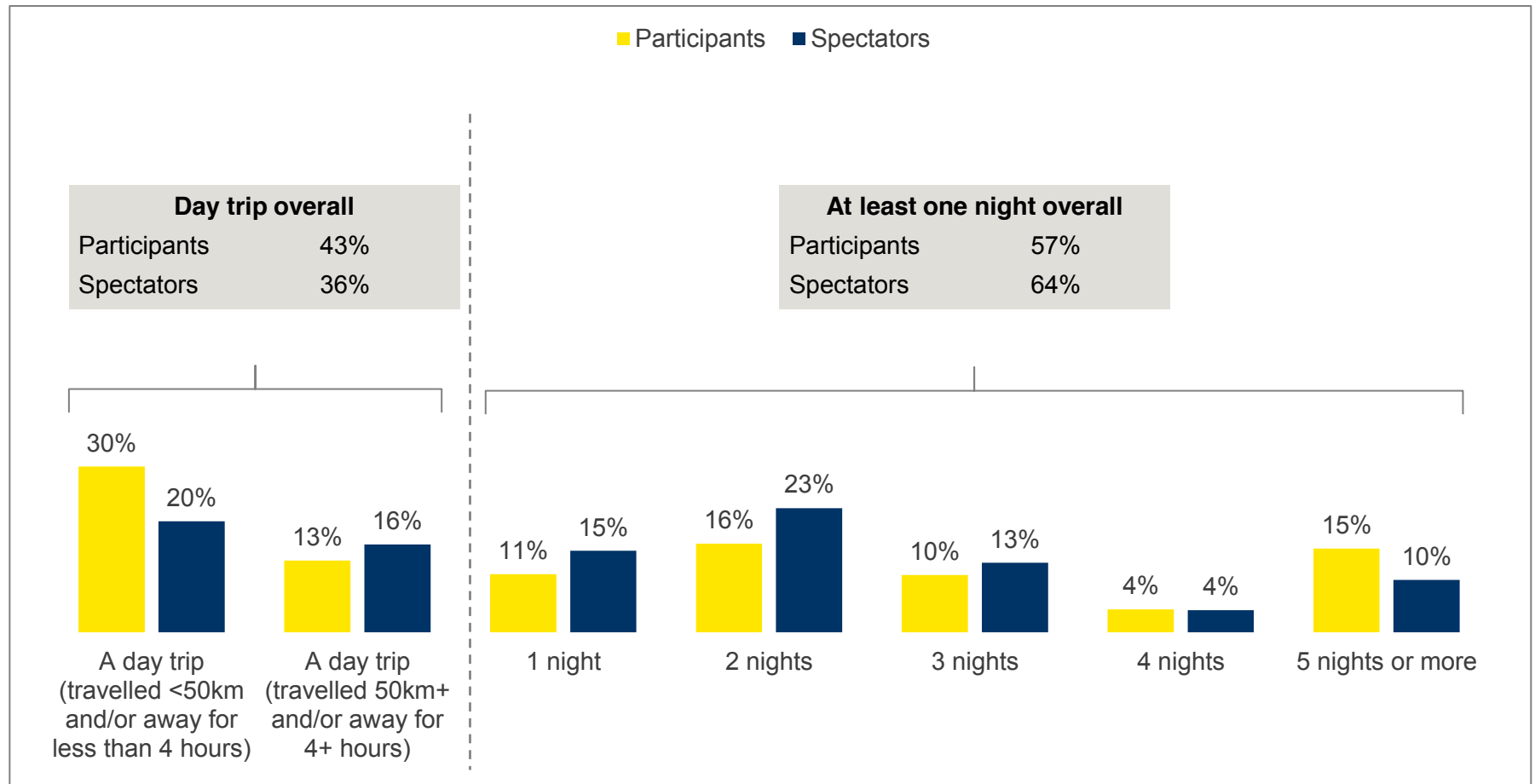
Q1c. When you take a holiday, short break or day trip that involves either participating in or spectating a cycling experience, is the trip mostly...

Base: Participants and Spectators* (n=562)

*Note that there is an overlap of participants and spectators, thus while the total number of participants and spectators is n=562, this is comprised of n=279 Participants, n=154 Spectators, and n=129 Participants AND Spectators

Typical trip duration for cycling experiences

- ▶ When participants travelled in the last two years for a cycling experience, for one in two (57%), it was mostly for one night or more. Two thirds (64%) of spectators attended an event/race during a trip of at least one night away from home.



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...**

*Note that there is an overlap of participants and spectators, thus while the total number of participants and spectators is n=562, this is comprised of n=279 Participants, n=154 Spectators, and n=129 Participants AND Spectators

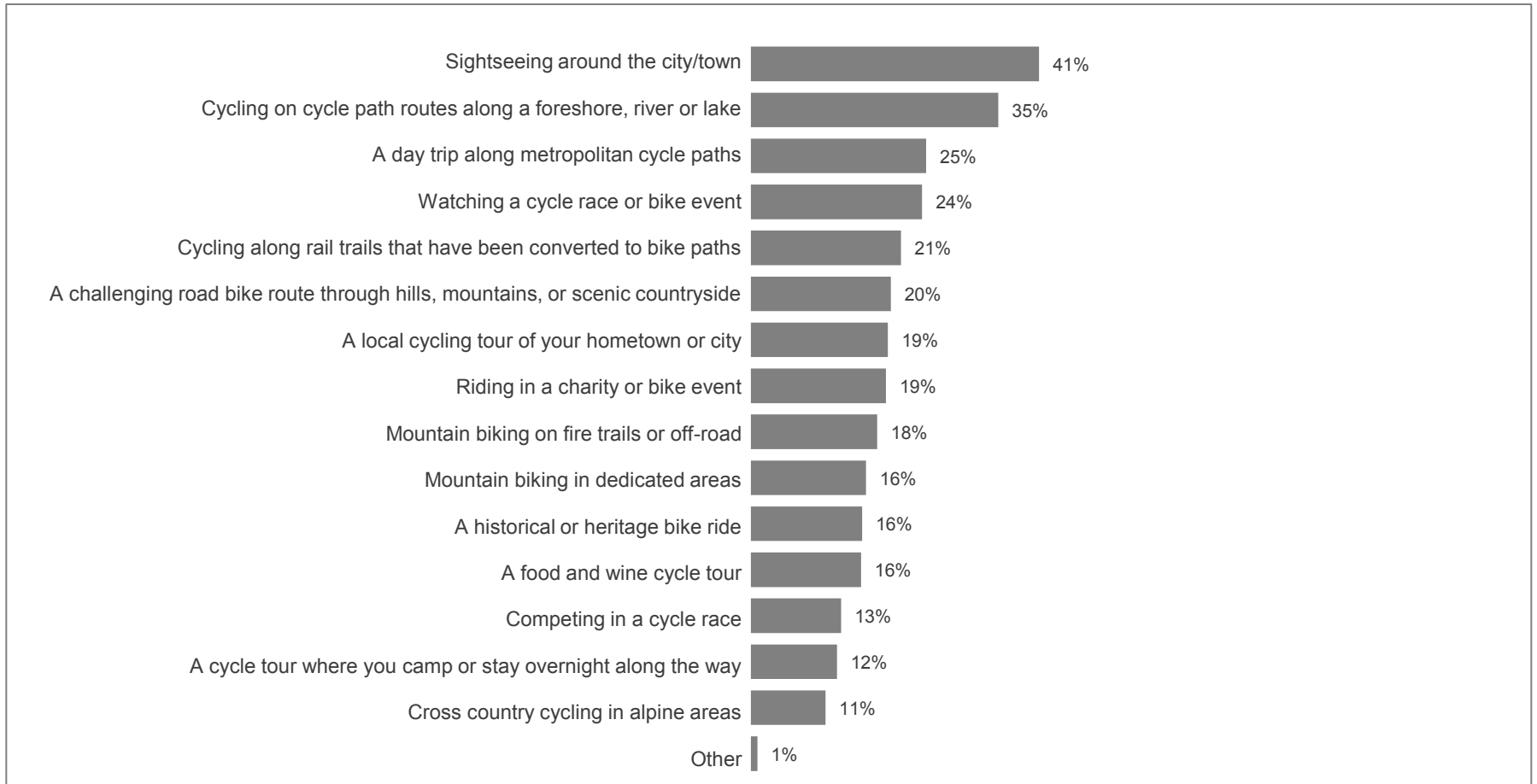
Base: Participants* (n=408), Spectators* (n=284)

Cycling experiences



Most common cycling experiences

- Across all Participants and Spectators, sightseeing around the city or town was the most common cycling experience. This was followed closely by cycling along path routes.

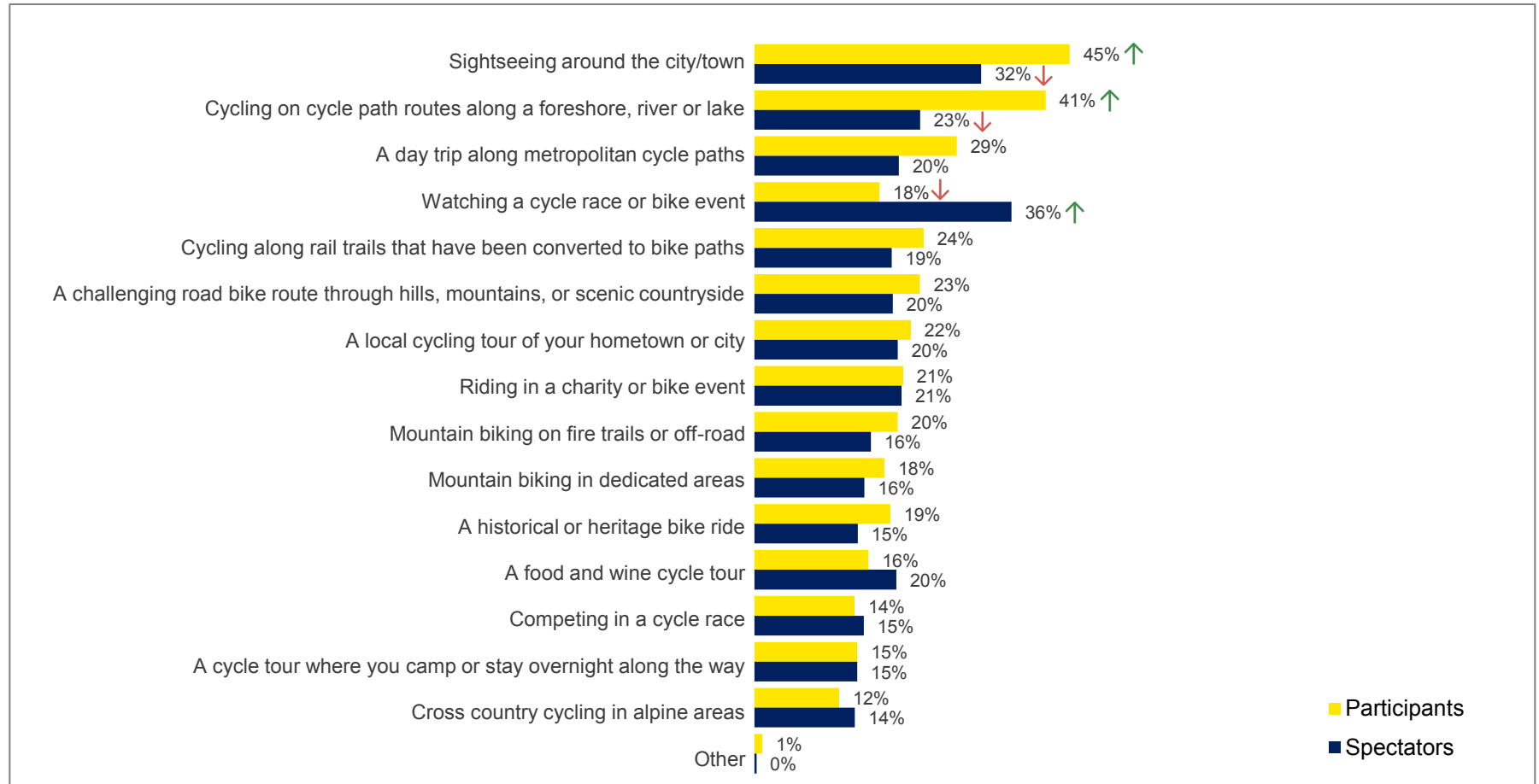


Q4. In the last two years, which of the following cycling experiences have you taken part in?

Base: Participants and Spectators (n=562)

Most common cycling experiences by type

- Over the past two years, there were significant differences between participants and spectators in their most common cycling experiences. Most notably, sightseeing around town and cycling along cycle paths were significantly more likely done by participants.



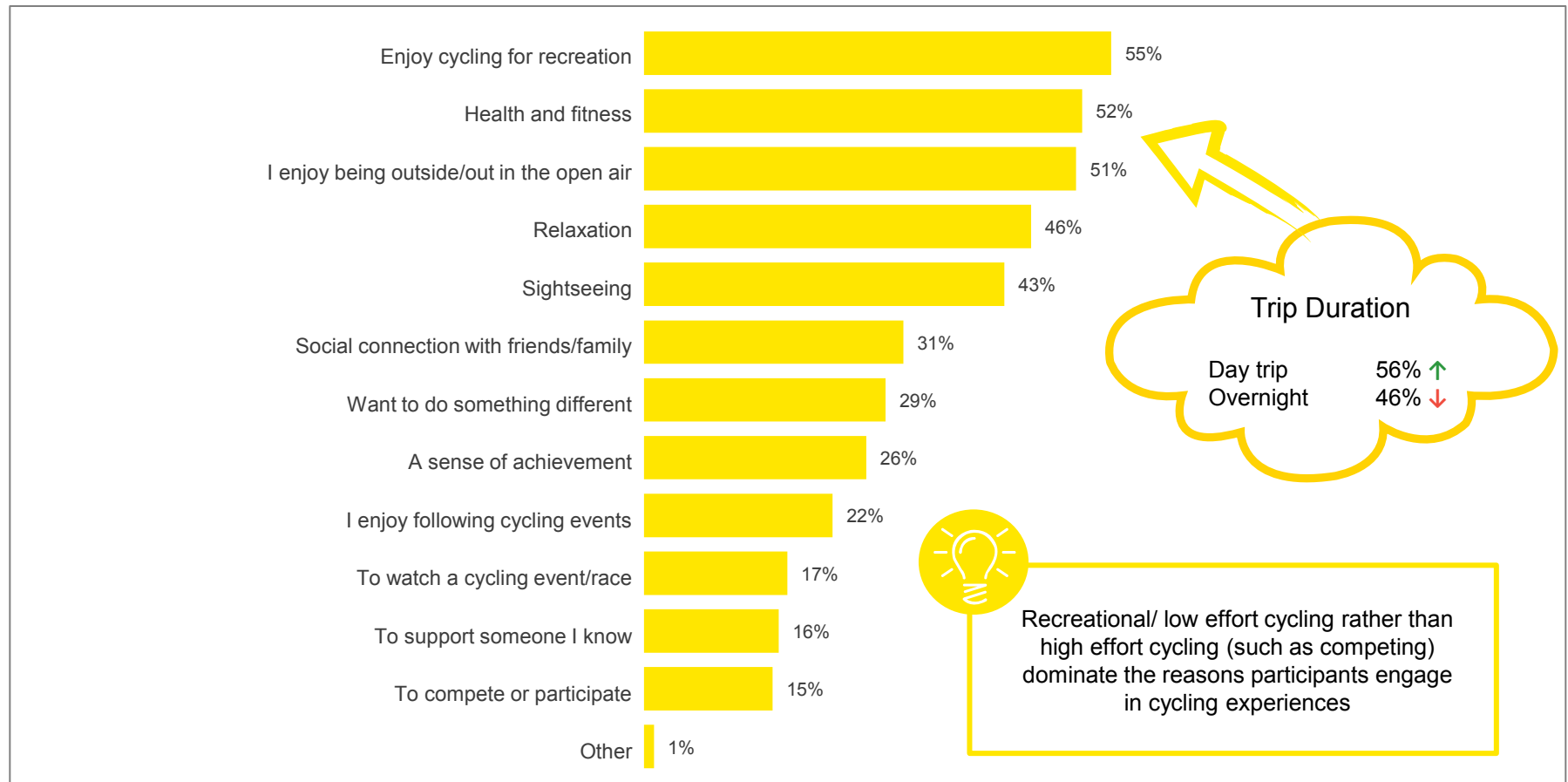
Q4. In the last two years, which of the following cycling experiences have you taken part in?

Note: Green arrow indicates significantly higher than the total and red arrow indicates significantly lower than the total

Base: Participants (n=408), Spectators (n=284)

Reasons for engaging in cycling experiences - Participants

- ▶ When it came to the reasons that participants engaged in cycling experiences, recreation, health and fresh air were the main drivers. Of these, those who did not spend the night at the destination (i.e. day trips) were significantly more likely to cite health and fitness as a reason to engage in the experience than those who stayed one night or longer.



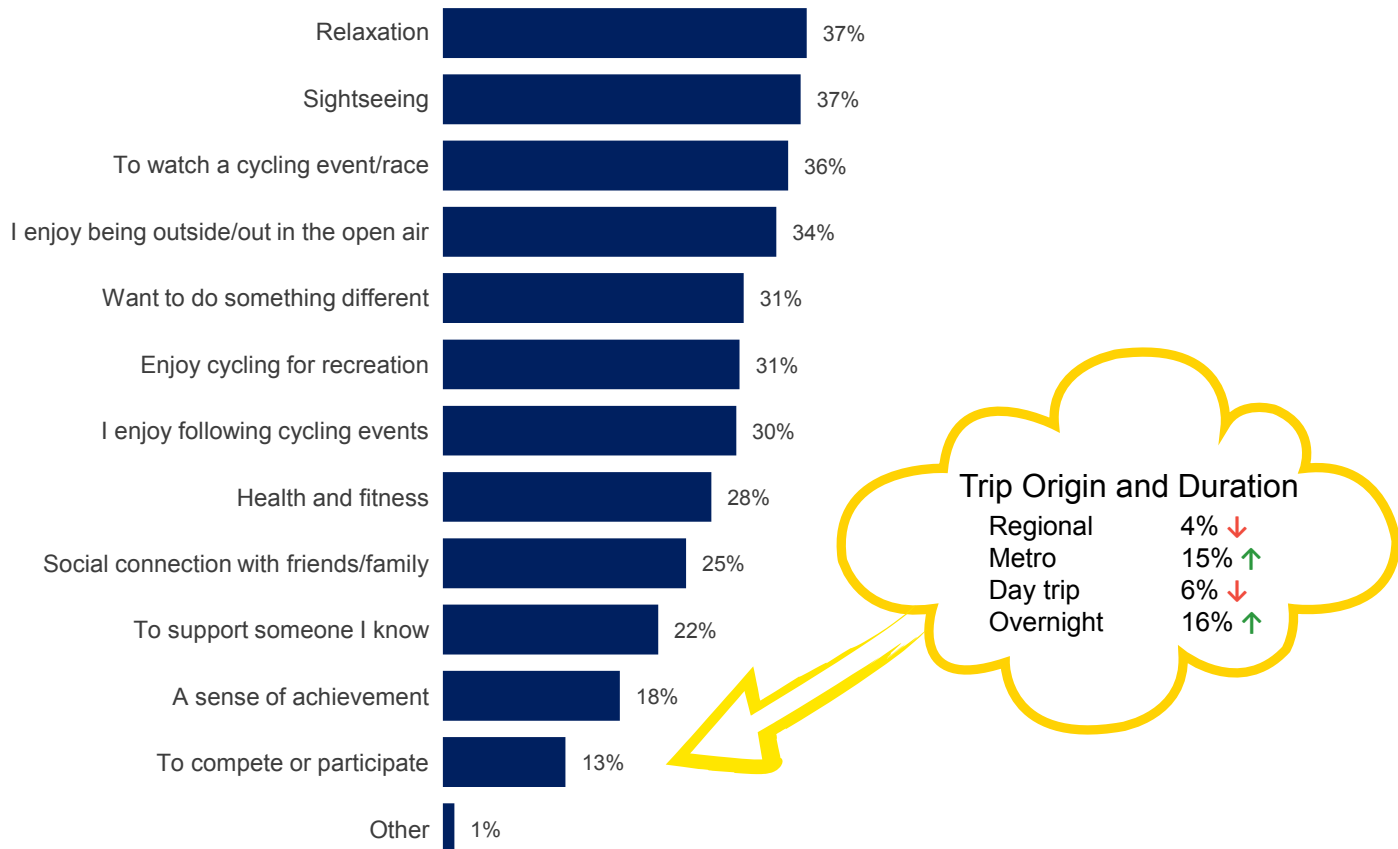
Q3. What are the reasons that you participate in cycling experiences or spectate cycling events/races?

Note: **Green** arrow indicates significantly higher than the total and **red** arrow indicates significantly lower than the total

Base: Participants (n=408)

Reasons for engaging in cycling experiences - Spectators

- Interestingly, spectating a cycling event to support someone they know or for social connection with friends/family were reasons that were not as common as relaxation, sightseeing or being outside in the open air. We also found that spectators from metropolitan locations were more likely to both participate and spectate and stay in their destination for one night or more.



Q3. What are the reasons that you participate in cycling experiences or spectate cycling events/races?

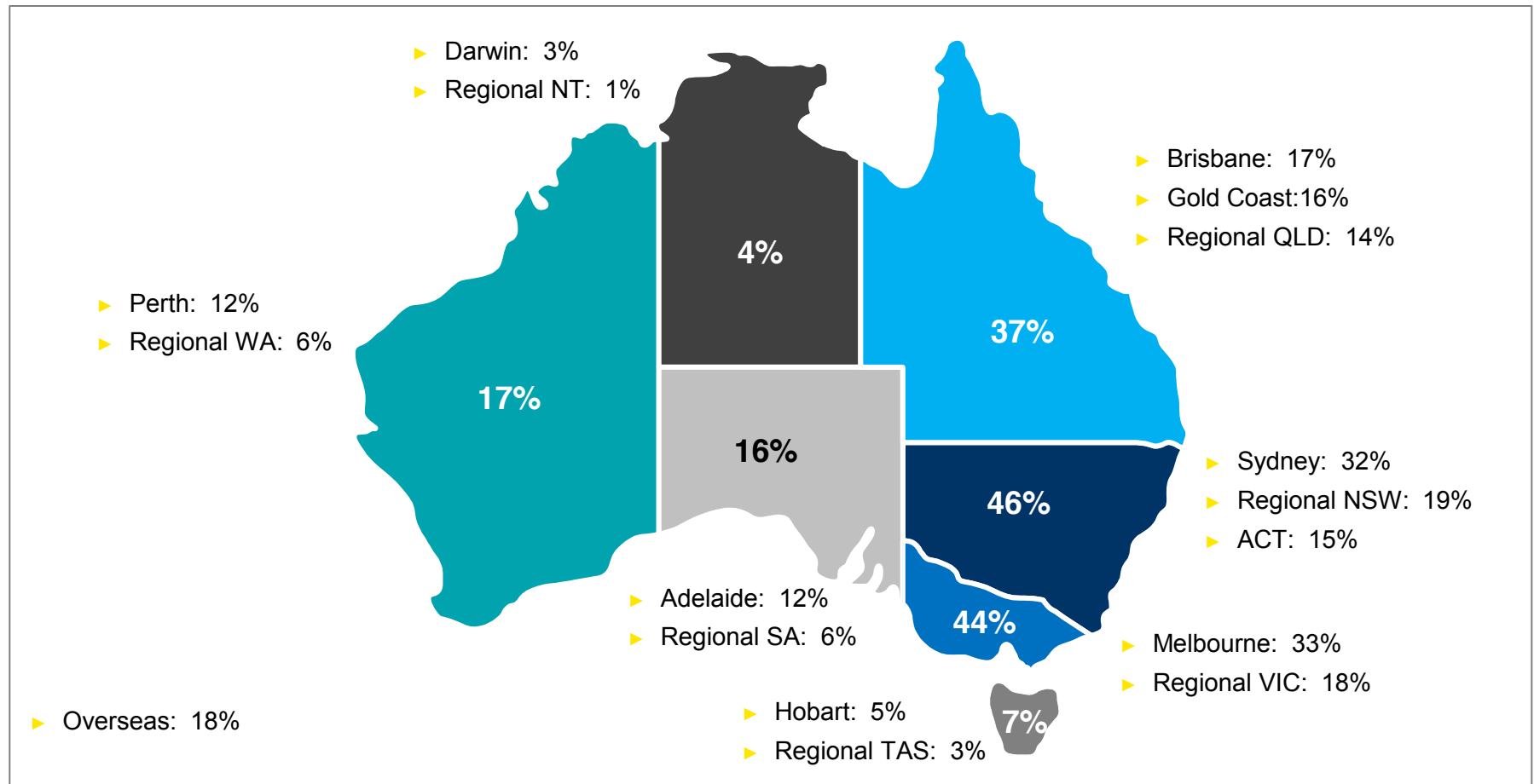
Note: **Green** arrow indicates significantly higher than the total and **red** arrow indicates significantly lower than the total

Base: Spectators (n=284)

Cycling destinations

Destinations for cycling experiences - Participating

- ▶ Participation, at a state level, was highest in New South Wales (46%) and Victoria (44%). Almost one in five (18%) have participated in a cycling experience overseas, demonstrating the level of cycling engagement in this group.



Q2a. Which of these locations have you visited for a holiday, short break or day trip that included you participating in a cycling experience in the last 2 years?

Base: Participants (n=408)

Destinations for cycling experiences - Participating

- Participation was highest in Australia's two biggest cities; Melbourne (33%) and Sydney (32%). The results suggest that cycling tourists tend to limit their engagement close to home (considering that the majority of participants were from these cities). Over half (53%) of those who travelled to an interstate destination went to Melbourne.



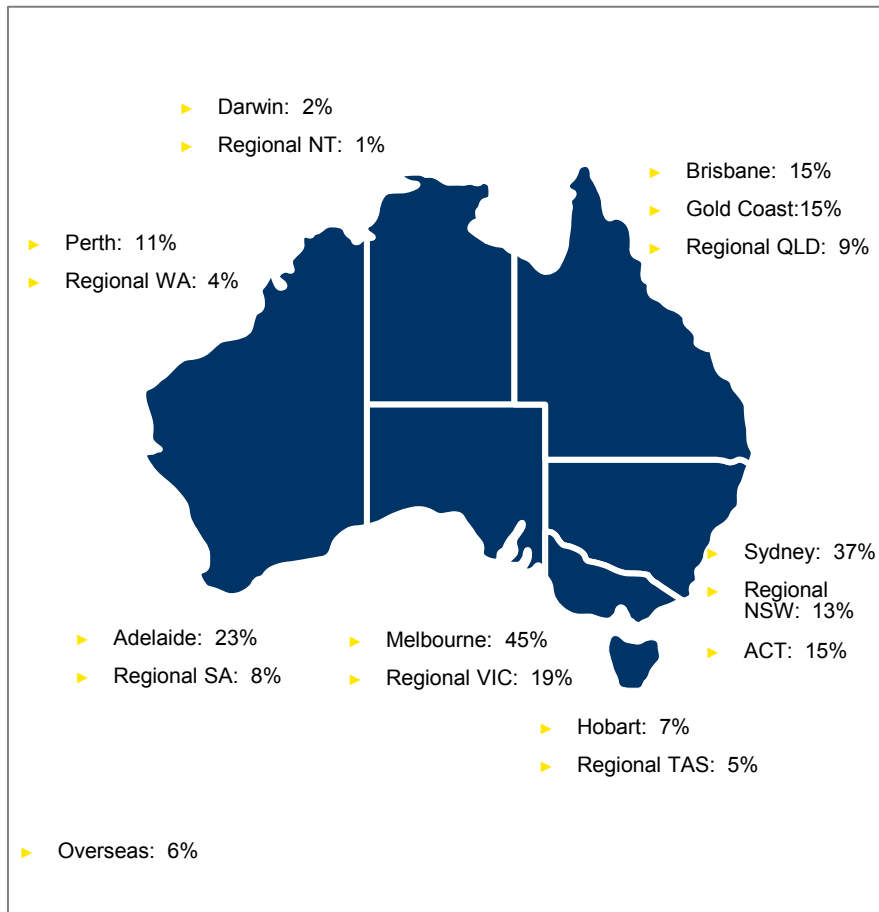
- Four in five (81%) of participants engaged in a cycling experience in the last two years at an intrastate destination. 57% had engaged at an interstate destination.
- Those from metro areas were significantly more likely to participate in metro destinations compared to regional destinations;
 - Melbourne 39% vs 17%
 - Sydney 40% vs 12%
 - Adelaide 34% vs 14%
- Those from regional areas compared to those living in metro areas were significantly more likely to participate in regional NSW (34% vs 14%) and regional QLD (25% vs 10%).
- Only regional Victoria (23% vs 19%) and regional NSW (24% vs 20%) had a higher proportion of participants from within their own state (intrastate) compared to those from outside the state (interstate).

Q2a. Which of these locations have you visited for a holiday, short break or day trip that included you participating in a cycling experience in the last 2 years?

Base: Participants (n=408)

Destinations for cycling experiences – Spectating

- ▶ Similar to participation destinations, Australia's two most populated cities were the two most common destinations for spectators; Melbourne (45%) and Sydney (37%).



- ▶ Almost half (47%) of spectators spent at least one night in Melbourne.
- ▶ Only Perth had a significantly higher proportion of overnight stayers than day trippers (15% vs 3%).
- ▶ Regional Victoria was the only regional area in Australia that had a significantly higher proportion of spectators originating from regional areas than metro areas (38% vs 13%).
- ▶ Regional areas tended to have a higher (but not significant) proportion of day trippers than those staying overnight.
- ▶ **This presents a challenge to regional destinations to develop offerings that will attract cycling event spectators to stay overnight.**

Q2b. Which of these locations have you visited for a holiday, short break or day trip that included you spectating a cycling event/race in person in the last 2 years?

Base: Spectators (n=283)

Victorian Cycling Destinations

Melbourne as a cycling destination

- ▶ Cycling trips to Melbourne were primarily driven by overnight trippers (**77% vs. 23%**) – although less so compared to regional Victoria.
 - This was consistent to Sydney (**77% vs. 23%**).
- ▶ Of those travelling to Melbourne, less than two thirds were from the intrastate market (**57%**) with higher proportions from the interstate market (**43%**) when compared to regional Victoria.
 - In Sydney the intrastate market was considerably stronger (**77%**) than the interstate market (**23%**).
- ▶ Greater proportions of those from metro origins were visiting Melbourne (**83%**) for a cycle trip while less were coming from a regional origin (**17%**).
 - When compared to Sydney, almost all of visitors were from a metro origin (**99%** and **1%** from regional origins).



Victorian Cycling Destinations

Regional VIC as a cycling destination

- ▶ Cycling trips to regional Victoria were primarily driven by overnight trippers rather than those travelling for the day (**87% vs. 13%**).
 - This was similar to regional NSW (**79% vs. 21%**) but in regional NSW this was less of the case.
- ▶ Of those travelling to regional Victoria, two thirds were from the intrastate market (**68%**) leaving one third from the interstate market (**32%**).
 - In regional NSW there was more of a market from the intrastate market (**91%**) and less from the interstate market (**9%**).
- ▶ Similar proportions of those from metro/regional origins were visiting regional areas (**46% and 51%, respectively**) for a cycle trip. This was in line with those visiting regional NSW.



A view of the most recent cycling experience

Narrowing the focus to the most recent experience

- The previous section gives us a broad overview of the incidence of engagement with cycling tourism over the past two years. However, to truly understand engagement in cycling tourism, this section focuses on the most recent cycling experience of those surveyed as this is arguably most reflective on their current practices. We also tease out the demographic, behavioural and attitudinal differences between those who can be considered cycling tourists and those who's most recent cycling experience was local in nature.



Definitions for respondents in the sample for recent trips

- As with engagement over the last two years, we categorised respondents into five distinct groups based on their most recent experience...



Recent participants

A day trip which involved travelling 50km or more in total and/or was more than four hours away from home (includes overnight (stays) AND that included participating in a cycling experience



Recent Spectators

A day trip which involved travelling 50km or more in total and/or was more than four hours away from home (includes overnight stays) AND watched a cycling activity in person while on a holiday or trip



Recent local cyclists

A day trip which involved travelling less than 50km in total AND away for less than four hours away from home AND their last holiday, short break or trip that included a cycling experience (participated/ spectated)



Non-cyclists

Had been on a holiday or trip in the last 2 years AND had not participated in/spectated a cycling activity while on a holiday or trip away from home



Non-travellers

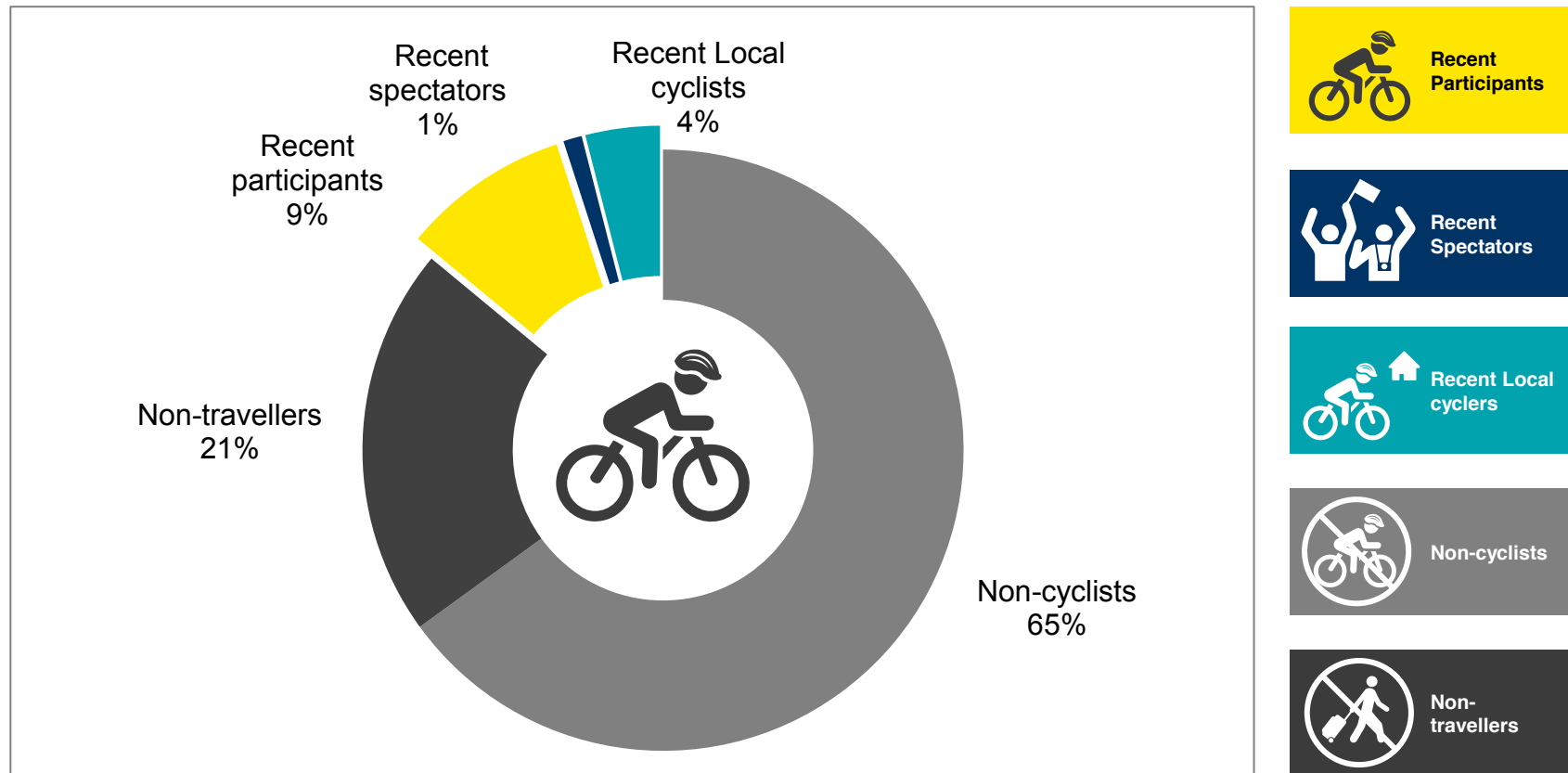
Had not been on a holiday or trip in the last 2 years

S6. Have you been on a holiday, short break or day trip...

S7. Now thinking about your holidays, short breaks or day trips away from home in the last 2 years, did any of them include a cycling experience?

Incidence of cycling tourists - most recent experience

- ▶ Based on their last cycling experience within the last two years, 14% of those surveyed had taken part in some kind of activity. Of these, 4% had taken part at a local level (i.e. less than 50km+ and less than four hours) and were deemed 'local cyclists'.
- ▶ Of those who had travelled 50km+ or four hours or more away from home for their last cycling experience or spent at least one night away, 9% were classified as recent participants and 1% as recent spectators.



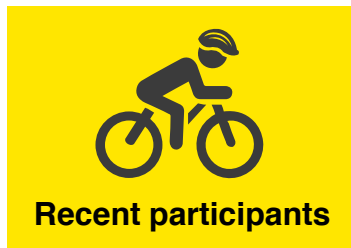
Q5. Now thinking about your **last** cycling experience, where did it occur?

Q6. How long was your holiday, short break or day trip that included the cycling experience?

Base: Total Sample (n=2,000)

Summary

- ▶ Of those surveyed, 4% were defined as recent local cyclists based on their most recent cycling experience, while the proportion of spectators is 1%. One in ten (9%) were considered a recent participant.



9%

- ▶ **Three quarters** of recent participants were from metro areas.
- ▶ In their last cycling experience, **six in ten** recent participants visited a metro destination and **27%** visited a regional destination.
- ▶ They were significantly more likely than spectators or local cyclists to love **fine wine, going to the best restaurants (68%)** and taking part in **outdoor activities in natural environments (82%)**.
- ▶ **Health and fitness, relaxation** and **sightseeing** were the main reasons for engaging in a cycling experience for them.



4%

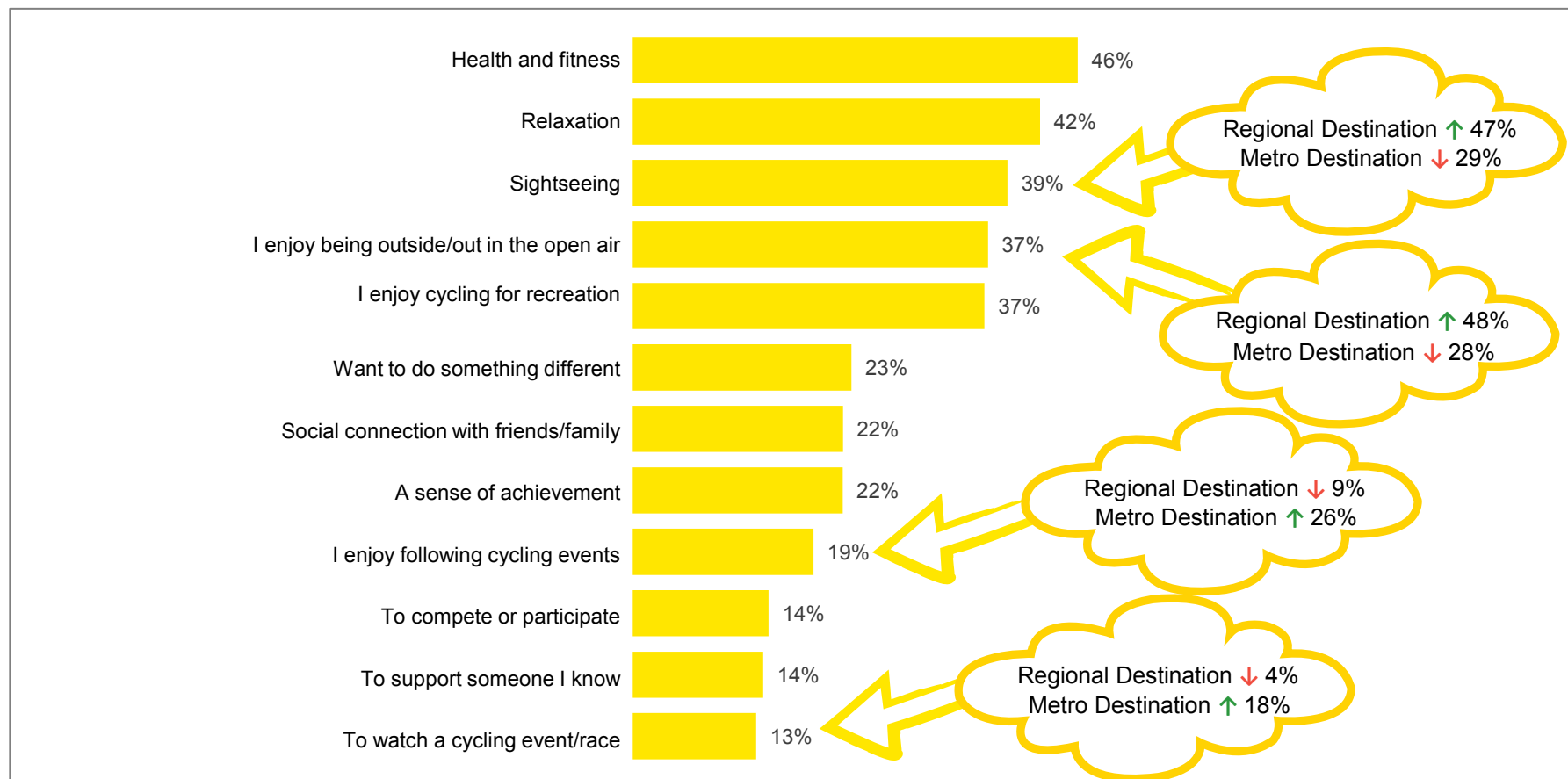
- ▶ **Eight in ten (78%)** local cyclists said it's important to have a wide range of activities and experiences available on holiday.
- ▶ **96%** of local cyclists would consider a holiday in the next five years that included a cycling experience, compared to **93% of recent participants**.
- ▶ For many, **cycling is a passion or hobby** with more local cyclists owning a bike than recent participants.
- ▶ In terms of their attitudes towards life and leisure, local cyclists lie somewhere in between tourists who lie on a beach and do nothing, and thrill seekers. **The relaxation combined with activity that cycling offers on a holiday is well suited to local cyclists.**



1% Were defined as recent spectators

Main reasons for most recent cycling experience

- ▶ Almost half of recent participants (46%) reported health and fitness as the main reason for engaging in the activity. The other top reasons were relaxation, sightseeing, enjoying being outside and cycling for recreation. Those who went to a metro destination were less inclined to go for sightseeing purposes or to be out in the open air than regional destinations which shows the nature-based pull of these areas.



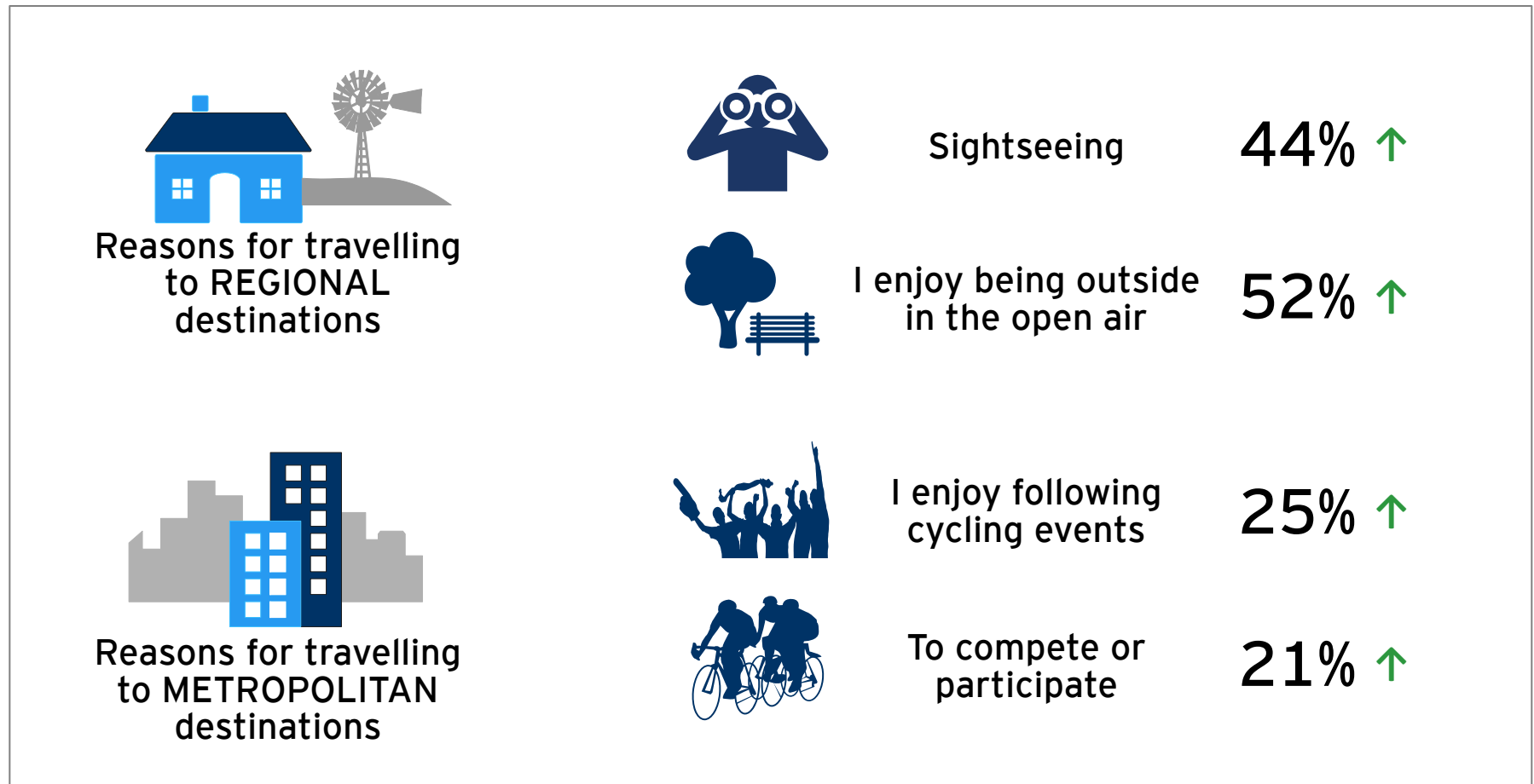
Q10. What were the **main** reasons for undertaking the (most recent) cycling experience?

Base: Recent participants (n=369)

Note: **Green** arrow indicates significantly higher than the total and **red** arrow indicates significantly lower than the total

Main reasons for the most recent participant experience

- When considering reasons for travelling to regional vs. metropolitan destinations (as a participant), regional participants were significantly more likely to travel for sightseeing or being outside.



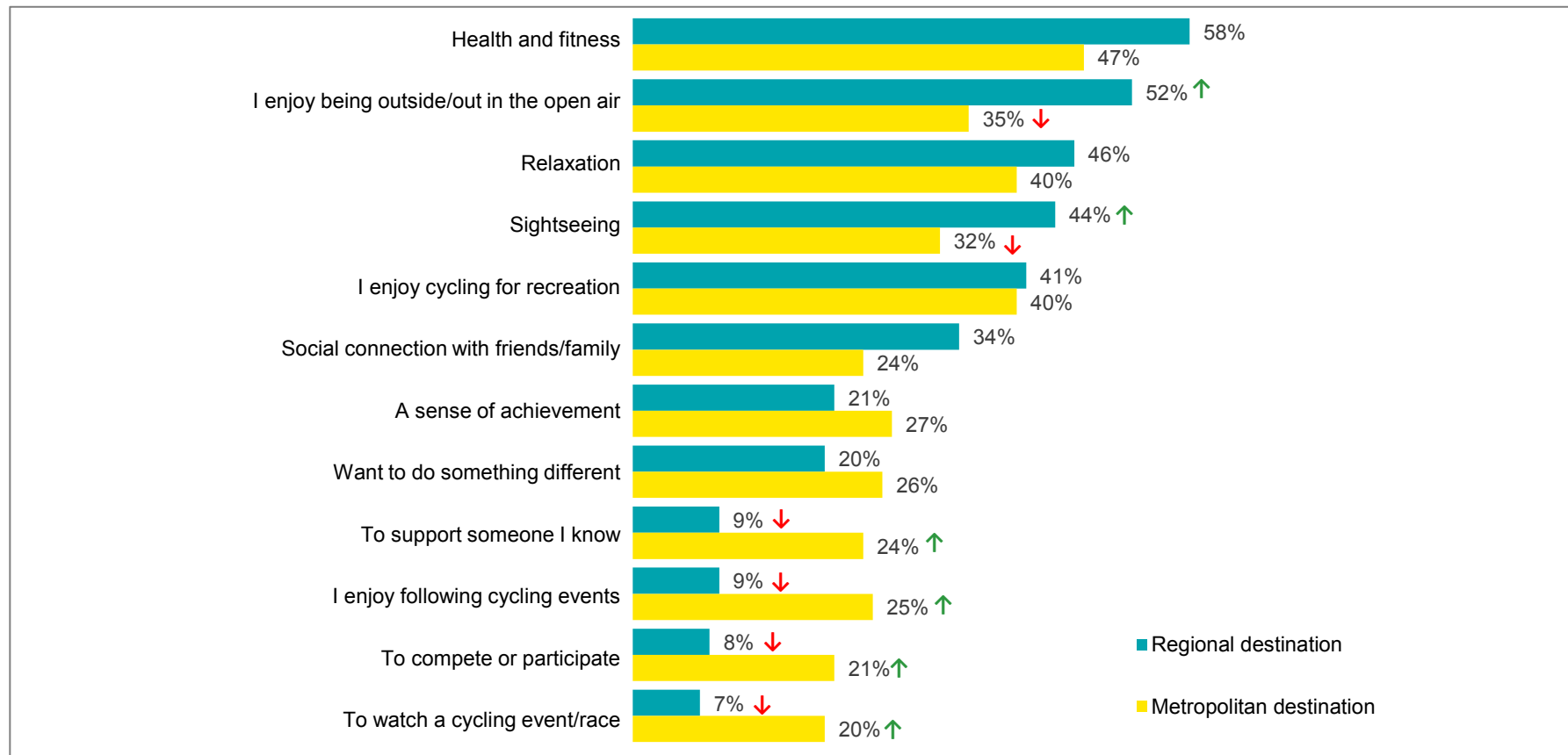
Q10. What were the main reasons for undertaking the (most recent) cycling experience?

Note: **Green** arrow indicates significantly higher than the total and **red** arrow indicates significantly lower than the total

Base: Participants travelling to a regional destination (n=91), Participants travelling to a metropolitan destination (n=277)

Main reasons for most recent participant experience

- ▶ Overall, the main reason for participants travelling to a metropolitan (47%) and regional (58%) destination for their most recent cycling experience was health and fitness.
- ▶ Those travelling to a regional destination were significantly more likely to do so for enjoying the open air (52%) and sightseeing (44%) than those travelling to a metropolitan destination.



Q10. What were the **main** reasons for undertaking the (most recent) cycling experience?

Note: **Green** arrow indicates significantly higher than the total and **red** arrow indicates significantly lower than the total

Base: Participants travelling to a regional destination (n=91), Participants travelling to a metropolitan destination (n=277)

Recent participant overview

Recent participants:

- ▶ **Two thirds (66%)** of recent participants were male and six in ten were 18-34 years old.
- ▶ **Over eight in ten (83%)** spent at least one night on their last cycling experience.
- ▶ Almost **eight in ten (77%)** considered themselves to be confident cyclists
- ▶ They were significantly more likely than spectators or local cyclists to love fine wine and going to the best restaurants (**68%**) and love outdoor activities in natural environments (**82%**)
- ▶ Health and fitness, relaxation and sightseeing were the main reasons for engaging in a cycling experience
- ▶ **Three quarters** were from metropolitan areas.
- ▶ In their last cycling experience, **six in ten** visited a metro destination and **27%** visited a regional destination.
- ▶ **93%** would consider a holiday, short break, or day trip that included cycling as part of their activities in the next five years.

Recent participants

A day trip which involved travelling 50km or more in total and/or was more than four hours away from home



9%

Their last holiday, short break or trip that included participating in a cycling experience

Recent participant profile - attitudes

- Four in five (82%) enjoy participating in physical activities and were significantly more likely than recent local cyclists to love outdoor activities in natural environments, such as bushwalking, cycling or fishing. Despite their love for the outdoors and physical activities, recent participants also enjoy more indulgent leisure activities such as fine wine and food, spa treatments and relaxing by a beach or pool.

Key attitudes		Key attitudes	
Base:	369	Base:	369
I enjoy participating in physical activities	82%	I am a confident cyclist	77%
It is important to have a wide range of activities and experiences available on holiday	82%	I love going back to the same places for my short breaks/holidays	71%
I love outdoor activities in natural environments, such as bushwalking, cycling or fishing	82%↑	I put what my family/companion(s) wants ahead of my own preferences	69%
I enjoy short breaks that are close enough to drive to	81%	I love fine wine and going to the best restaurants	68%↑
I love weekend escapes	81%	I enjoy thrill seeking and adventure type activities, such as rock climbing	67%↑
I enjoy going overseas and experiencing different cultures	80%	I like to pamper myself with spa treatments or massages	65%↑
Keeping my family/companion(s) happy and entertained is important	80%	My idea of a perfect holiday is lying on a beach or by the pool doing nothing	62%↑
Low cost airfares mean I'm able to take more interstate or overseas trips than I used to	76%		

93% would consider a holiday or short trip that included a cycling experience in the next 5 years

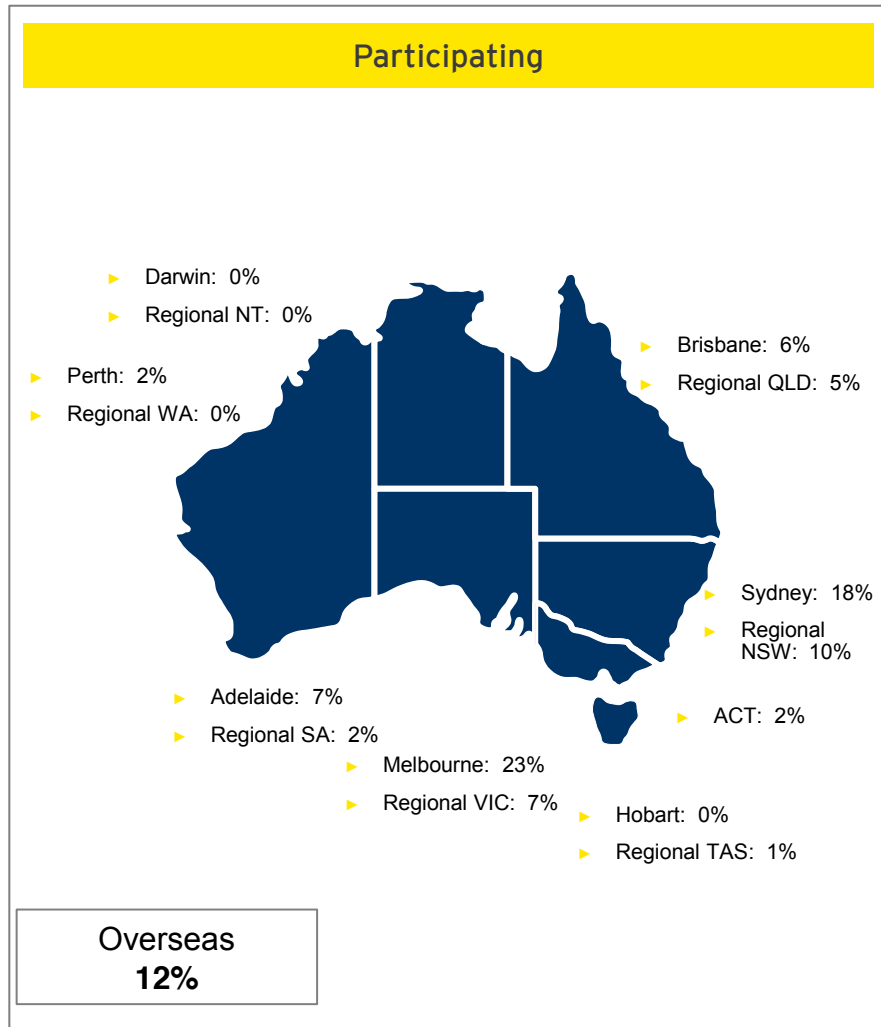
Q21. To what extent do you agree or disagree with the following statement...

Base: Recent participants (n=369)

Q34. Thinking about your attitudes to life and leisure activities, to what extent do you agree or disagree with each of the following statements?

Note: **Green** arrow indicates significantly higher than the total and **red** arrow indicates significantly lower than the total

Most recent cycling experience destination – Recent participants



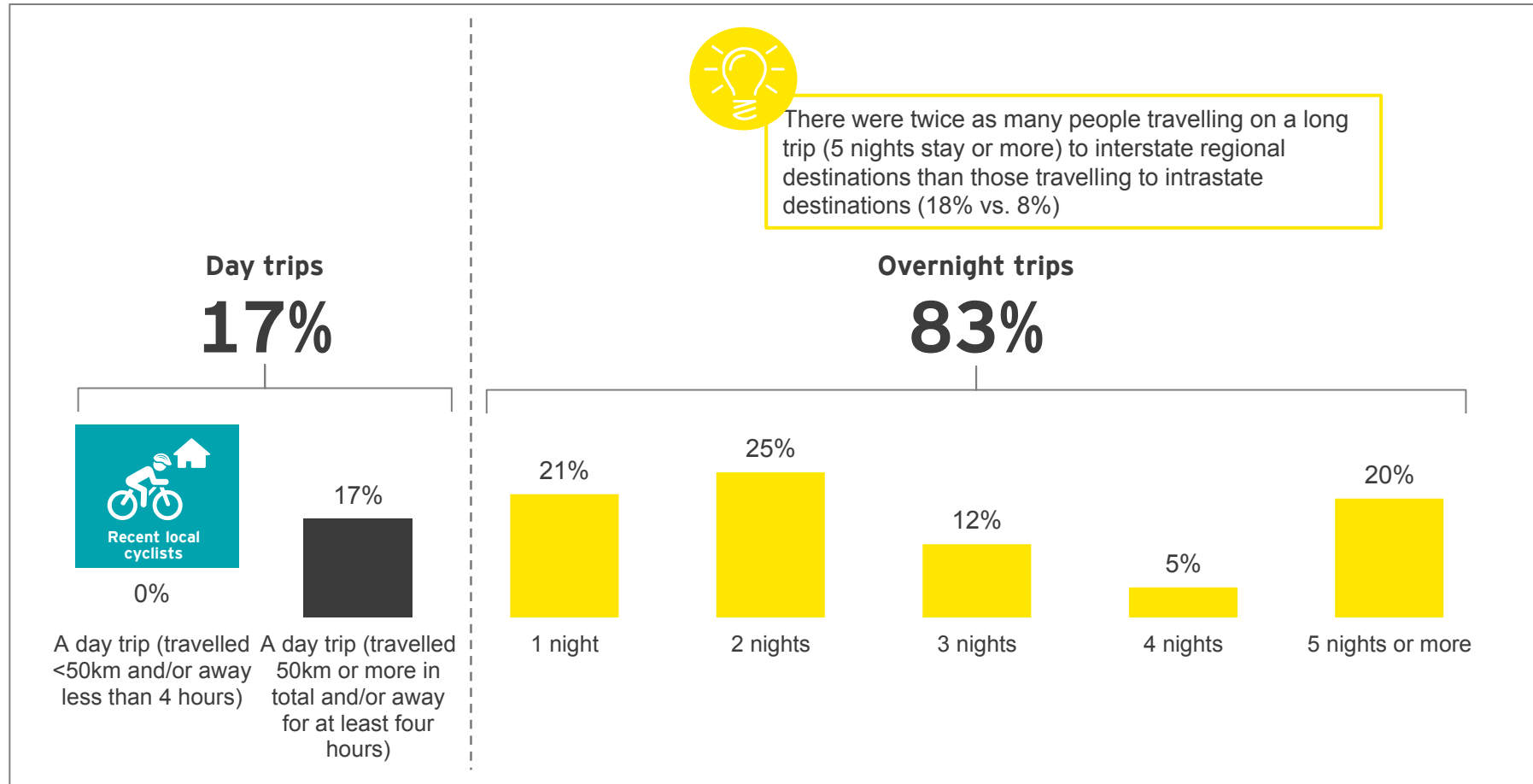
- ▶ In their last cycling experience, six in ten (61%) recent participants visited a metro destination and a quarter (27%) visited a regional destination. A further 12 per cent went to an overseas destination.
- ▶ 21% of interstate cycling experiences occurred at regional destinations compared to 35% for intrastate travel.
- ▶ Conversely, 79% of interstate cycling experiences occurred at metro destinations compared to 65% for intrastate travel.
- ▶ Those travelling interstate to Melbourne were significantly more likely to spend at least one night away compared to those travelling interstate to Sydney (41% vs 14%).

Q5. Now thinking about your **last** cycling experience, where did it occur?

Base: Recent participants (n=369)

Trip duration of last cycling experience – Recent participants

- The majority of trips that featured a cycling experience included at least one overnight stay. Of those overnight holidays, breaks, and day trips, most were either one or two nights stay. There was however a significant proportion where the trip duration was at least five nights.

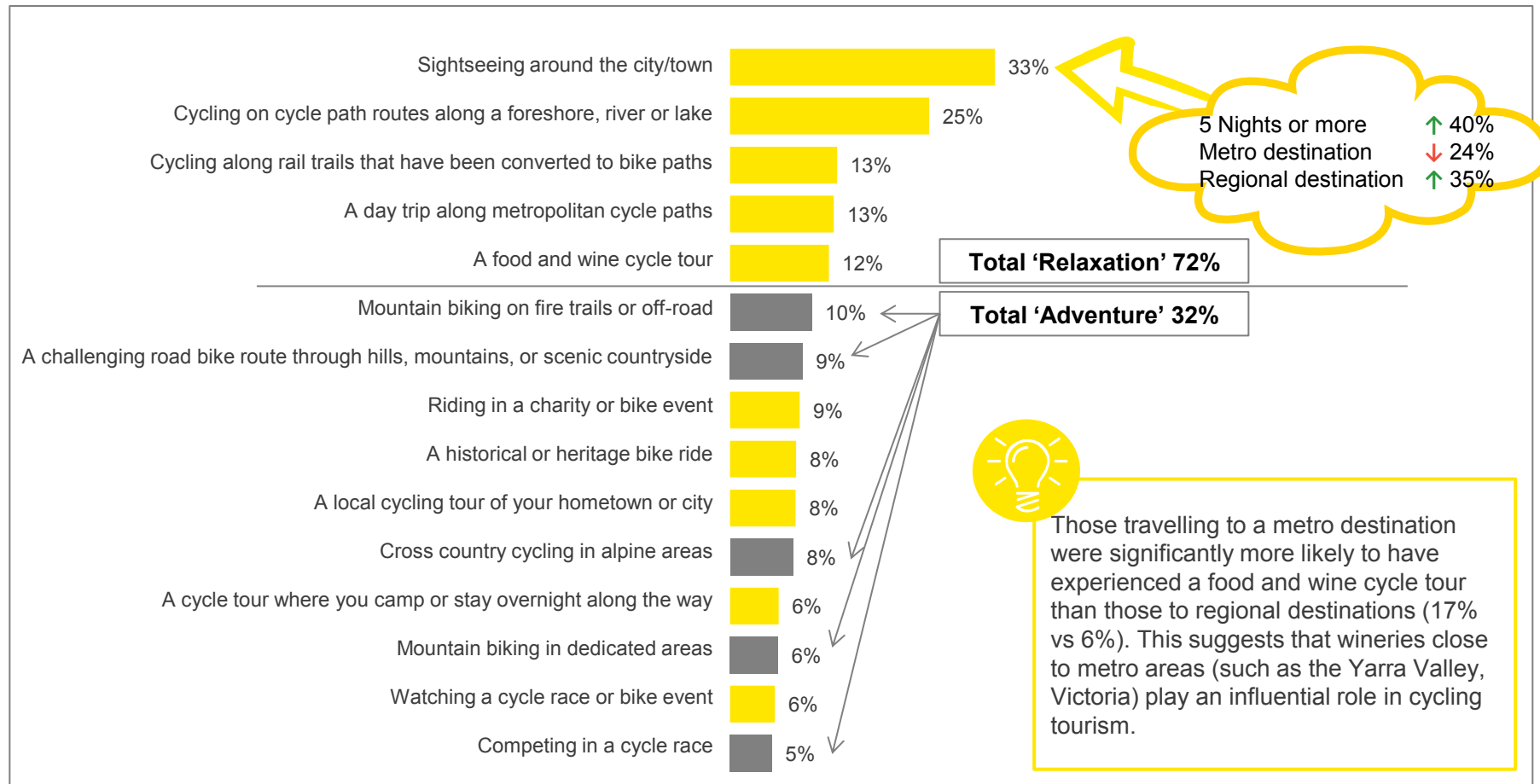


Q6. How long was your holiday, short break or day trip that included the cycling experience?

Base: Recent participants (n=369)

Most recent type of experience - Recent participants

- The type of experiences undertaken by recent participants were mainly based around relaxation, low intensity activity and sightseeing. Among those who stayed 5 nights or more, sightseeing was significantly higher at 40 per cent. Adventure and thrill seeking experiences were also popular, but to a lesser extent.



Q7. What type(s) of cycling experience was this?

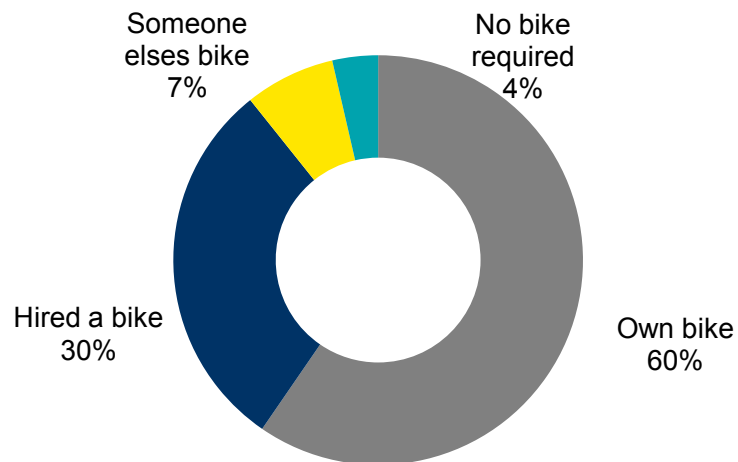
Note: **Green** arrow indicates significantly higher than the total and **red** arrow indicates significantly lower than the total

Base: Recent participants (n=369)

Bicycle type for most recent cycling experience

Participating

- ▶ Three in five (60%) recent participants used their own bike and three in ten (30%) hired a bike. Seven per cent borrowed someone else's bike.
- ▶ The most common types of bikes used were mountain (46%) and road (49%) bikes.



- ▶ Those who travelled to an intrastate destination were significantly more likely to use their own bike than interstate tourists (72% vs 59%)
- ▶ A similar result was observed for those travelling for the day; they were significantly more likely to use their own bike (75%), compared to those staying overnight (56%).
- ▶ A third (32%) used hybrid bikes, which seems high but considering most were visiting metro areas it is less surprising.
- ▶ The proportion of those who hired a bike was higher for
 - Females (38%)
 - those aged between 55 and 69 (40%) and
 - from ACT (43%) or NSW (36%).
- ▶ Those who hired a bike were also significantly more likely to have travelled to a regional destination (37%) signifying the importance for these areas to have hire capabilities.

Most common bicycle types used...



Road

49%



Mountain

46%



Hybrid

32%



BMX




11%

Q8. Did you use your own bike, hire a bike or use someone else's bike?
Q9. What type of bike(s) did you mainly use?

Base: Recent participants (n=369)

Role of the cycling experience in holiday/trip

- Participation in the cycling experience was the main reason for going on the holiday, short break or day trip and also the choice of destination for three in five (59%) recent participants. Given that recent participants by definition were relatively highly engaged in cycling tourism (having engaged in cycling tourism in the last two years), this shows the propensity of cycling as being a major driver for some.
- When it comes to choosing a destination from a metro/regional perspective, there was a significant difference in the role that cycling plays in decision-making. Three quarters (74%) of those visiting metro areas (on their last trip) reported that cycling was the main reason for the choice in destination, compared to 53% for those going to regional destinations (which suggests a combination of factors were taken into account when planning a cycling trip to regional areas).

	 Cycling tourists	 Metro destinations	 Regional destinations
Cycling the main reason to go on the trip	64%↑	80%↑	58%↑
Cycling the main reason to go to the destination	62%↑	77%↑	58%↑
Cycling was not the main reason for the experience	33%↓	23%↓	37%↓

Q11a. And when it came to the reason for the holiday, short break or day trip, the **cycling experience** was...

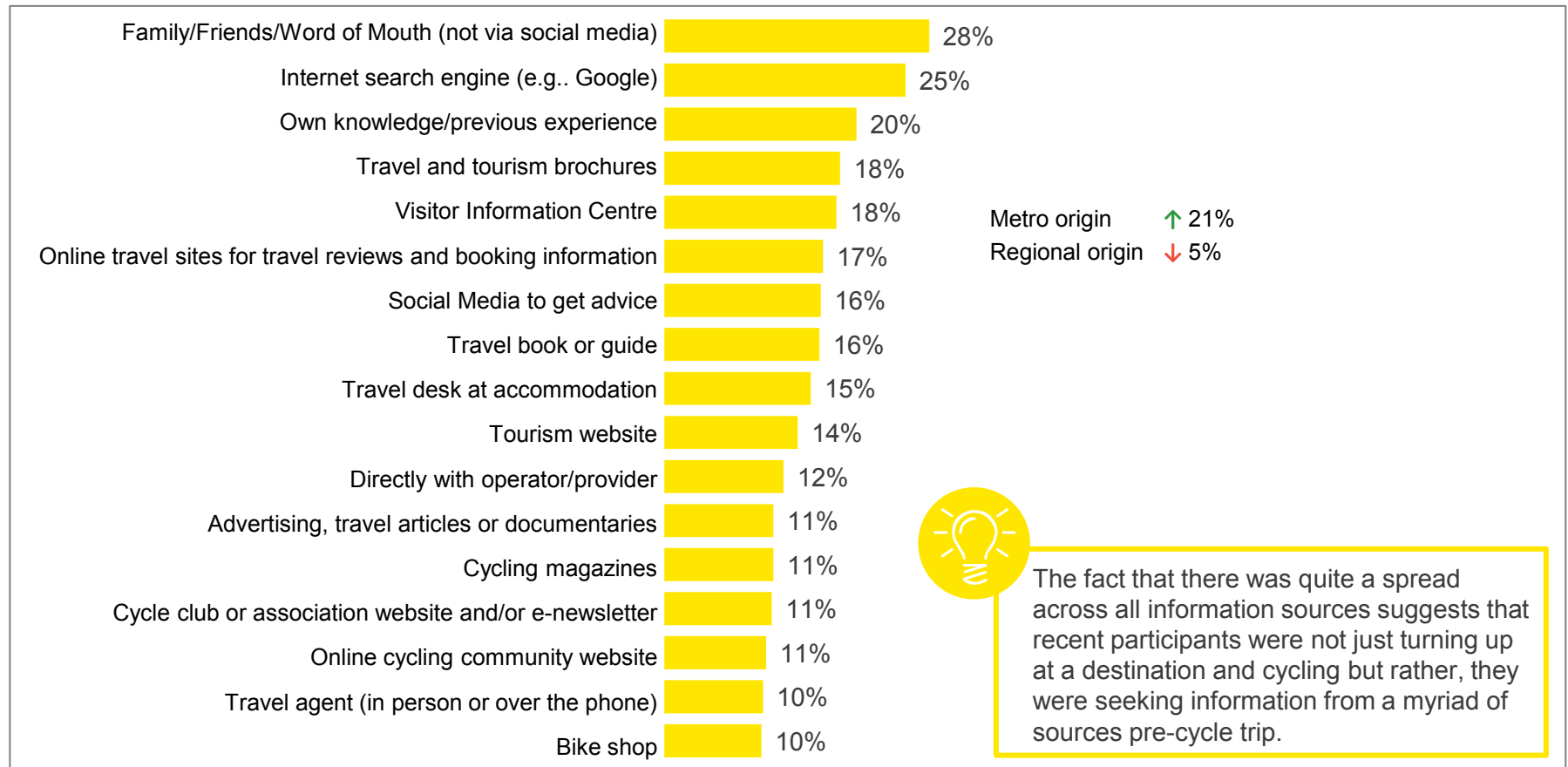
Q11b. Which of the following best describes why you visited [**LOCATION – Q5**]?

Note: **Green** arrow indicates significantly higher than the total and **red** arrow indicates significantly lower than the total

Base: Recent Participants excl. Recent Dual Engaged Spectators/Participants (n=344)

Top 10 sources of information for a cycling experience

- When it came to planning and booking their last cycling trip, recent participants relied on word of mouth from trusted sources (family/friends) followed by a general internet search. This suggests that some recent participants did not know which relevant websites to visit when searching for cycling information online. Among those who travelled to a metro destination, online travel sites were significantly more likely to be utilised than those who visited a regional destination.



Q12. What sources did you use for planning and booking this cycling experience?

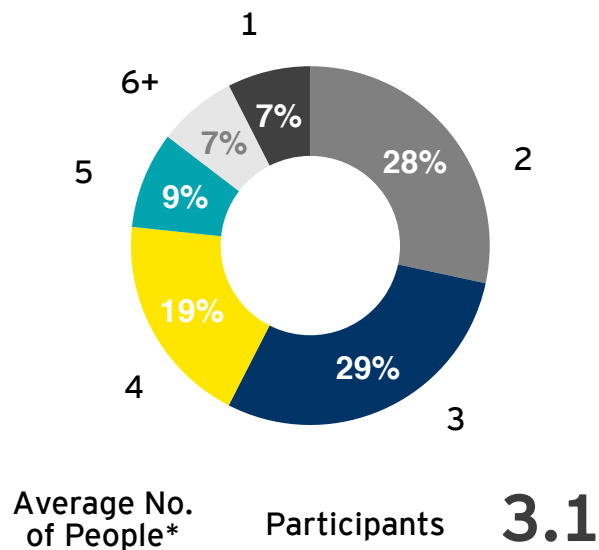
Base: Recent participants (n=369)

Note: Green arrow indicates significantly higher than the total and red arrow indicates significantly lower than the total

Most recent cycling experience - trip companions

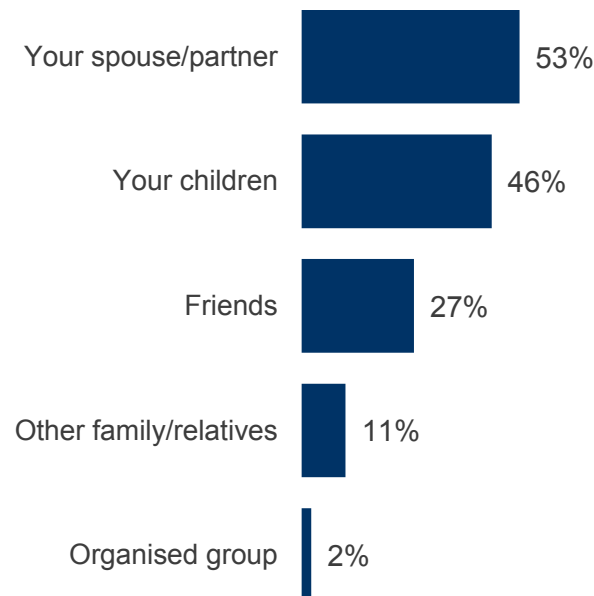
No. of people on the cycling experience (incl. self)

- Overall, 64% of participants/spectators engaged in the cycling experience with at least two others (i.e. three or more people), highlighting the social aspect of the activity. Those who went to regional destinations (n=30) were significantly more likely to be accompanied by one other (43%) compared to metro destinations (n=56) (21%).



Companion type

- More than one in two participants and spectators were accompanied by their spouse/partner.
- Organised groups comprised a very small proportion of companion types.



Q13. How many people accompanied you on this trip (do not include yourself)?

*Note average assumes a maximum of 6.

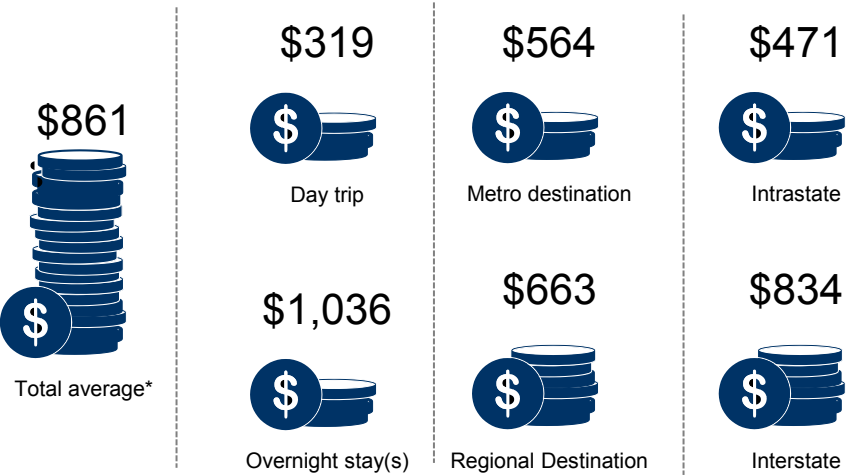
Q14. Who were the individuals that accompanied you?

Base: Recent participants (n=369)

Most recent cycling experience - expenditure

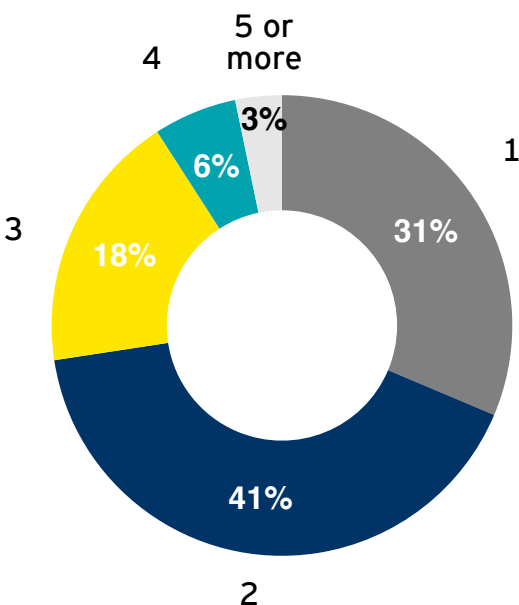
Expenditure

- The figures below shows the trimmed average* spend for the holiday, short break or day trip that included a cycling experience. There was little significant difference in expenditure between metro and regional destinations, however considerably more was spent on overnight and interstate trips compared to day or intrastate trips (unsurprisingly).



Expenditure coverage

- Expenditure covered predominantly one or two people (72%).



Q15a. approximately how much in **total** did you spend on things related to this entire trip, which included the cycling experience? Base: Recent participants (n=369)
Q15b. How many people did these expenses cover?
*Trimmed average: Used to reduce potentially skewed results due to outliers. It is computed after removing the highest 5% and lowest 5% of non-missing values

Recent spectator overview

Recent spectators share more similarities than differences with participants. Below are the key differences.

- ▶ Seven in ten spectators were male.
- ▶ In their attitudes towards cycling, recent spectators differ significantly from participants on only one measure. They were more likely to agree that they were not confident cyclists (**48% vs 77%**).
- ▶ **A half (52%)** agree that Victoria is a safe place to cycle, compared with recent participants (72%).
- ▶ Were significantly more likely to take a long break (5 nights or more) once a year or less compared to participants (**59% vs 24%**)
- ▶ Apart from watching a cycling event/race, sightseeing and social connection with friends/family were the main reasons for engaging in a cycling experience

Attitudes to leisure

	Tourist Participant	Tourist Spectators
<i>Base:</i>	369	34
I love outdoor activities in natural environments, such as bushwalking, cycling or fishing	82% ↑	62% ↓
I love fine wine and going to the best restaurants	68% ↑	57% ↓
My idea of a perfect holiday is lying on a beach or by the pool doing nothing	62% ↑	38% ↓
I like to pamper myself with spa treatments or massages	65% ↑	47% ↓
I enjoy thrill seeking and adventure type activities, such as rock climbing	67% ↑	53% ↓

Recent spectators

A day trip which involved travelling 50km or more in total and/or more than four hours away from home



Recent Spectators

1%

Their last holiday, short break or trip that included spectating in a cycling experience

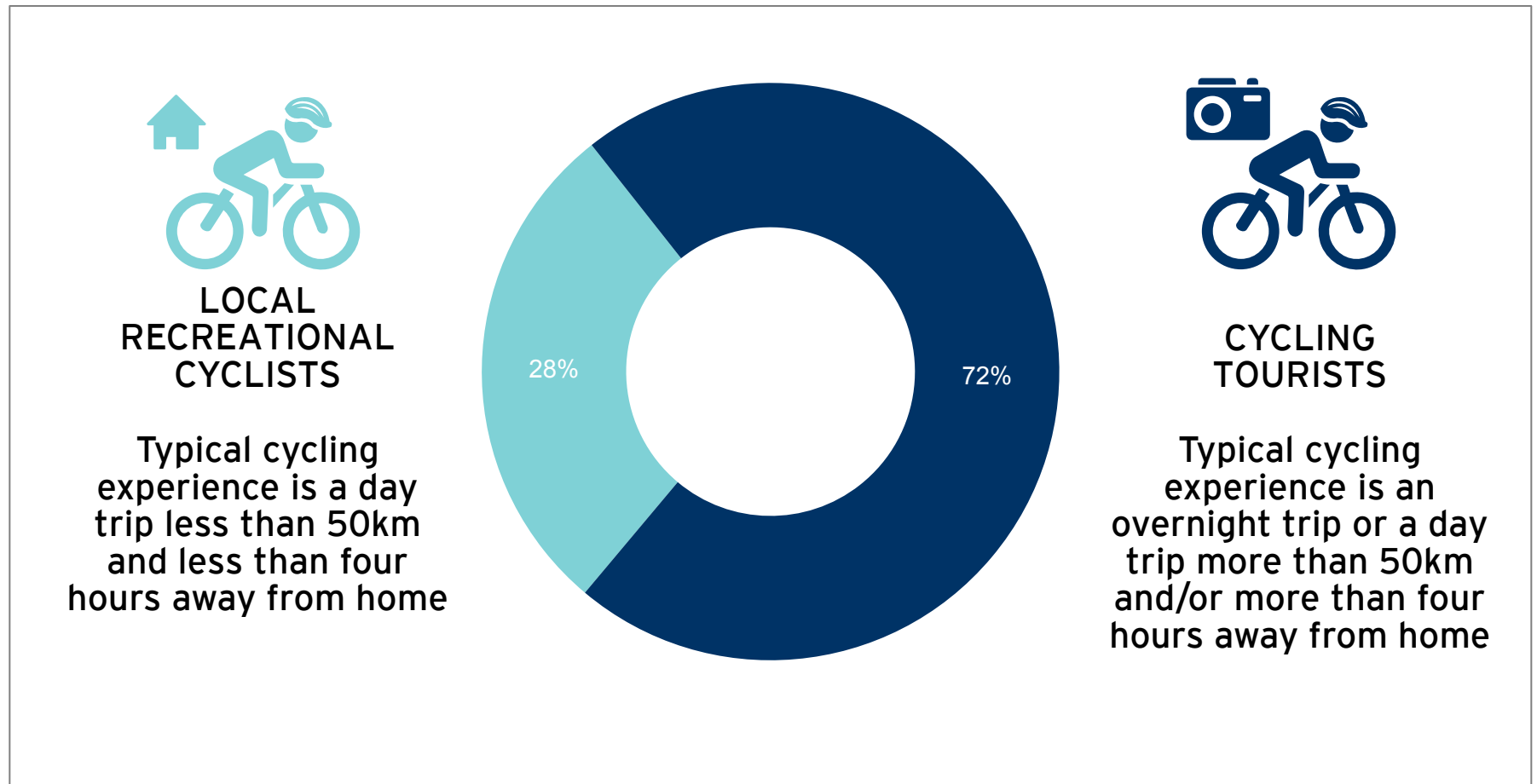
Note: Green arrow indicates significantly higher than the total and red arrow indicates significantly lower than the total

Recent local cyclists and participants



Cycling tourism vs. local recreational cycling

- ▶ Although 14% of our sample reported they had engaged in cycling tourism, according to our definitions, a quarter of these individuals had really only engaged in local recreational cycling.

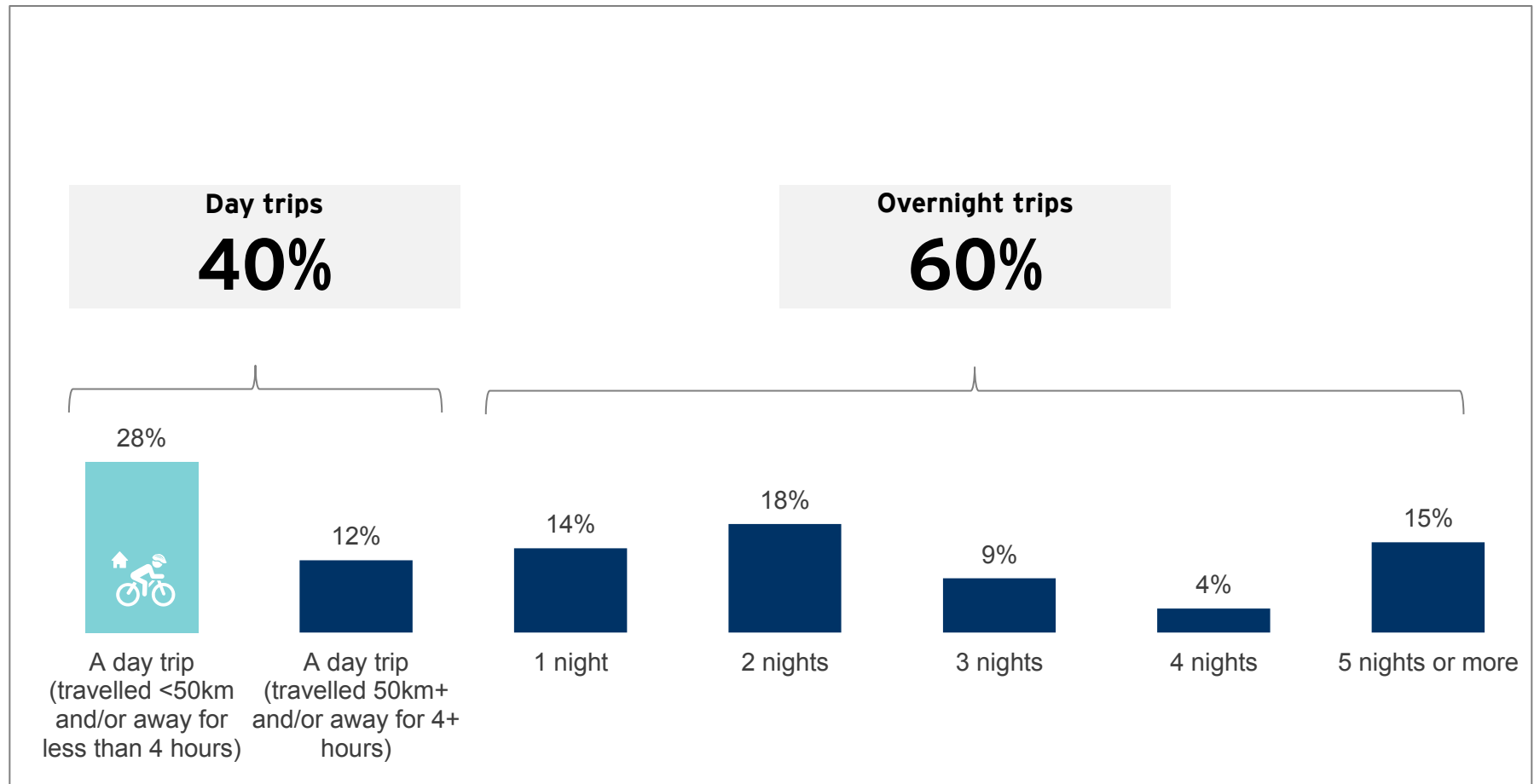


Q6. How long was your holiday, short break or day trip that included the cycling experience?

Base: Participants and Spectators (n=562)

Further breakdown of tourism vs. local recreational cycling

- Although 28% of all participants and spectators were Local Recreational Cyclers, we found that 40% of the most recent cycling trips were day trips. Of the remaining 60% which were overnight trips, breaks of a duration of 2 nights were most common.



Q6. How long was your holiday, short break or day trip that included the cycling experience?

Base: Participants and Spectators (n=562)

Recent local cyclists overview

Local cyclists show a strong interest in cycling as a sport or past time:

- ▶ **Two thirds (64%)** of local cyclists were male while over half were **18-34** years old (**56%**).
- ▶ They represent a market with household income with over half (**53%**) earning **\$78,000** or higher per year.
- ▶ **Seven in ten** consider themselves to be confident cyclists.
- ▶ **Eight in ten (78%)** said it's important to have a wide range of activities and experiences available on holiday.
- ▶ **96%** would consider a holiday in the next five years that included a cycling experience.
- ▶ For many, **cycling is a passion or hobby** with more local cyclists owning a bike than recent participants.
- ▶ In terms of their attitudes towards life and leisure, they lie somewhere in between tourists who lie on a beach and do nothing and thrill seekers. The relaxation combined with activity that cycling offers on a holiday is well suited to local cyclists.

Recent local cyclist

A day trip which involved travelling less than 50km in total AND away for less than four hours away from home



4%

Their last holiday, short break or trip that included a cycling experience (participated/spectated)

Comparison of cycling related activities

- Local cyclists showed a strong interest in cycling as a sport or past time. A third said they enjoy watching it on television and one in five ride regularly to work. Of those who look for rides/events through online cycling communities or belong to a cycling club or association, over half (55%) race competitively (significantly higher than recent participants - 38%).

Cycling related activities				
	Recent participant	Recent Spectators	Local Cyclists	Total
Base:	369	34	155	558
I used to cycle when I was younger, but don't anymore	20%	25%	20%	20%
I enjoy watching cycling on television	30%	38%	33%	32%
I'm a confident cyclist	40%	28%	44%	40%
Cycling is one of my favourite sports or past times	35%	31%	35%	35%
I support my family/friends when they participate in cycling events	29%	34%	30%	30%
I cycle to work regularly	22%	15%	18%	21%
I look out for rides/events through online cycling communities	14%	18%	18%	15%
I belong to a cycling club or association (can be online)	15%	13%	14%	14%
None of these	5%	6%	10%	7%
Total	100%	100%	100%	100%

Cycling club/association or online cycle community activities				
	Recent participant	Recent Spectators*	Local Cyclists	Total
Base:	104	8	45	157
Competitive racing	38%↓	30%↓	55%↑	43%
Social racing	54%	55%	47%	52%
Club rides	49%	51%	52%	50%
Travel to large events (e.g. Tour Down Under)	49%↑	54%↑	26%↓	42%
Training courses/camps	30%	0%	41%	32%
Trail maintenance/development	29%	34%	35%	31%
Support others at events	34%	75%	39%	38%
Club social events	18%	45%	16%	19%
Total	100%	100%	100%	100%

Q38. Which of the following applies to you?

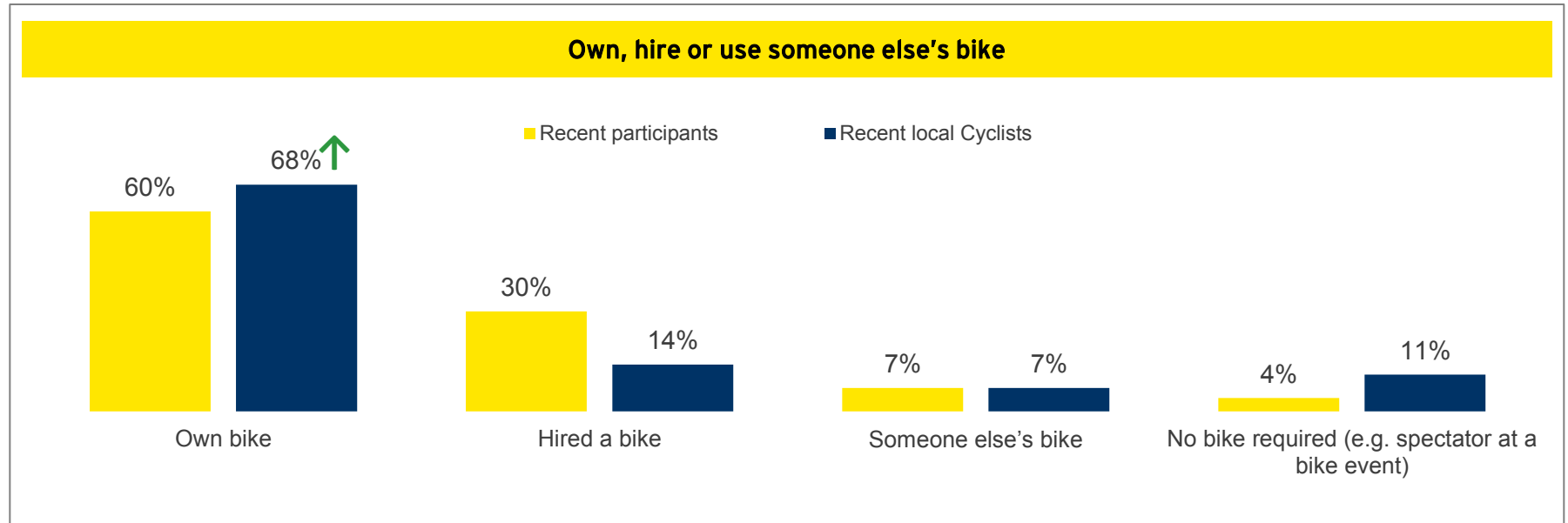
Q39. Which of the following activities do you participate in with your cycling club/association or online cycle community?

*Note: Caution – low sample size

Note: **Green** arrow indicates significantly higher than the total and **red** arrow indicates significantly lower than the total

Bicycle type for most recent cycling experience

- A significantly higher proportion of local cyclists own their bike (68%) compared to recent participants (60%) with over half owning a road bike and/or mountain bike. Three in ten recent participants had hired a bike on their last cycling trip. This suggests that the provision of bike hire options at destinations plays an important role in engagement for many.




Q8. Did you use your own bike, hire a bike or use someone else's bike?

Base: Recent local cyclists (n=155)

Note: **Green** arrow indicates significantly higher than the total and **red** arrow indicates significantly lower than the total

Role of the cycling experience in local day trip – Local cyclists

- Participation in the cycling experience was the main reason for going on the holiday, short break or day trip and also the choice of destination for half (49%) of local cyclists. Local cyclists by definition travelled less than four hours away or less than 50 km from where they live, which suggests that some may have considered sightseeing or some of the benefits of the cycling such as fitness as the main reason for the cycling experience rather than the act of cycling itself.

	 Recent local cyclists
Cycling the main reason to go on the trip	56% ↑
Cycling the main reason to go to the destination	54% ↑
Cycling was not the main reason for the experience	40% ↓

Q11a. And when it came to the reason for the holiday, short break or day trip, the **cycling experience** was...

Base: Recent local cyclists (n=155)

Q11b. Which of the following best describes why you visited [**LOCATION – Q5**]?

Note: **Green** arrow indicates significantly higher than the total and **red** arrow indicates significantly lower than the total

Role of cycling (local daytrip) - Recent local cyclists

- Participation in the cycling experience was the main reason for going on the holiday, short break or day trip and also the choice of destination was higher for local cyclists travelling to metro areas compared to regional destinations. Although this result is indicative only due to the small base size, it is worth noting that this difference between metro and regional is similar for recent participants.

Recent local cyclists (n=155)	Destination	
	Metro (n=115)	Regional (n=28*)
Main reason to go on this trip was to participate in cycling experience	68%	37%*
Main reason to go to this destination was to participate in cycling experience	67%	30%*
Cycling experience was the main reason for the trip and the main reason for the choice of destination	61%	30%*

Q11a. And when it came to the reason for the holiday, short break or day trip, the **cycling experience** was...

Base: Recent local cyclists (n=155)

Q11b. Which of the following best describes why you visited [LOCATION – Q5]?

*Note: Caution: Small base sizes

Key differences between recent local cyclists and participants

Interestingly, the similarities between these two key groups far outweigh the differences. Below are where they do differ.

- ▶ In terms of **their attitudes towards life and leisure**, local cyclists differ significantly on a number of fronts. Local cyclists were somewhere in between tourists who lie on a beach and do nothing and thrill seekers. **The balance of relaxation combined with an activity like cycling is well suited to local cyclists.** They were more introverted than recent participants and less likely to look for new experiences every day.
- ▶ **Ideas that appeal to local cyclists more than recent participants were operators or travel agents who can pre-book accommodation, tickets, transfers and bike hire (37%), bicycle storage on trains and at train stations and buses with racks.** This suggests that the convenience of organising a cycling experience is more important to local cyclists and they may have more propensity to use public transport for trips involving a cycling experience (as we know they were more likely to own their bike compared to recent participants). A lack of experience in cycling tourism could also play a role in these results.
- ▶ **Although both groups consist of younger people (18-34),** local cyclists were significantly less likely to have children at home (47% vs 59%).
- ▶ Of those that would consider a cycling experience, local cyclists were significantly more likely to consider Melbourne as their destination **(26% vs 19%).**





Market potential

The Australian cycling tourism market is a blank canvas in the minds of consumers.

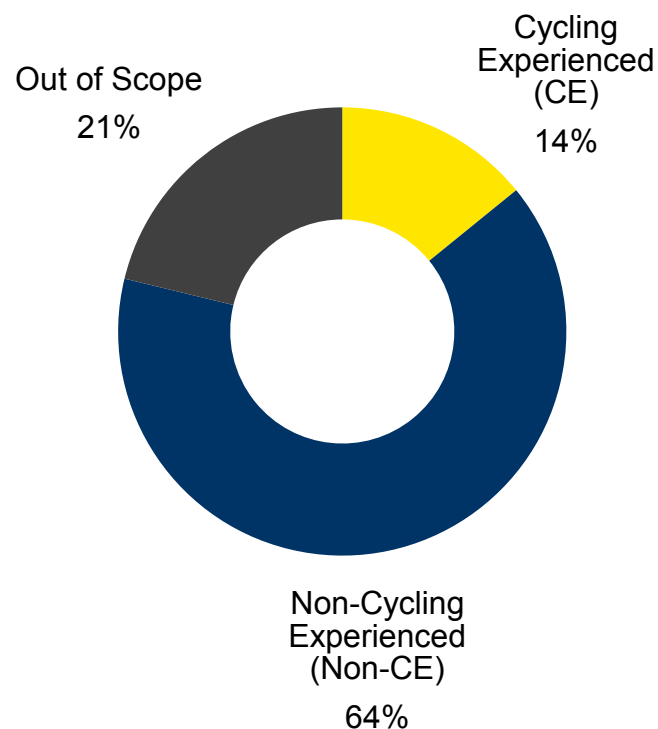


Another view of the market

Who is the potential market?

To better analyse the potential of the cycling tourism market, this section (and some parts of the remainder of this report) has reclassified the original market breakdown into three groups...

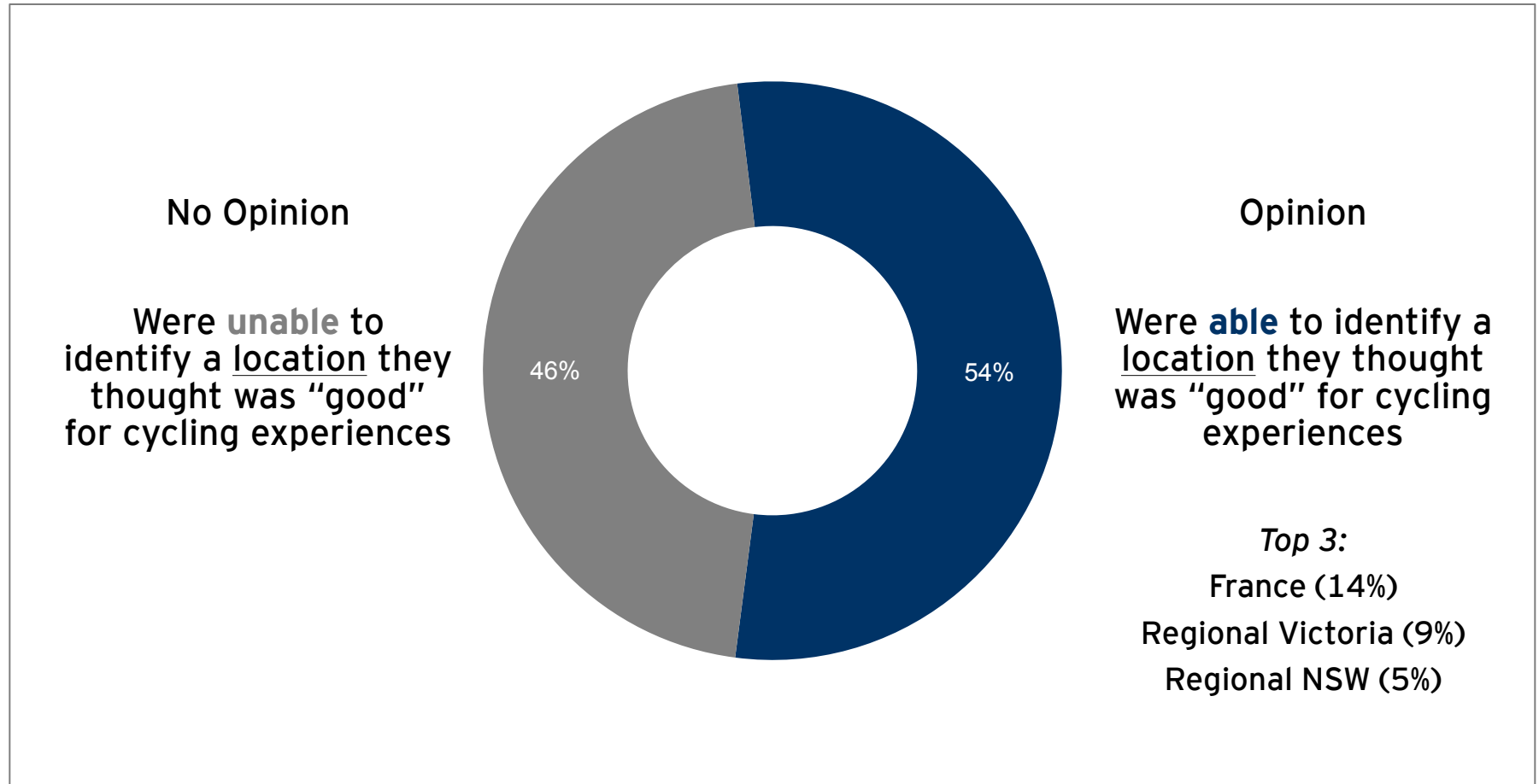
- ▶ **Cycling Experienced (14%):** Any participants, spectators, or those who have participated and spectated a cycling experience as part of a holiday, short break, or day trip in the last two years. These individuals represent the most engaged in the category and thus the most likely to grow and drive the market.
- ▶ **Non-Cycling Experienced (64%):** Any non-cycler, thus anyone who has travelled in the last two years but not taken part in a cycling experience, whether as a participant or a spectator. This group represents the true source of potential for market growth and new entrants.
- ▶ **Out of Scope (21%):** Any non-traveller, i.e. anyone who has not taken a holiday, short break, or day trip in the last two years. This group is considered the least likely to contribute to growing cycling tourism.



Attitudes towards cycling destinations

Best cycling destination overall - unprompted

- We asked respondents if they could name any destination that would be good for cycling experiences. Almost half of all respondents could not identify any location.












Q17. When you think of destinations (anywhere) that are good for cycling experiences, which ones come to mind?

Base: Total sample (n=2,000)

Best cycling destinations - unprompted

- When it came to common destinations that came to mind for good cycling experiences, the top destination was France which for some, was marked by the 'Tour de France' (14%). When it came to regional areas, regional Victoria (9%) was thought to be a good destination for cycling followed by regional NSW (5%). In saying that, 46% didn't know of any destinations or did not offer an opinion which suggests that no destination truly owns this category.

	Overall	CE	Non CE	Participated in this location in last 2 years
France	 14%	9%	19%	na
Regional VIC	 9%	13%	10%	37%
Regional NSW	 5%	5%	5%	23%
Other Europe	 5%	5%	5%	na
Adelaide	 4%	4%	5%	11%
Sydney	 4%	8%	3%	11%
Melbourne	 3%	6%	3%	11%
Other (2% and lower)	 25%	32%	26%	na
None/Don't know	 46%	37%	41%	na



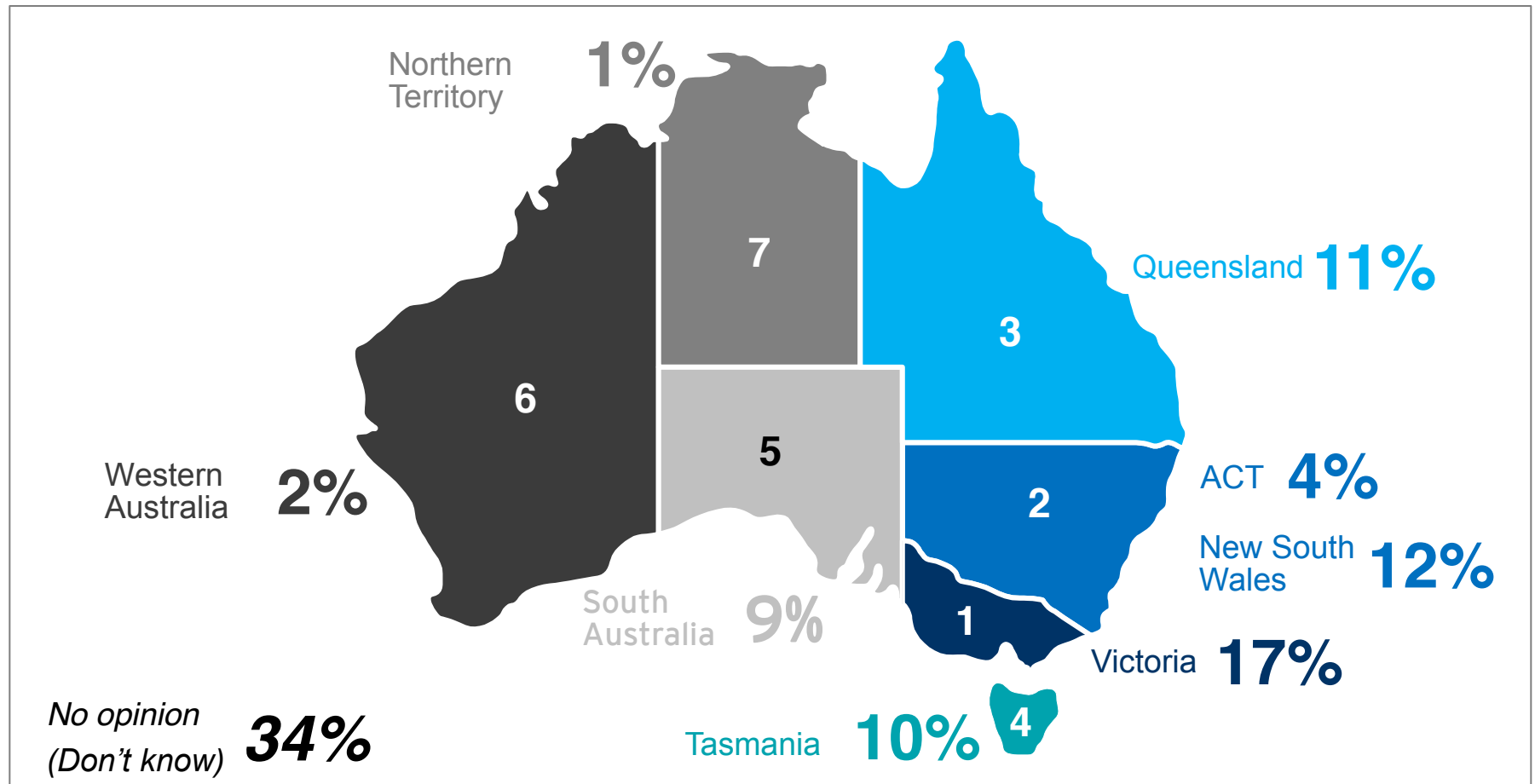
Regional SA, TAS, ACT, Asia, Netherlands, regional QLD, NZ, rail trails, bush, local parks...

Q17. When you think of destinations (anywhere) that are good for cycling experiences, which ones come to mind?

Base: Total sample (n=2,000)

Best cycling destination state - prompted

- Amongst those who could make a judgement, Victoria was the number one ranked state by those surveyed (17%) for cycling experiences as part of a getaway, followed by New South Wales (12%) and Queensland (11%).



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)

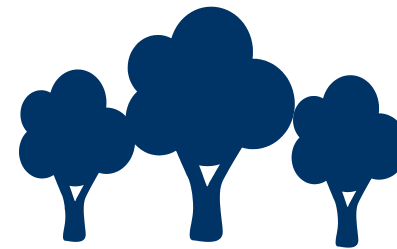
Which state is best for...?

- To better understand existing attitudes to cycling tourism, we asked respondents to rate Australian states on the basis of four dimensions of cycling tourism...

Cycling tourism facilities and accommodation



Natural scenery



Variety of choice of cycling tours and options



Quality of cycling tracks and trails

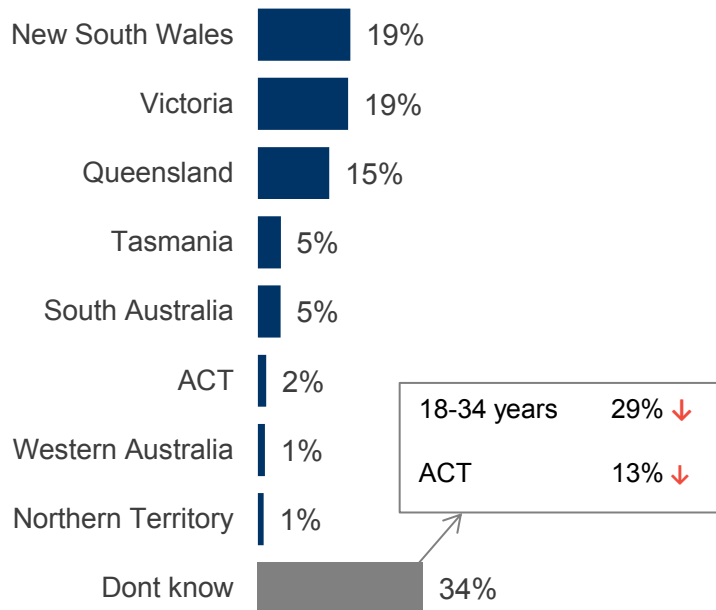


Q20. Which state or territory do you think is best when it comes to...?

Which state is best for...?

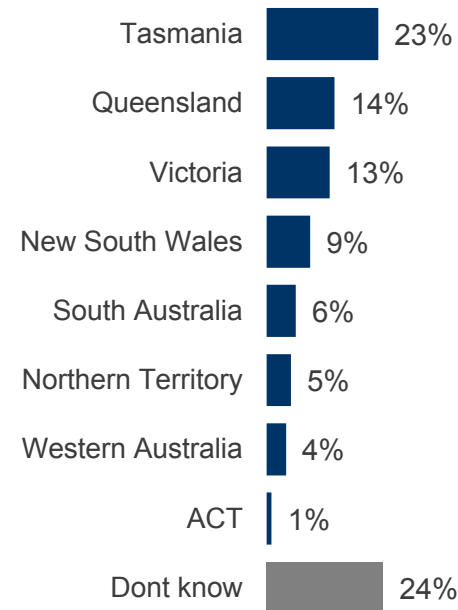
Cycling tourism facilities and accommodation

- Out of all of the states within Australia, NSW and Victoria were the two top states when it came to cycling tourism facilities and accommodation (both 19%).
- A third (34%) had no opinion.



Natural scenery

- Tasmania came out ahead of the others as the state with the best natural scenery, as seen by a quarter (23%) of respondents. Queensland (14%) and Victoria (13%) followed, while a quarter (24%) had no opinion.



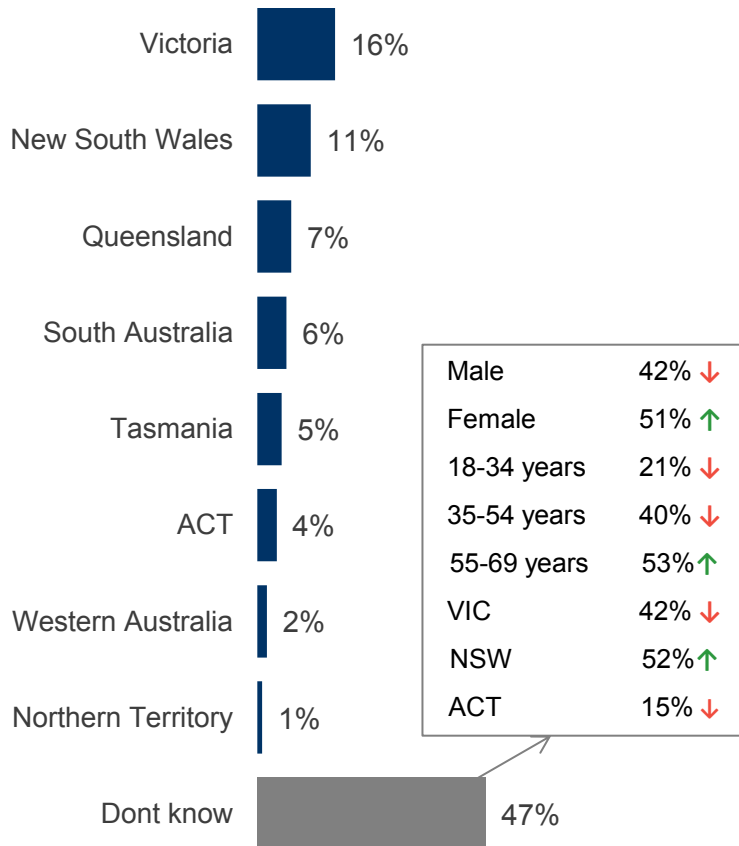
Note: **Green** arrow indicates significantly higher than the total and **red** arrow indicates significantly lower than the total

Base: Total sample (n=2,000)

Q20. Which state or territory do you think is best when it comes to...?

Which state is best for...?

Quality of cycling tracks and trails



- ▶ There was the same theme of a general lack of awareness in relation to the state or territory that best provided quality cycling tracks and trails (for 47%).
- ▶ However, out of all of the states, Victoria was seen as the one that did this the best (16%).

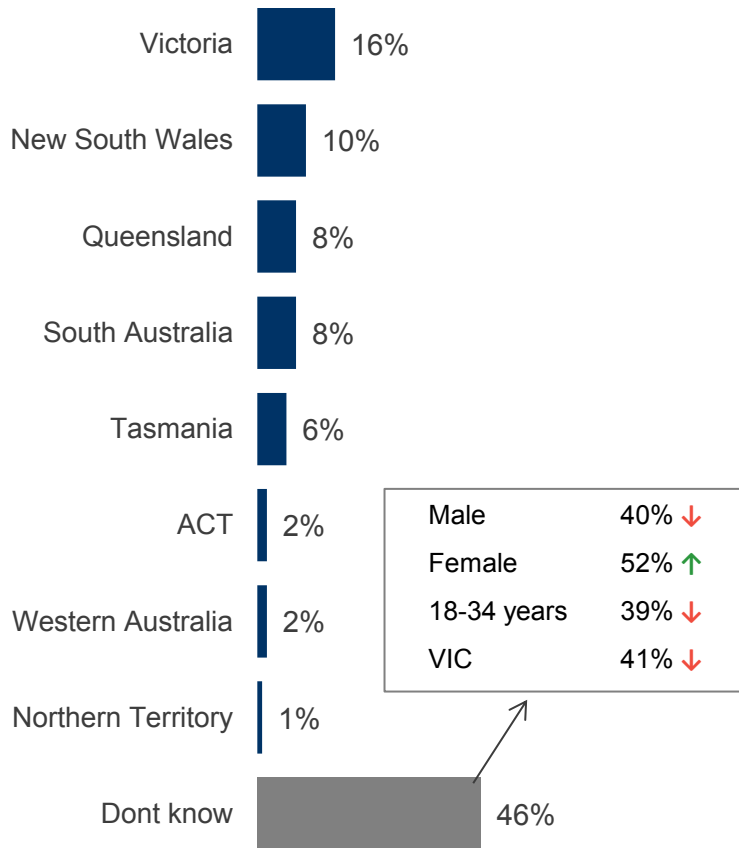
Note: **Green** arrow indicates significantly higher than the total and **red** arrow indicates significantly lower than the total

Base: Total sample (n=2,000)

Q20. Which state or territory do you think is best when it comes to...?

Which state is best for...?

Variety of choice of cycling tours and options



- Awareness appeared to be an issue when it came to cycling tours and options with almost half (46%) who didn't know which state or territory that applied to.
- Of those who did offer an opinion, one in six (16%) considered Victoria as the state with the best variety of choice followed by NSW (10%).

Note: **Green** arrow indicates significantly higher than the total and **red** arrow indicates significantly lower than the total

Base: Total sample (n=2,000)

Q20. Which state or territory do you think is best when it comes to...?

Best state for a cycling experience (by subgroup)

- ▶ Compared to those who travelled interstate in the last two years, intrastate travellers were significantly more likely to think that NSW was the best state or territory for a cycling experience as part of a holiday. On the other hand, a higher proportion of interstate travellers considered Victoria, Western Australia and Northern Territory the best state or territory.
- ▶ Those with previous cycling experience (CE) were significantly more likely than non CE to think that Victoria (24% vs 16%) and Tasmania (23% vs 10%) were the best destinations.

Best state/territory for a cycling experience as part of a holiday, short break or day trip

Location	Origin		Holidays last 2 years		Total (2000)
	Intrastate (352)	Interstate (160)	CE (562)	Non CE (1,090)	
Victoria	22%	28% ↑	24% ↑	16% ↓	17%
New South Wales	29% ↑	15%	8% ↓	12% ↑	12%
Queensland	13%	15%	13%	11%	11%
Tasmania	9%	6%	23% ↑	10% ↓	10%
South Australia	11%	12%	11%	9%	9%
ACT	3%	5%	4%	4%	4%
Western Australia	3%	7% ↑	4% ↑	1% ↓	2%
Northern Territory	0%	5% ↑	2%	1%	1%
Don't know	11% ↓	8% ↓	12% ↓	36% ↑	34%

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?

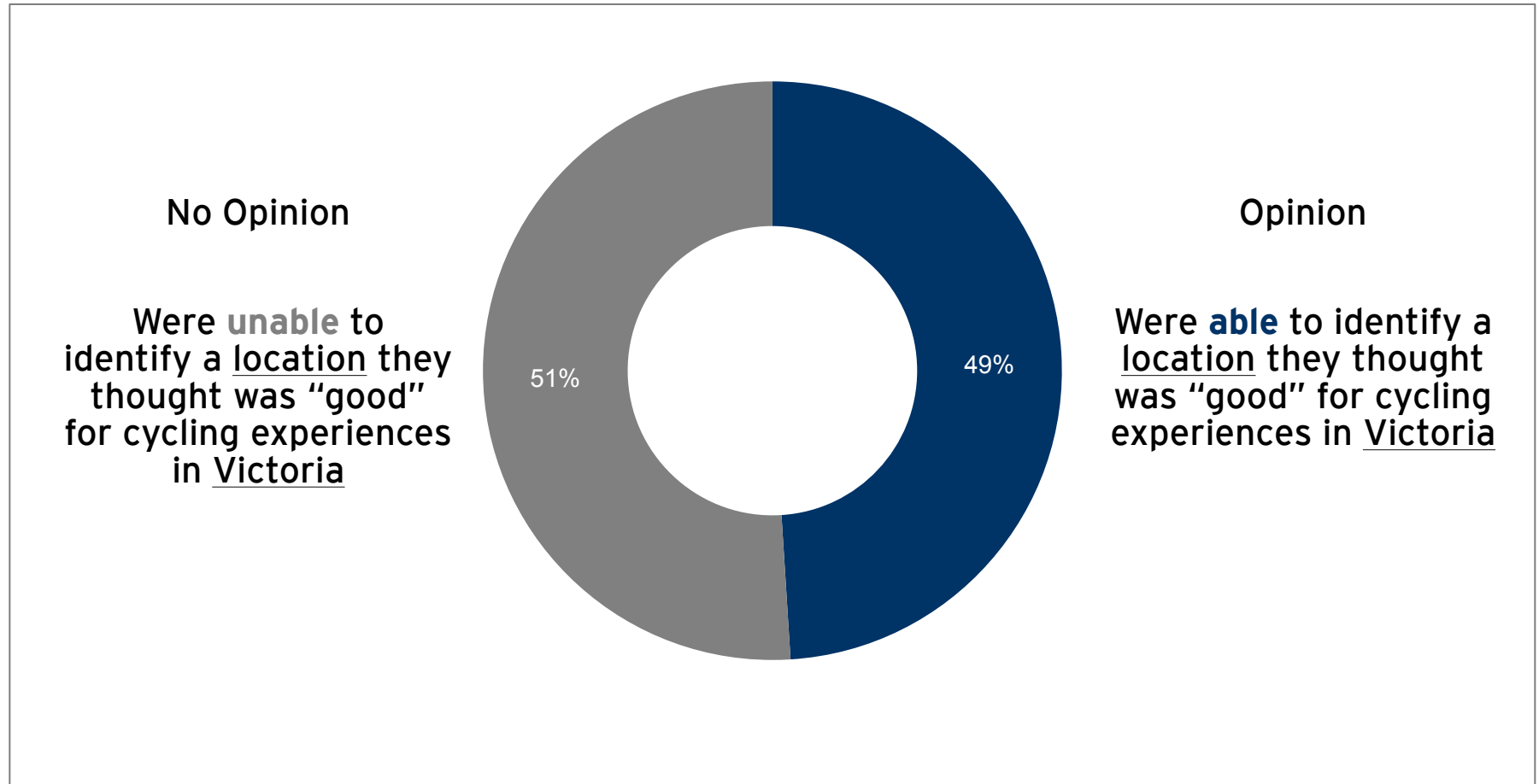
Base: Total sample (n=2,000)

Note: **Green** arrow indicates significantly higher than the total and **red** arrow indicates significantly lower than the total

Attitudes to Victoria as a cycling destination

Best cycling destinations in Victoria - unprompted

- We asked respondents if they could name any destination that would be good for cycling experiences in Victoria. As with the question relating to overall destinations, there were many who could not identify a location.

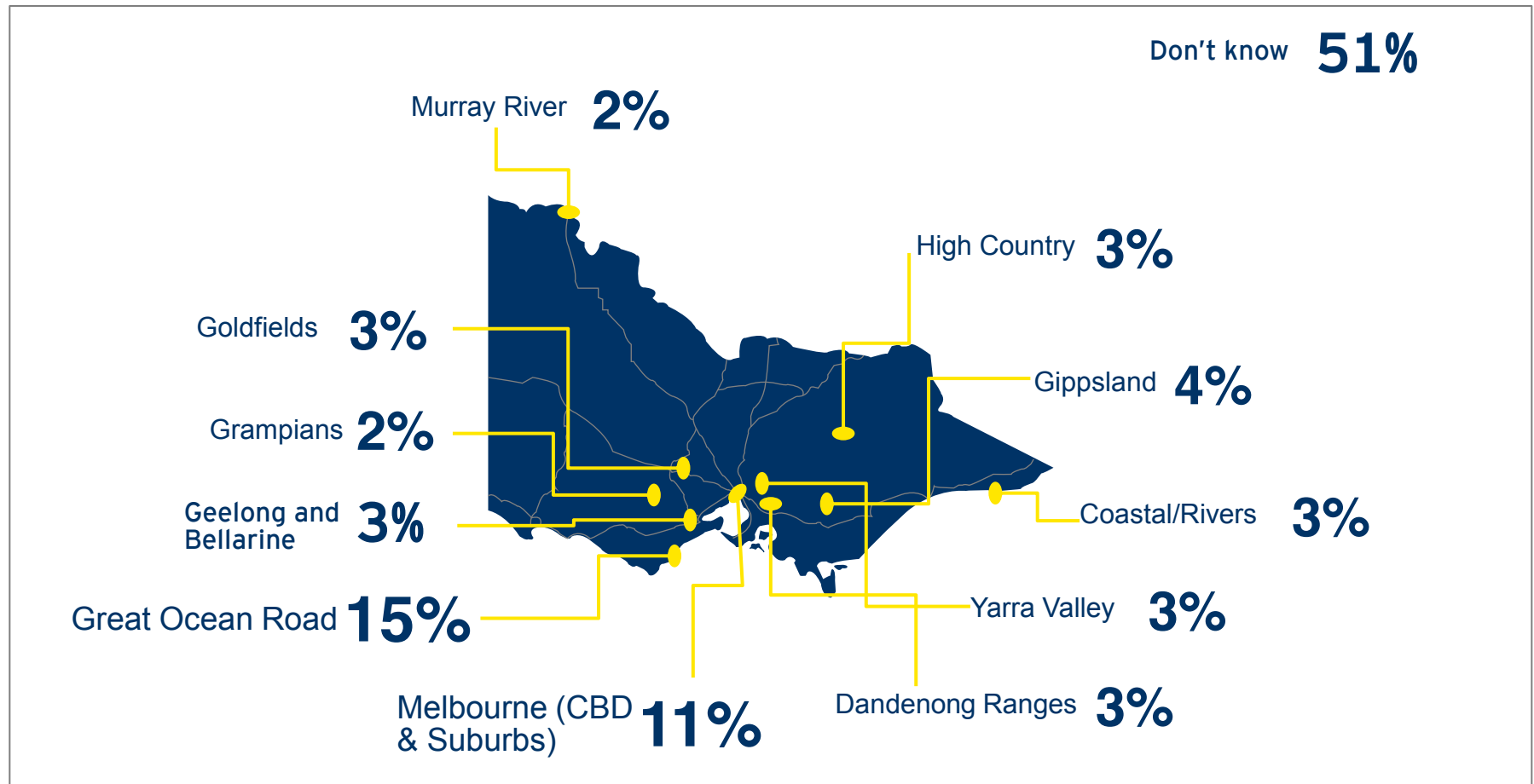


Q29b. What parts of Victoria can you think of which offer good cycling experiences? (OE)

Base: Those who would consider a cycling experience in the next five years (n=1,139)

Best cycling destinations in Victoria - unprompted

- After accounting for those without an opinion, there was one standout destination in Victoria for cycling tourism – the Great Ocean Road. This again highlights the opportunity for showcasing the potential for cycling tourism in other regional destinations.



Q29b. What parts of Victoria can you think of which offer good cycling experiences? (OE)

Base: Those who would consider a cycling experience in the next five years (n=1,139)

Awareness and knowledge of cycling experiences overview

Cycling Destinations

- ▶ It can be said that no state or territory 'owns' cycling tourism.
- ▶ Australia doesn't have a 'France' (a Mecca or promised land for cycling tourism due in no small part to the popularity of the Tour de France), so there is a clear opportunity for Victoria to own this space in the same way that:
 - QLD is known for theme parks/ family holidays / beaches and weather
 - NSW owns beaches/ spectacular harbour views / water
 - VIC has a reputation for food / coffee / arts and culture
- ▶ Education and simplicity is required as a main barrier is the perceived effort involved in engaging in a cycling experience.
- ▶ Awareness and knowledge appears low with one in two (54%) non CE not feeling experienced enough to consider a cycling experience and four in ten (39%) of CE not knowing where to find information about cycling in Victoria.
- ▶ People do not instinctively know how to engage with cycling on a holiday. It is not like going to a beach and hiring a surfboard. There are a lot more factors involved...

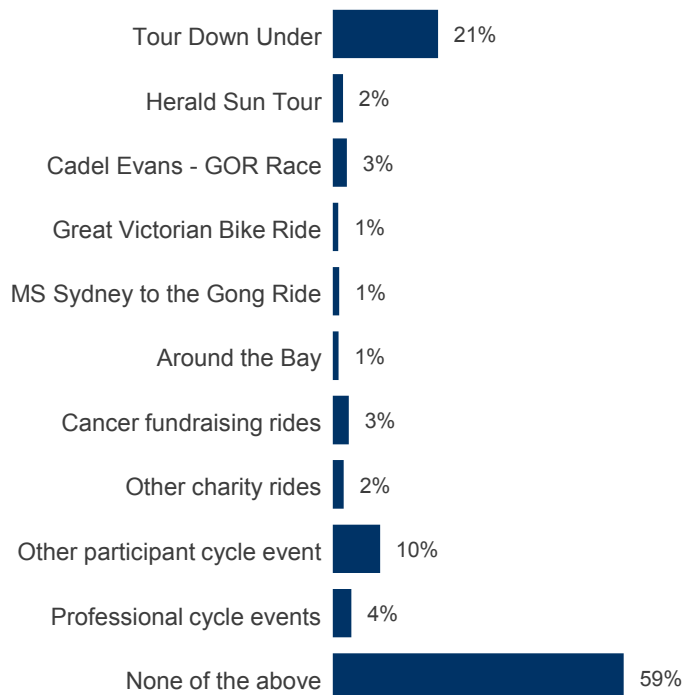


Cycling events

Awareness of cycling events - Unprompted

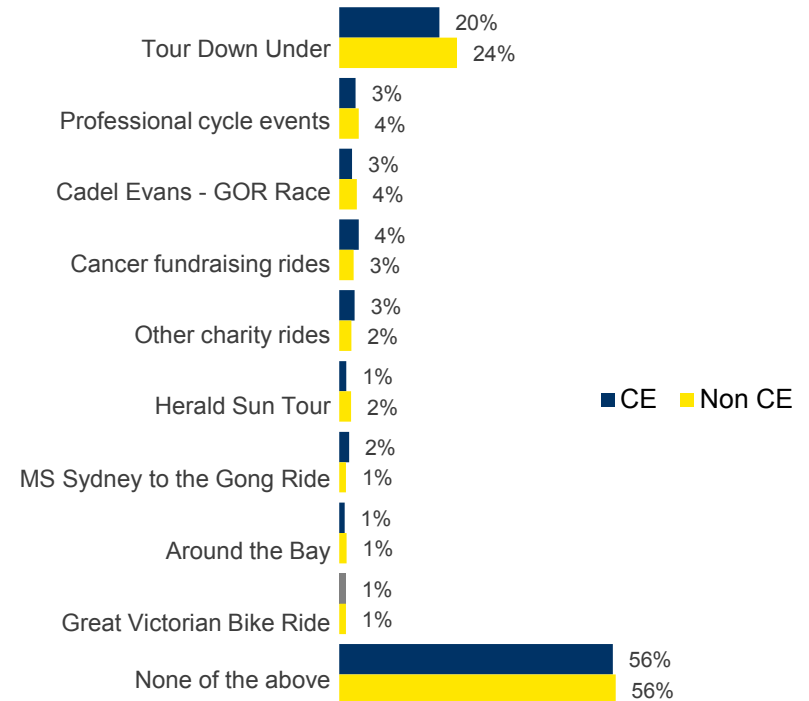
Unprompted awareness - Total sample

- ▶ When it came to cycling events, The Tour Down Under was by far the most well known Australian cycling event with one in five (21%) recalling this event. Six in ten (59%) were not aware of any events.



Unprompted awareness - Cycling Experience vs. non cycling experience

- ▶ Surprisingly, the Tour Down Under was more well known among non CE than those with CE, suggesting that many may engage with cycling by spectating it on TV but not necessarily participating.

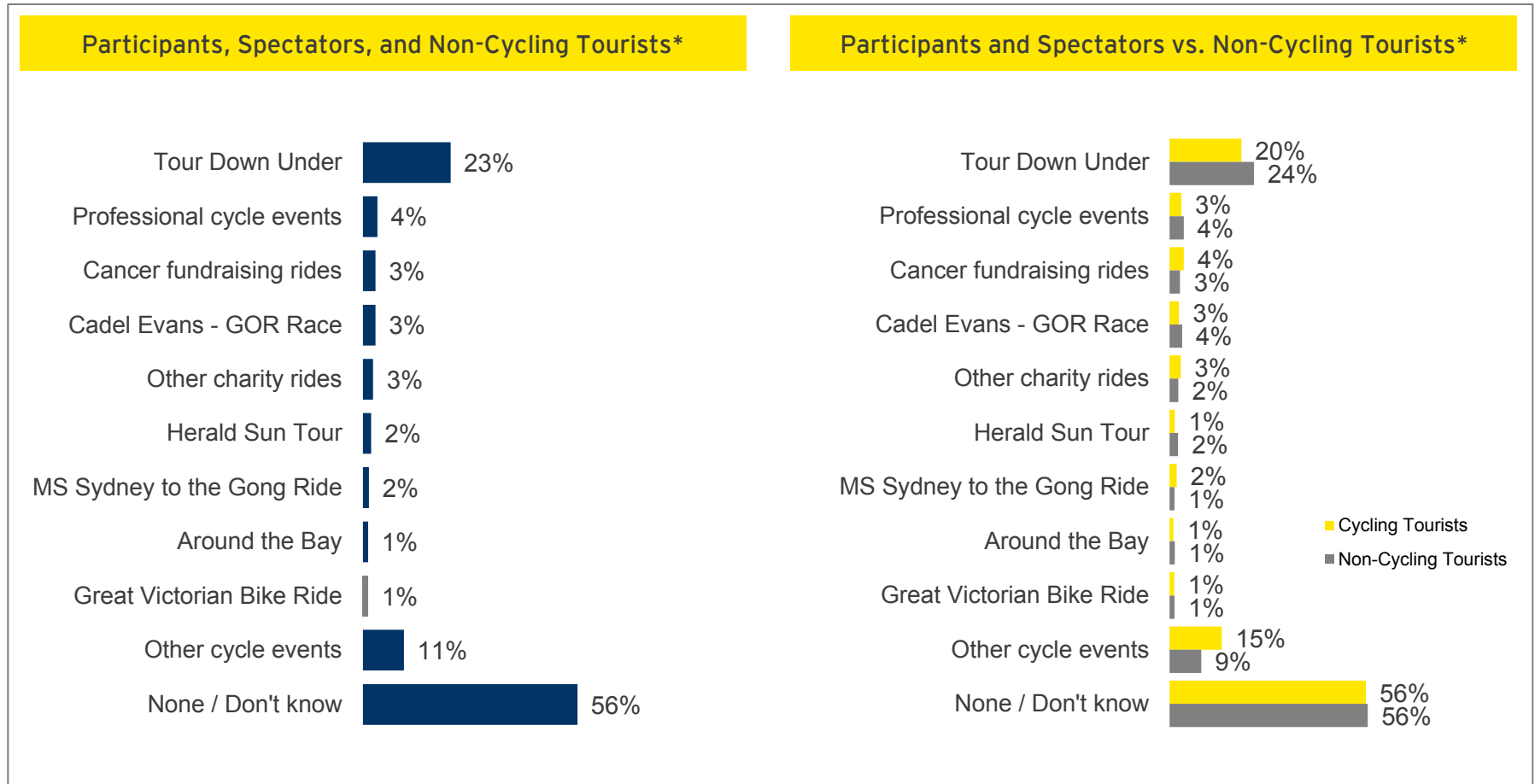


Q33. What Australian cycling events are you aware of? (OE)

Base: Total sample (n=1,139)
CE (n=517), Non CE (n=489)

Awareness of cycling events - Unprompted

- Although there was considerable unprompted awareness for the Tour Down Under, more than half of participants, spectators and non-cycling tourists could not name any cycling events without prompting.



Q33. What Australian cycling events are you aware of? (OE)

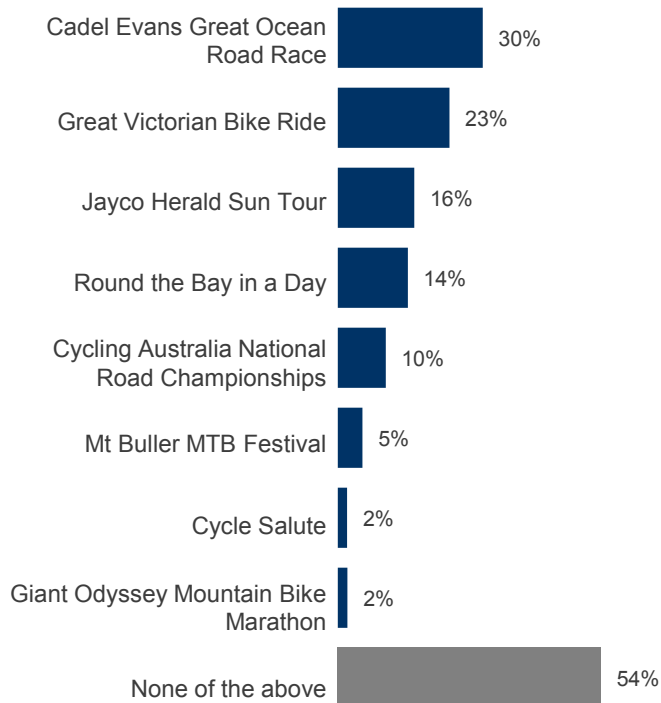
*Note: Excludes non-travellers

Base: Participants, Spectators, and Non-Cycling Tourists (n=1,006), Participants and Spectators (n=517), Non-Cycling Tourists (n=489)

Awareness of Victorian cycling events - Prompted

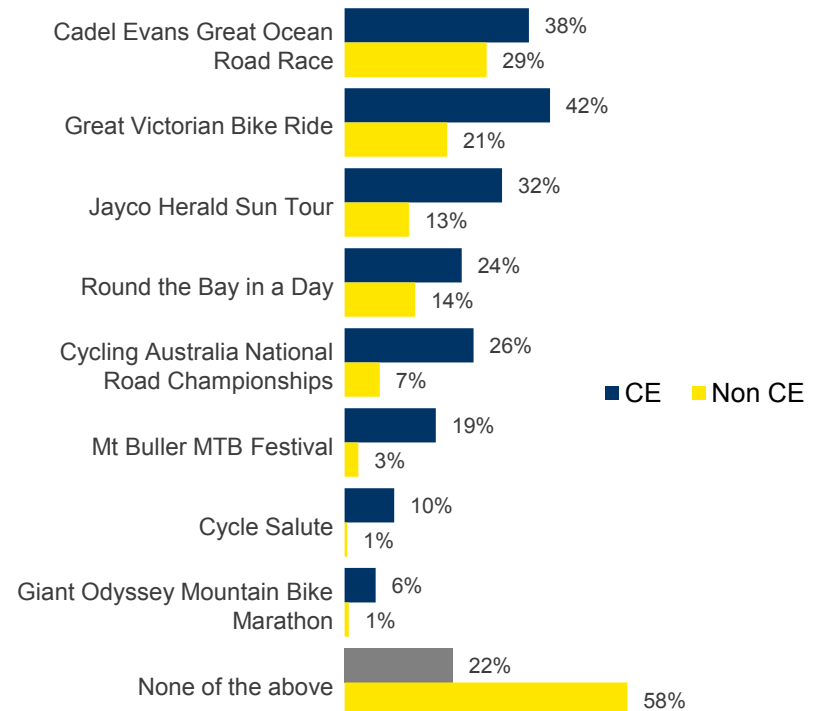
Prompted awareness - Total sample

- When prompted, the Cadel Evans Great Ocean Road Race was the most recalled event with around one in three naming this event (30%). This was potentially influenced by the timing of the survey coinciding with the Race.



Prompted awareness - Cycling Experience vs. non cycling experience (n=1,652)

- Among those with previous cycling experience, The Great Victorian Bike Ride was the most well known Victorian cycling event (42%).

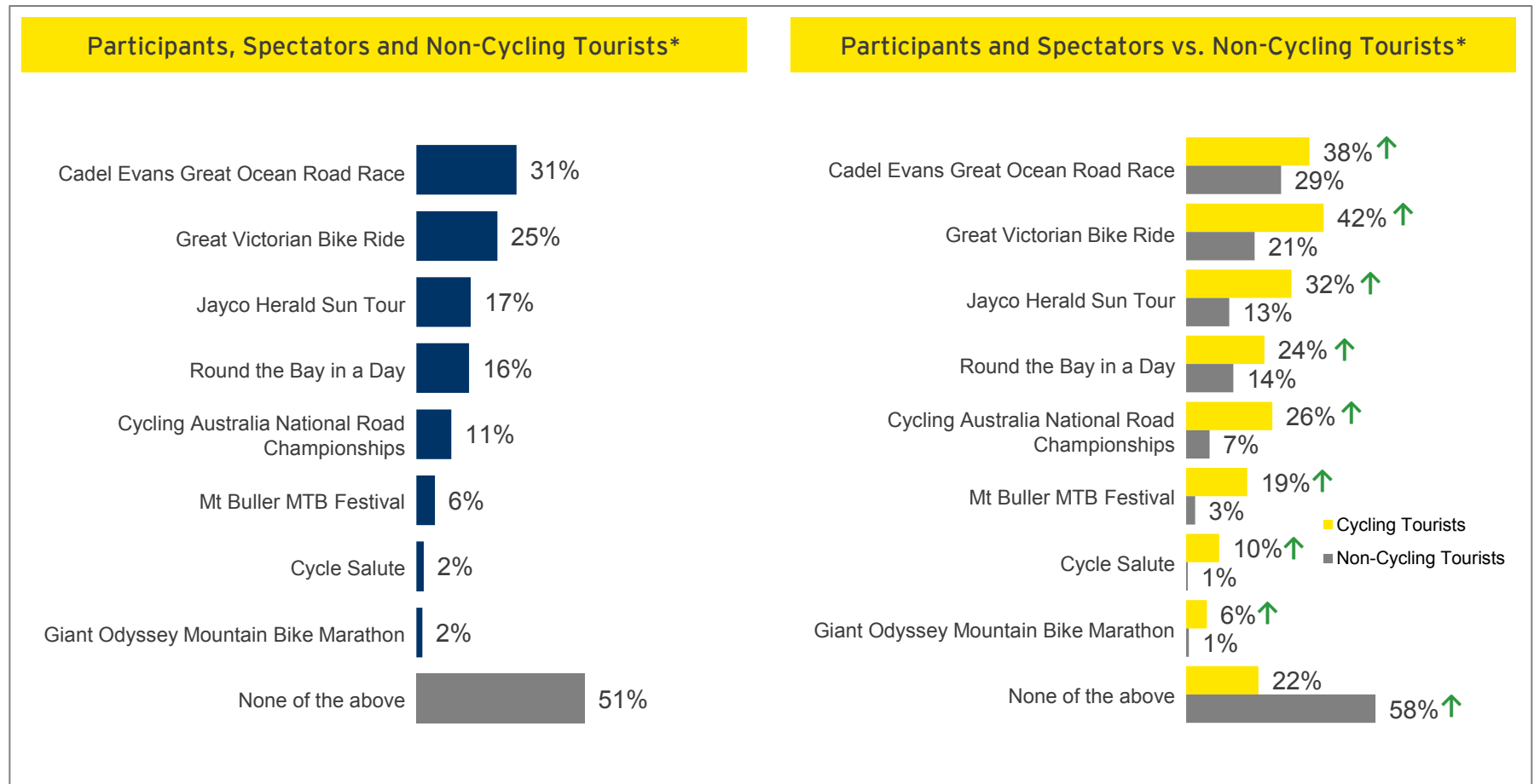


Q31. Have you heard of any of the following Victorian cycling events?

Base: Total Sample (n=2,000)
CE (n=562), Non CE (n=1,090)

Awareness of Victorian cycling events - Prompted

- When prompted with Victorian events, a lack of awareness was evident amongst half of those who have travelled in the last 2 years. Participants and Spectators were more often aware of events, highlighting their significant engagement in cycling.



Q31. Have you heard of any of the following Victorian cycling events?

Note: Green arrow indicates significantly higher than the total and red arrow indicates significantly lower than the total

*Note: Excludes non-travellers

Base: Participants and Spectators and Non-Cycling Tourists (n=1,652), Participants and Spectators (n=562), Non-Cycling Tourists (n=1,090)

Awareness of Victorian cycling events - Prompted

- Unsurprisingly, those living in Victoria were significantly more likely to be aware of the Victorian cycling events. However, even among Victorians, the Mt Buller MTB Festival, Cycle Salute and the Giant Odyssey Mountain Bike Marathon had a relatively low level of latent awareness.

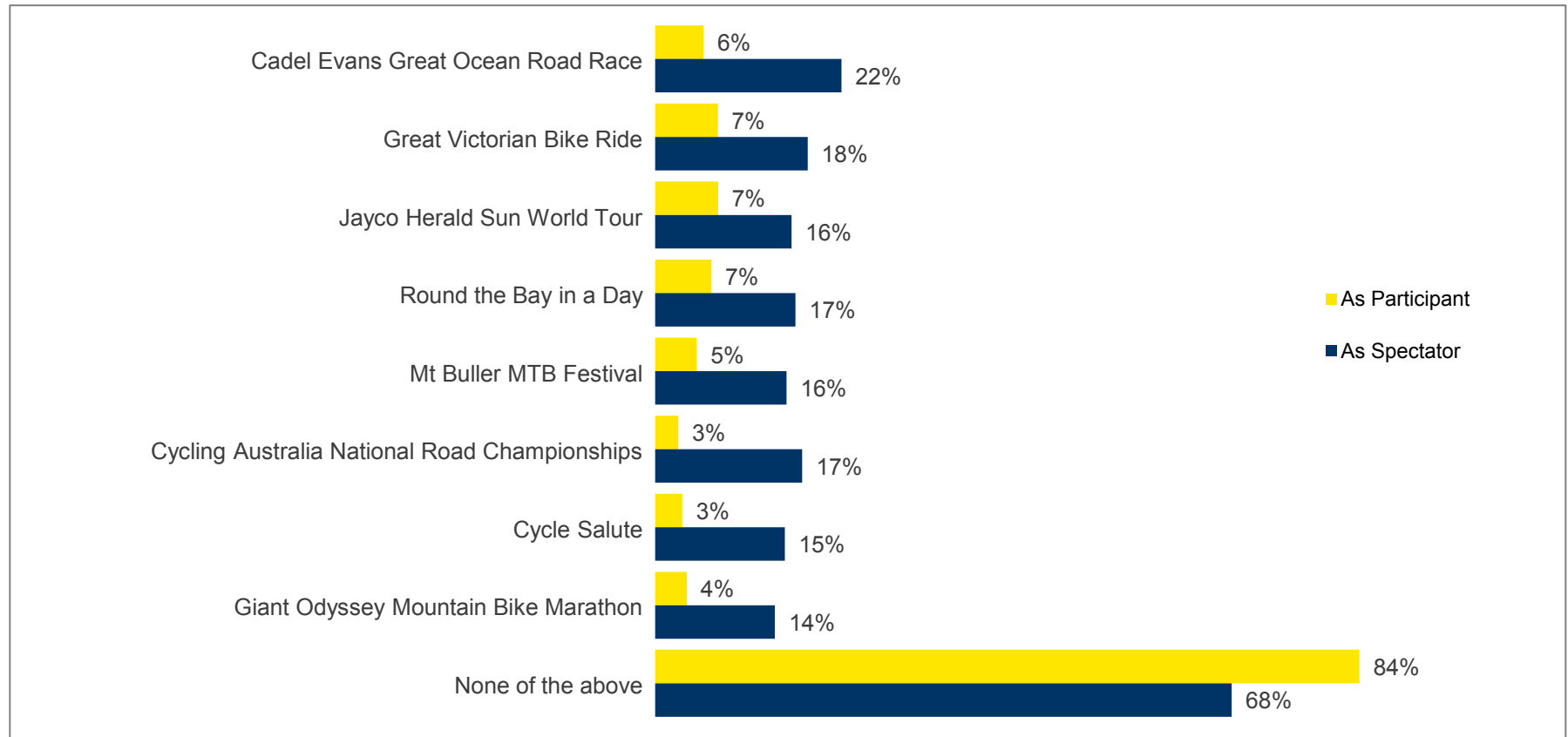
	Origin				
	Vic	NSW	QLD	SA	Total non Victoria
<i>Base:</i>	575	757	460	173	1425
Cadel Evans Great Ocean Road Race	44%↑	22%↓	23%↓	24%	24%↓
Great Victorian Bike Ride	49%↑	11%↓	12%↓	10%↓	12%↓
Jayco Herald Sun Tour	31%↑	10%↓	8%↓	11%	9%↓
Round the Bay in a Day	35%↑	6%↓	5%↓	6%↓	6%↓
Cycling Australia National Road Championships	12%	9%	9%	8%	9%
Mt Buller MTB Festival	7%	4%	4%	4%	4%↓
Cycle Salute	3%	2%	1%	2%	2%
Giant Odyssey Mountain Bike Marathon	3%	1%	2%	1%	1%↓
None of the above	29%↓	65%↑	66%↑	60%	64%↑

Note: **Green** text indicates significantly higher than the total and **red** text indicates significantly lower than the total
Q31. Have you heard of any of the following Victorian cycling events?

Base: Total Sample (n=2,000)

Events considered as participant or spectator

- Overall, less than one in ten would consider participating in any of the Victorian cycling events named which signifies some level of disconnect that some respondents have towards participating in these events. By far though, there was an overall preference towards spectating rather than participating with The Cadel Evans Great Ocean Road Race, the Great Victorian Bike Ride and the Jayco Herald Sun World Tour the most popular for viewing in person.



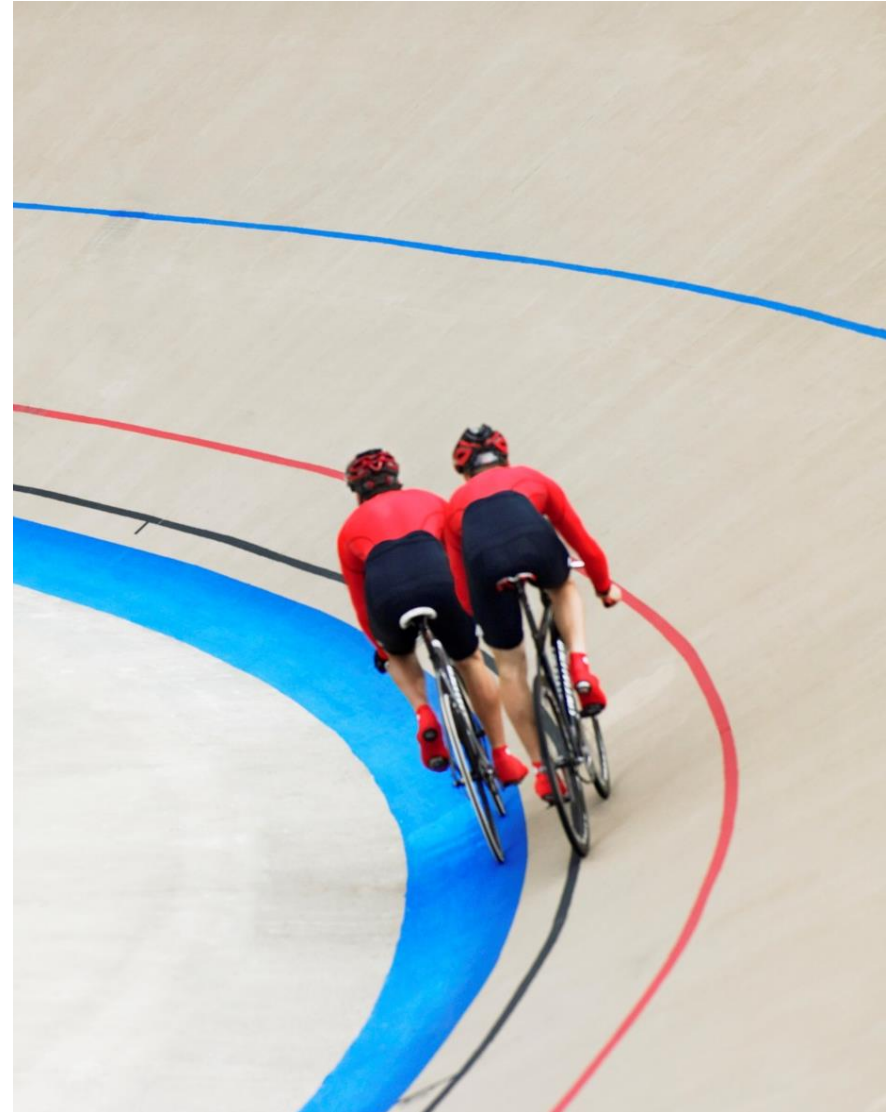
Q32. Would you consider visiting any of these events as a participant or spectator?

Base: Total Sample (n=2,000)

Awareness and knowledge of cycling experiences overview

Cycling events

- ▶ The Tour Down Under is by far the most well known Australian cycling event with one in five (21%) awareness. Six in ten (59%) were not aware of any events.
- ▶ Awareness of Victorian cycling events is highest for the Cadel Evans Great Ocean Road Race. However, the results were potentially influenced by the timing of the survey coinciding with the inaugural race in early 2015.

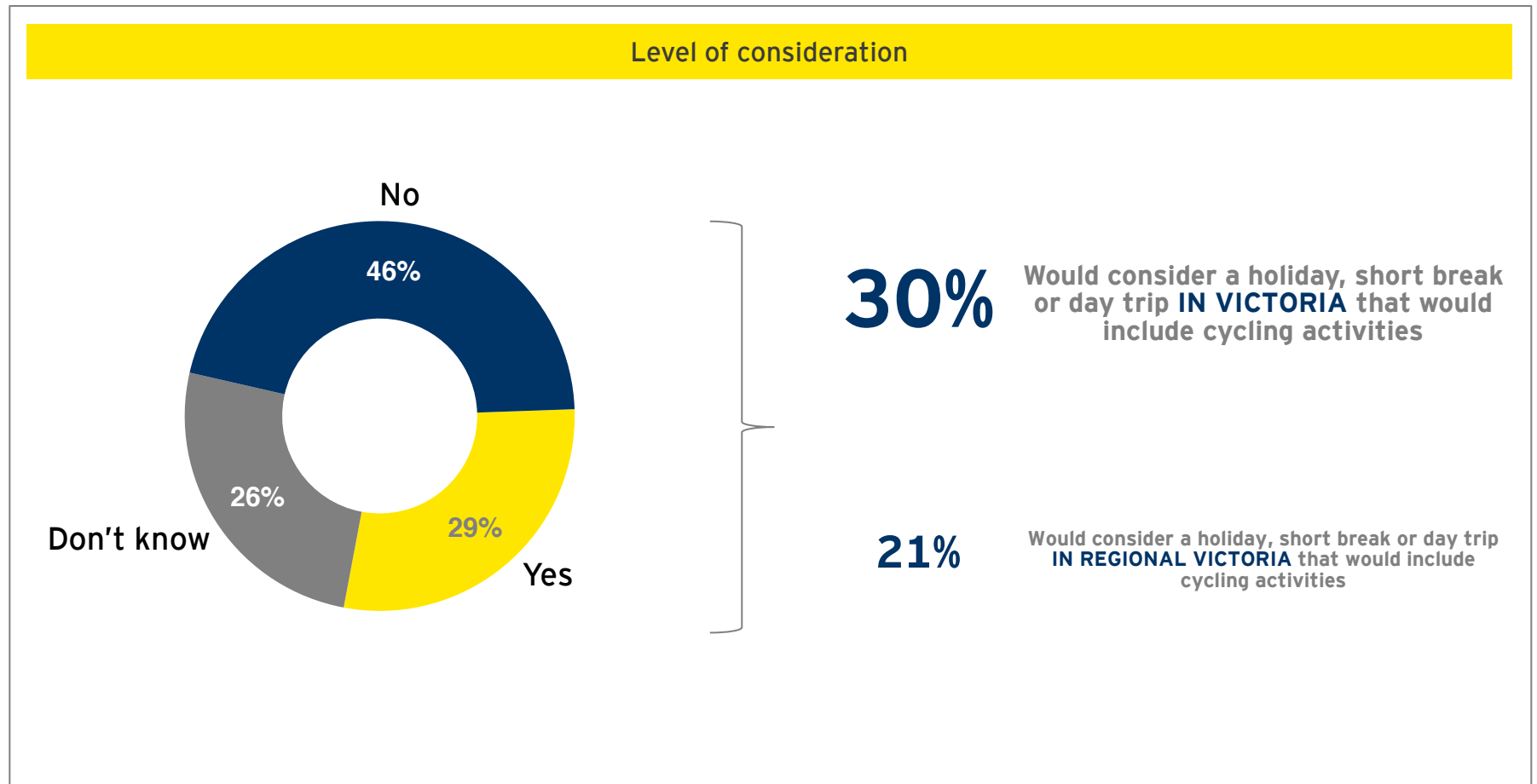


Consideration for future cycling tourism



Consideration for cycling tourism within Victoria

- ▶ Although almost half (46%) would not consider cycling tourism in the next five years, there was a substantial proportion who would consider and an opportunity to persuade those who were undecided.



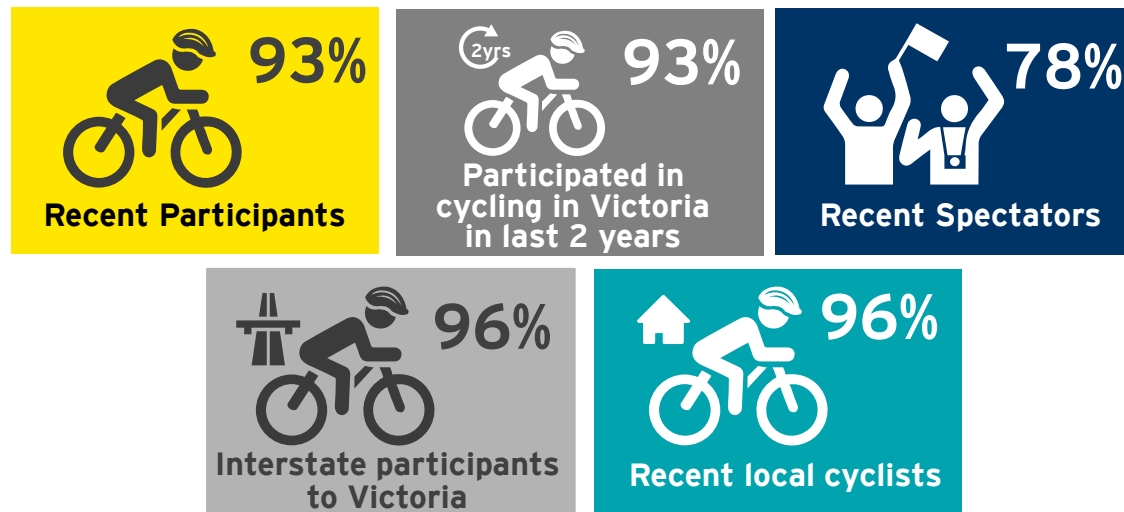
Q24. In the next five years, would you consider any plans to travel for a holiday, short break, or day trip that includes cycling as part of your activities – whether participating or spectating?

Base: Total sample (n=2,000)

Consideration for cycling tourism within Victoria

- There were 5 groups that were more likely to consider cycling tourism in the next five years. These groups were all previous participants or spectators and thus reflects the potential for repeat engagement in this category.

Groups more likely to consider cycling tourism



Q24. In the next five years, would you consider any plans to travel for a holiday, short break, or day trip that includes cycling as part of your activities – whether participating or spectating?

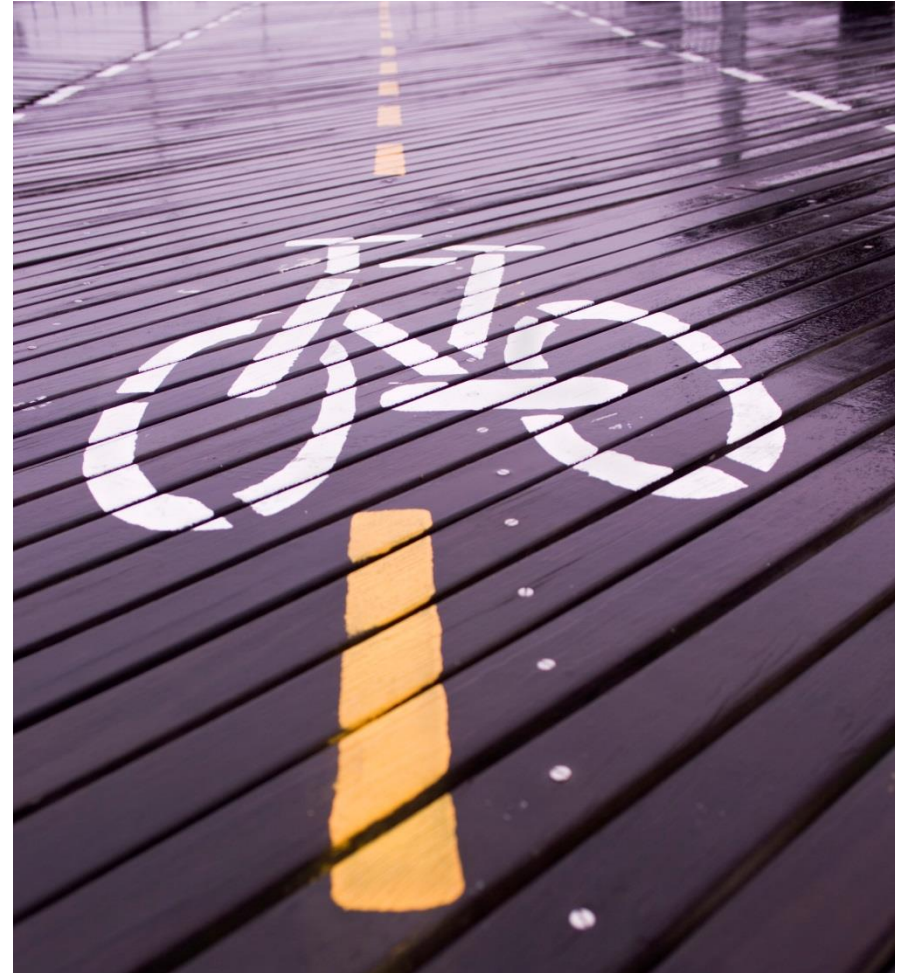
Base: Total sample (n=2,000)

Summary of preferences for different cycling experiences

- ▶ Over half (54%) of the total sample would consider (yes/don't know) a trip that included cycling (participating/spectating) in the next five years. Consideration was highest among participants (95%) yet we found that one in two (49%) of those with no cycling experience would also consider cycling tourism.

Overview

- ▶ **96% of recent local cyclists** and **93% of recent participants** would consider (yes/ don't know) a trip that included cycling in the next 5 years.
- ▶ Among the proportion of those who would consider a cycling experience in the next five years, the most common activities considered were easy, slow paced pursuits. They related to accessibility and infrastructure, with the **top two most common** responses including **dedicated cycling paths along foreshores, rivers, lakes, or rail trails**.
- ▶ Participants were more likely to consider **Melbourne (38%), Sydney (30%)** and **Perth (16%)**.
- ▶ **Victoria** was also the state or territory **most likely to be visited** by those who would consider a trip that included a cycling experience.





Creating a value proposition



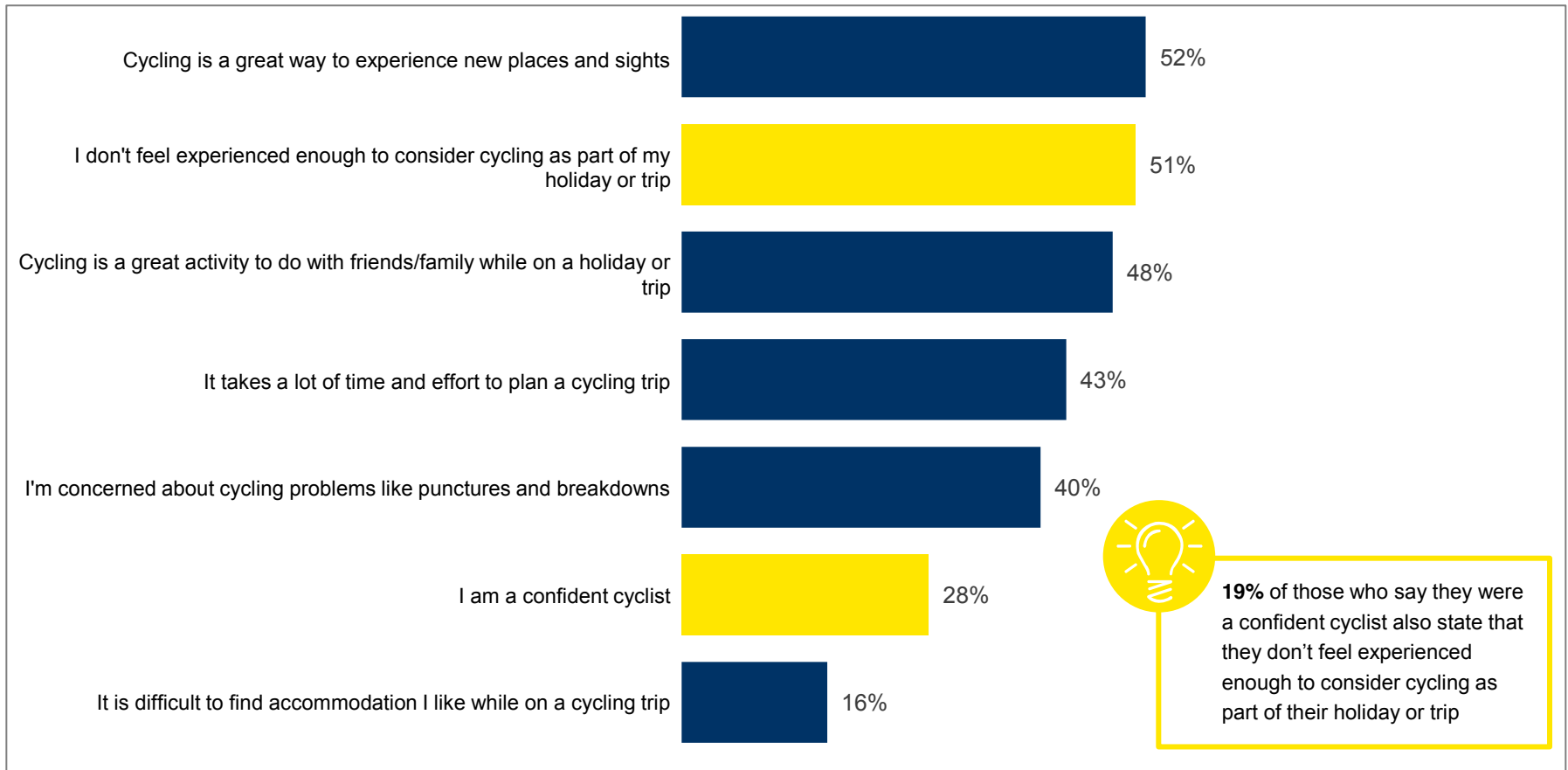
Communications
should focus on
education and
position cycling
tourism as part of
a broader travel
experience.

Attitudes to cycling



Attitudes to cycling and cycling tourism

- Half (52%) of those surveyed believe that cycling is a great way to experience new places and sights. However, one in two (51%) don't feel experienced enough to consider cycling as part of their holiday or trip, with females (56%) and those aged 55-69 years (58%) significantly more likely to think so. This is understandable given that only three in ten (28%) consider themselves confident cyclists.

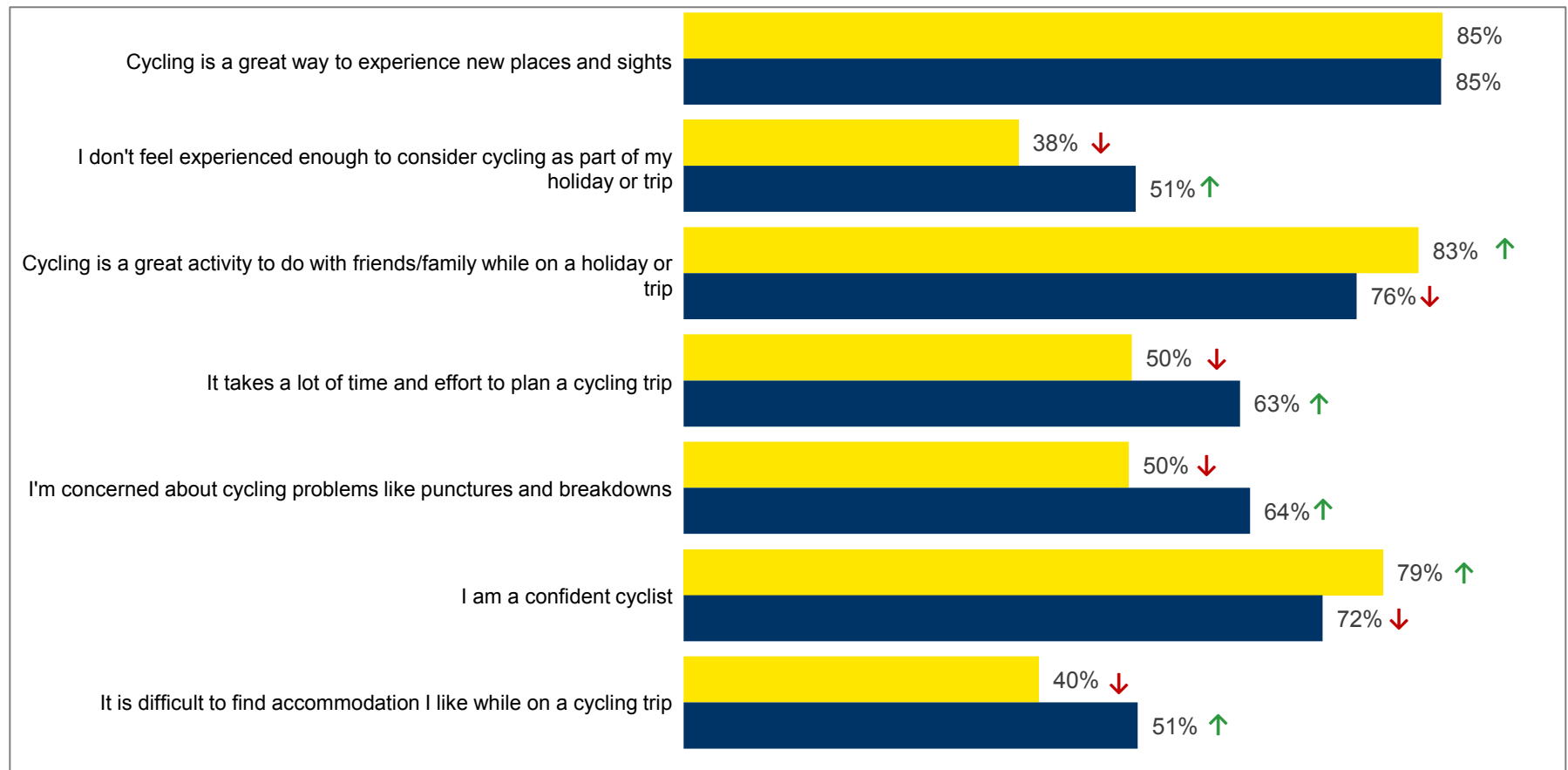


Q22. To what extent do you agree or disagree with each of the following statements about cycling, or a cycling holiday, getaway, or experience? (AGREE/STRONGLY AGREE ONLY)

Base: Total sample (n=2,000)

Attitudes to cycling and cycling tourism by type

- Participants were far more positive towards cycling and cycling tourism when compared with spectators. Although both groups similarly agreed that cycling is a great way to experience new places and sights (both 85%), spectators had more perceived barriers to participation, particularly cycling experience, planning time and effort, and finding accommodation.



Q22. To what extent do you agree or disagree with each of the following statements about cycling, or a cycling holiday, getaway, or experience? (AGREE/STRONGLY AGREE ONLY)

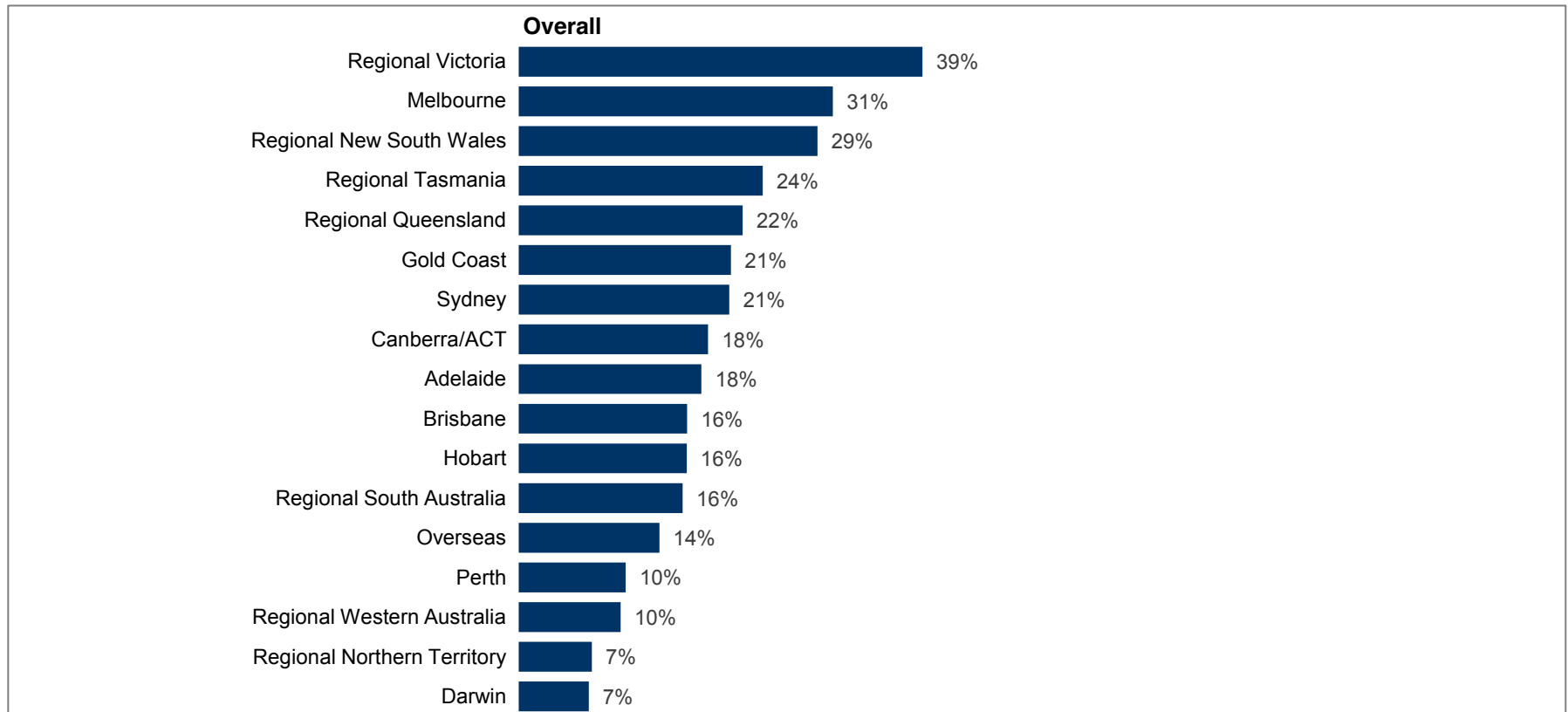
Base: Participants (n=408), Spectators (n=283)

Considerations for cycling tourism



All areas considered for a cycling experience by type

- ▶ Those who would consider a cycling experience as part of a future holiday, short break, or day trip often selected regional areas as a potential destination. Regional Victoria (39%), New South Wales (29%), and Tasmania (24%) and Queensland (22%) were popular regional destinations. Melbourne (31%) was the most frequently selected metropolitan destination.
- ▶ This shows a disconnect between behaviour and aspiration. In other words, while regional destinations may be highly considered, convenience and accessibility may make metropolitan destinations more popular.

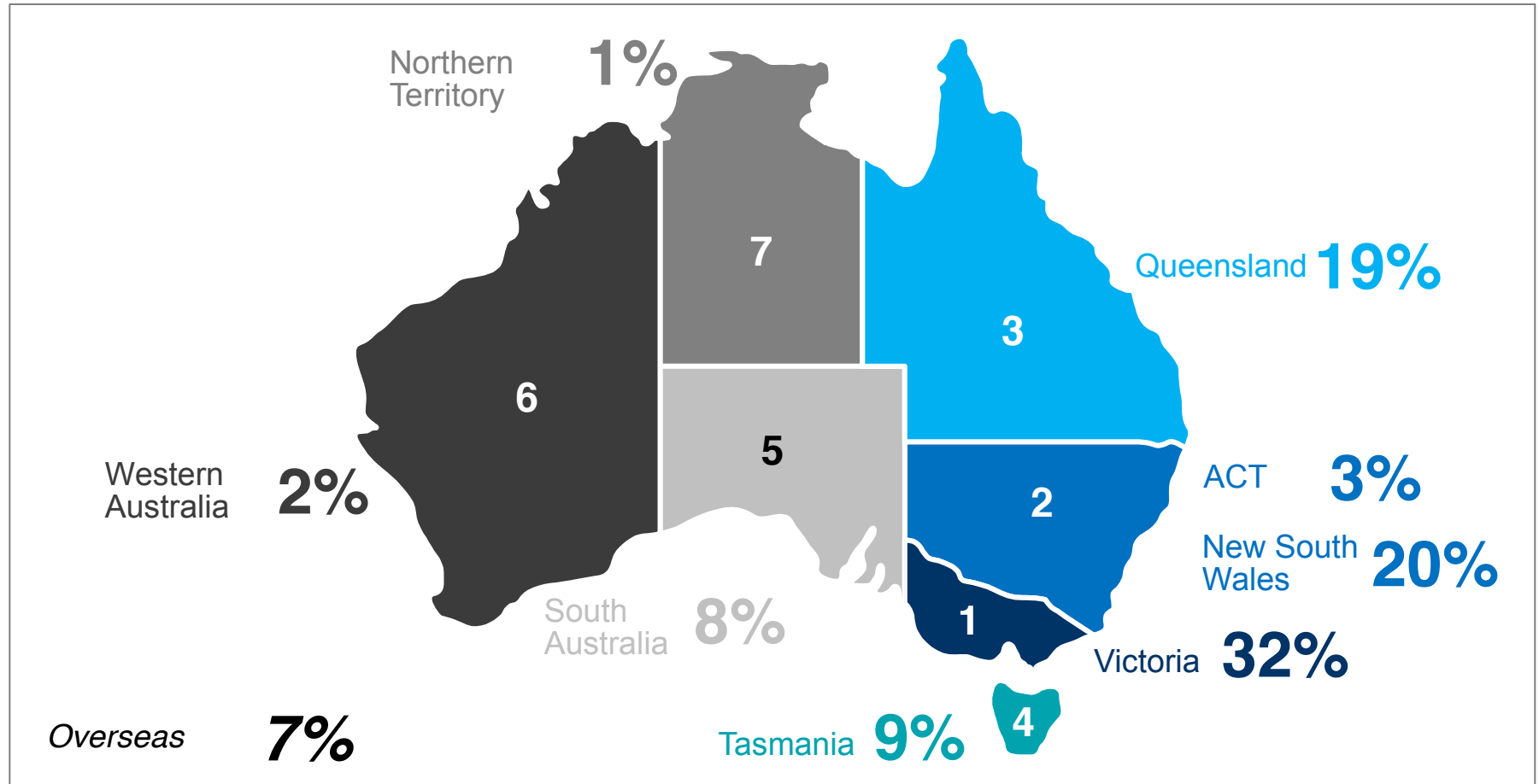


Q26. Where would you consider travelling for your holiday, short break or day trip that would include a cycling experience?

Base: Those who would consider a cycling experience in the next five years (n=1,139)

Where would people most likely go for cycling tourism?

- Consistent with attitudes over which state is *best* for cycling tourism, Victoria ranked highest as the state most considered for a cycling tourism experience.



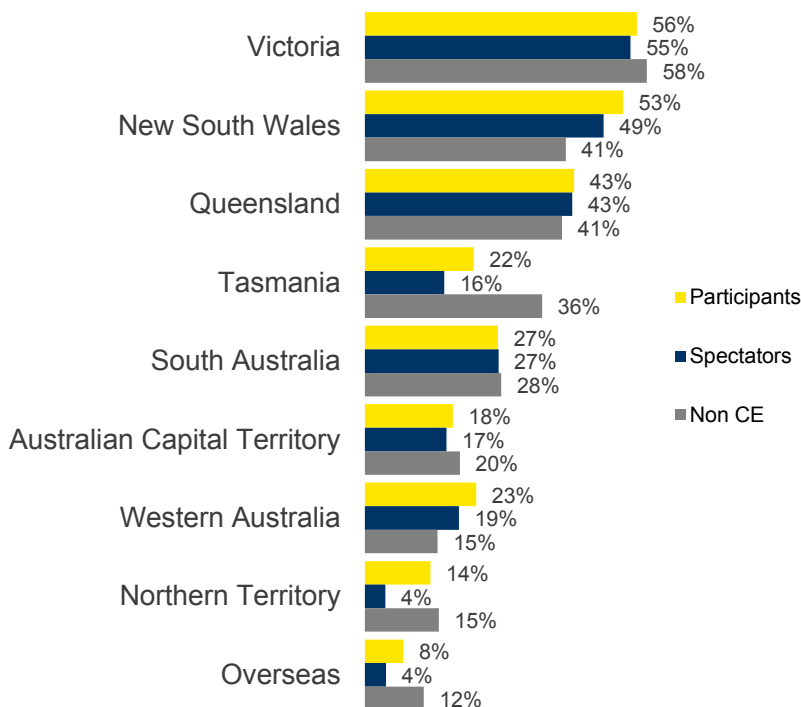
Q27. Of those that you would consider visiting, which location would you **most likely** visit?

Base: Those who would consider a cycling experience in the next five years (n=1,139)

Preferred destinations for a cycling tourism experience

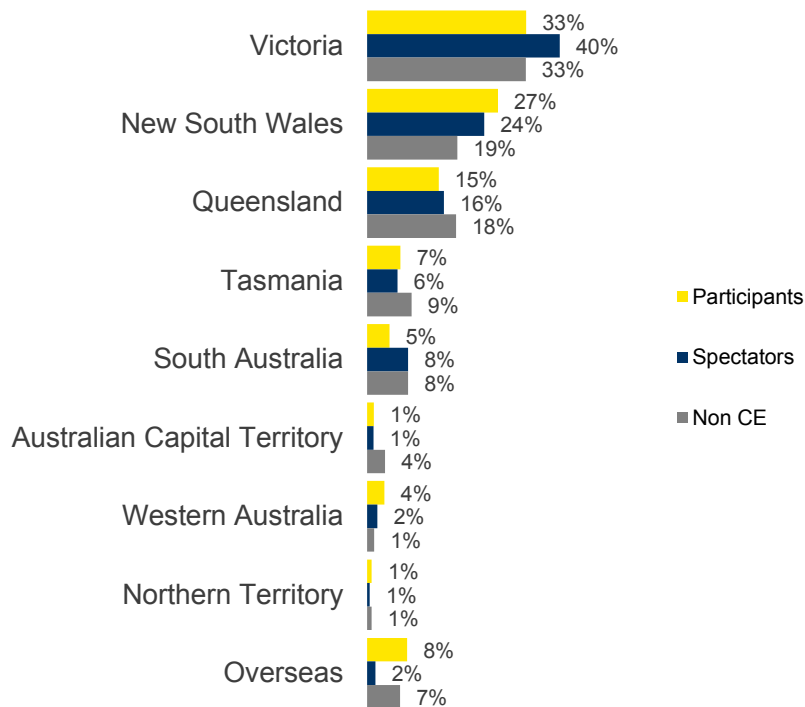
Any states and territories considered (by type)

- Victoria was the most considered state or territory amongst all types followed by NSW and Queensland.



Most likely to visit (by type)

- Victoria was also the state or territory most likely to be visited by those who would consider a trip that included a cycling experience across all three types.



Q26. Where would you consider travelling for your holiday, short break or day trip that would include a cycling experience?

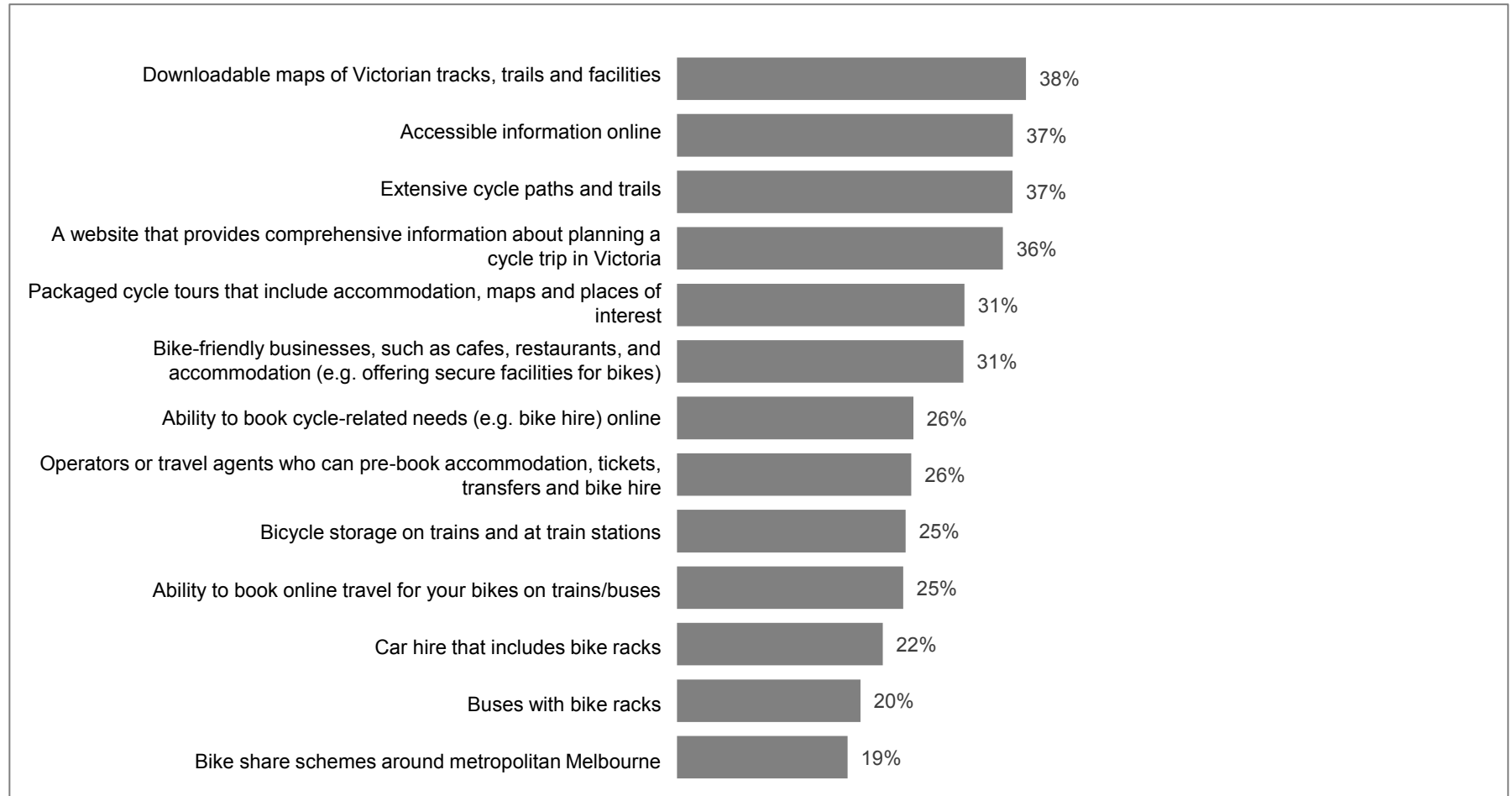
Q27. Of those that you would consider visiting, which location would you **most likely** visit?

Base: Participants (n=383), Spectators (n=256), Non CE (n=489)

Encouraging cycling tourism

Most appealing ideas to encourage visiting Victoria

- When we prompted considerers with ideas to encourage visitation to Victoria for a cycling experience, we found that ideas like downloadable maps, online information and websites resonated.

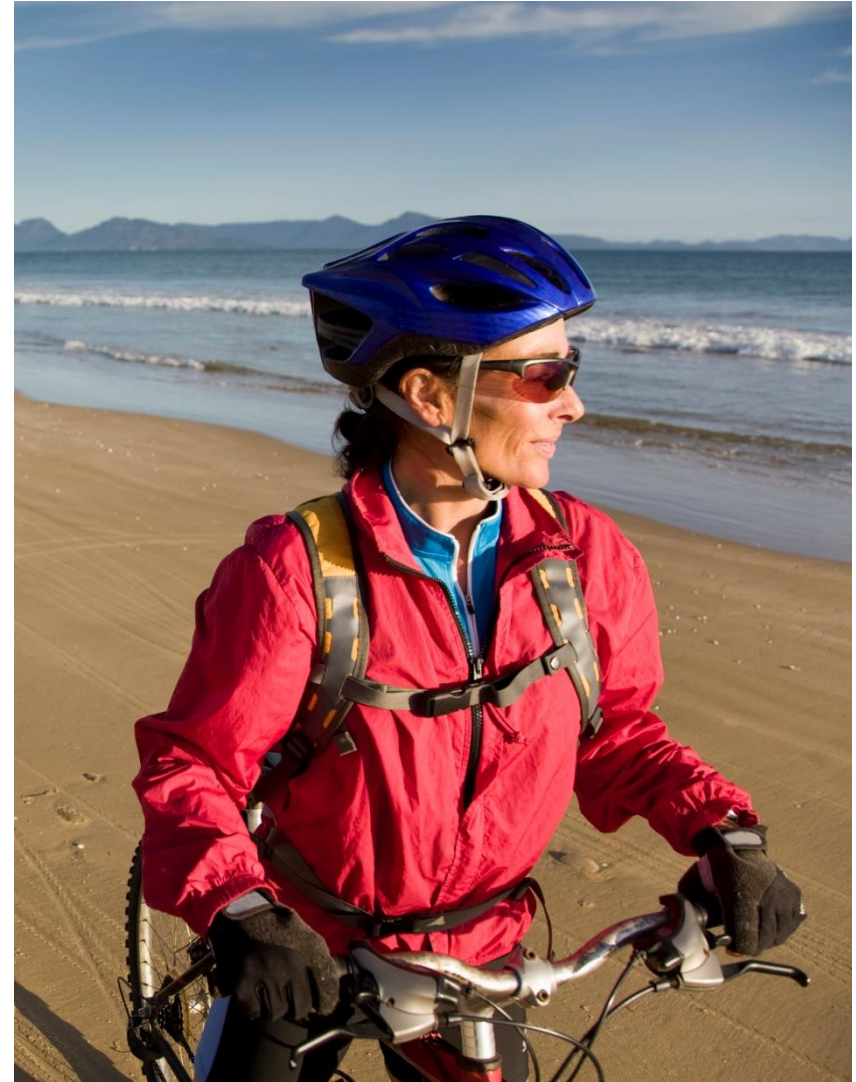


Q30. How appealing do you find each of the following ideas? - VERY APPEALING ONLY

Base: Those who would consider a cycling experience in the next five years (n=1,139)

Most appealing ideas to encourage visiting Victoria

- ▶ Similar to recent participants, initiatives that would encourage local cyclists to visit Victoria were extensive cycle paths and trails, downloadable maps of Victorian tracks, trails and facilities and accessible information online.
- ▶ Ideas that appeal to recent local cyclists more than recent participants were operators or travel agents who can pre-book accommodation, tickets, transfers and bike hire (37%), bicycle storage on trains and at train stations and buses with racks. This suggests that the convenience of organising a cycling experience is more important to local cyclists and they may have more propensity to use public transport for trips involving a cycling experience (as we know they were more likely to own their bike compared to recent participants). A lack of experience in cycling tourism could also play a role in these results.



Barriers to engaging in cycling experiences

- Key barriers to cycling tourism engagement related to cost and information.



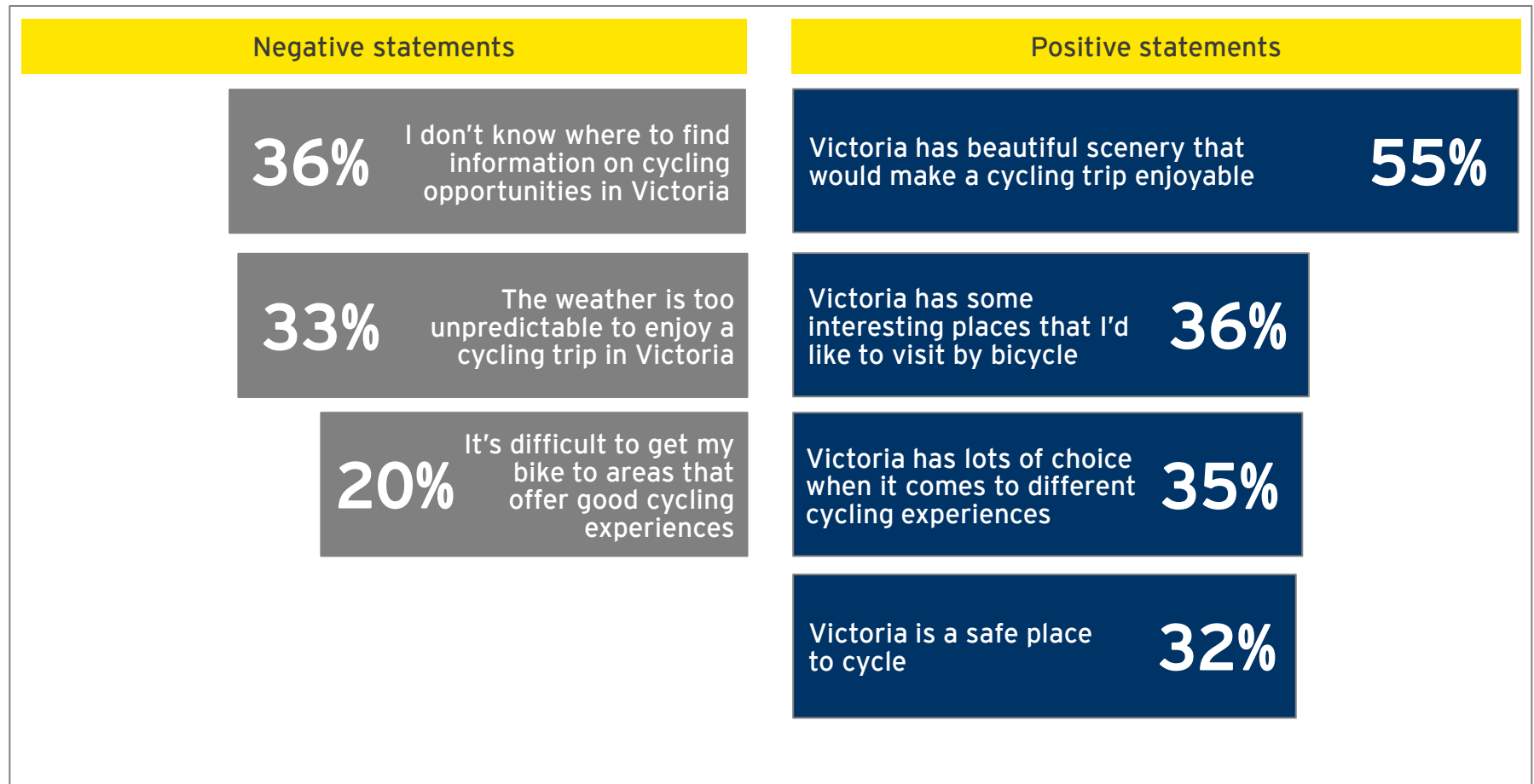
Barriers

- **Cost-related aspects (16%)** were the most common factors that would motivate considerers who did not consider Victoria as a cycling destination, followed by **information/awareness factors (10%)**.
- Cost-related aspects were significantly less of a motivating factor for those travelling to **metro destinations (8%)**.
- **Three of the top four** ideas that would encourage visitation relate to information about the cycling experience: downloadable maps or tracks, trails and facilities (**39%**), accessible information online (**38%**) and a website that provides comprehensive information about planning a cycle trip in Victoria (**37%**).
- Possible initiatives to **encourage cycling tourism in Victoria** were significantly more likely to appeal to those who were more likely to have a higher engagement with cycling tourism and have prior experience (participants). Such initiatives include **Bike-friendly businesses**, such as cafes, restaurants, and **accommodation** (e.g. offering secure facilities for bikes, packaged cycle tours that include accommodation, maps and places of interest and operators or travel agents who can pre-book accommodation, tickets, transfers and bike hire. A possible explanation that these initiatives resonate more with this group as they were more likely to have had prior experience with dealing the frustrations and pitfalls of cycling tourism.

Victoria and cycling tourism

Attitudes to Victoria as a destination for cycling tourism

- The key drawcard for encouraging intrastate and regional cycling tourism in Victoria is promoting its desirable nature destinations and scenery. However, the challenge is to provide education and assurance.



Q23. To what extent do you agree or disagree with each of the following statements about **Victoria** as a destination for a cycling holiday, getaway, or experience?(AGREE/STRONGLY AGREE ONLY)

Base: Total sample (n=2,000)

Attitudes to Victoria as a destination for cycling tourism

- More than half of the sample believed that Victoria has beautiful scenery that would make a cycling trip enjoyable. Males were more positive than females towards Victoria as a destination for cycling tourism.

	Overall	Type		
		Participants	Spectators	Non CE
Victoria has beautiful scenery that would make a cycling trip enjoyable	55%	77%	76%	76%
I don't know where to find information on the cycling opportunities in Victoria	36%	66%	65%	63%
Victoria has some interesting places that I'd like to visit by bicycle	36%	74%	74%	72%
Victoria has lots of choice when it comes to different types of cycling experiences	35%	40%	46%	38%
The weather is too unpredictable to enjoy a cycling trip in Victoria	33%	70%	67%	67%
Victoria is a safe place to cycle	32%	50%	54%	48%
It's difficult to get my bike to areas of Victoria that offer good cycling experiences	20%	43%	50%	42%

Q23. To what extent do you agree or disagree with each of the following statements about **Victoria** as a destination for a cycling holiday, getaway, or experience?(AGREE/STRONGLY AGREE ONLY)

Base: Total Sample (n=2,000)
Participants (n=408), Spectators (n=283), Non CE (n=1,090)



Conclusions and recommendations

Overall conclusions





The cycling
tourism market
in Australia is a
niche market.

The state of cycling tourism

We found that awareness, familiarity, consideration, and even the penetration of cycling tourism in Australia is low. This indicates that, as a local, leisure, or holiday activity, there is considerable opportunity for growth and improvement.

Given that 85% of Australians have not included a cycling experience as part of a holiday, experience, or daytrip, we believe that there is a need to build awareness of cycling tourism and experiences. Even amongst existing participants and spectators, the lack of a standout source of information indicates that the market has not matured to provide an evoked information highway to plan and book cycling tourism experiences.

The need to educate participants, spectators, and those without cycling experiences (non CE) is best demonstrated when we asked opinions on which states and territories would be best for cycling tourism overall, and on four distinct dimensions. We found that in many cases, respondents were simply unable to make judgements over different regions and their suitability for cycling experiences. Our experience in researching other tourism experiences shows that in more mature markets, respondents were able to make speculative judgements about areas, even if they have not visited the location or participated in a relevant activity.

Perhaps the biggest indicator of cycling tourism in Australia, is the reported needs of participants, spectators, and those without cycling experience. Most called for developments that might be described as hygiene factors, namely downloadable maps and online information. This reflects a desire to learn rather than compare, and addressing this need may propel the cycling tourism industry further along the lifecycle.



A photograph of a lush forest with tall, moss-covered trees and a dense undergrowth of green ferns. Two mountain bikers are riding on a narrow dirt trail. The biker in the foreground is wearing a yellow shirt and a blue helmet, and is blurred due to motion. The biker in the background is wearing a red shirt and a blue helmet. A yellow-bordered text box is overlaid on the left side of the image.

Victoria is seen
as an appealing
destination for
cycling tourism.

Victoria desirable for cycling tourism

Our research showed that 17% believe that Victoria is the best destination for cycling tourism (ranked 1st). This view was supported by the fact over half agree that Victoria has beautiful scenery for a cycling trip and that 41% would consider visiting regional Victoria for a cycling experience – more than any other state or territory.

These findings suggest that any growth in the cycling tourism industry is likely to benefit Victoria rather than any other state. This should encourage further investment in growing cycling tourism as a category. It also indicates the opportunity to lead other states and territories in owning the position as “best” in cycling tourism. Although 32% of those considering a cycling experience would choose Victoria as a destination, we found that most were unsure how to compare different states and territories on dimensions of cycling experiences, such as quality of tracks, facilities, and related accommodation.

When we analysed the origin of participants and spectators who have visited for Victoria for cycling tourism, we found that many were from interstate, particularly NSW. This suggests that broadly communicating the benefits of cycling tourism via an educational campaign will lead to growth in cycling experiences as part of new or existing interstate trips.



Recommendations for marketing practice



The development framework for Victorian cycling tourism...

Configure



Communicate



Deliver



Configure

- When constructing the value proposition, there should be a focus on simplicity, access, and convenience to help meet the needs of those who were new to the concept of cycling tourism, reflecting the lifecycle stage of the market.

Configure



Key Insights



Amongst those who wouldn't consider **Victoria** for cycling tourism, **35%** of respondents don't know what would **motivate** them to visit Victoria



A **lack of information** on cycling tourism in Victoria was highlighted as both a **barrier** and as a **prevalent attitude**



The simple **demand** for cycling **paths** reflects the importance of **access**, **convenience**, and **confidence**



Nature, **scenery**, and **sightseeing** was a core part of the cycling **experience** and is a potential **differentiator** in the market

Configure

- ▶ When constructing the value proposition, there should be a focus on simplicity, access, and convenience to help meet the needs of those who were new to the concept of cycling tourism, reflecting the lifecycle stage of the market.

Configure



Things to do...



A **reason** to go: **Half** of respondents agreed that it's a great way to **experience** new places and that it's a great **social** activity



An **online** experience that provides basic, **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

- Communications not only need to evoke the calls to action for cycling tourism, but address the barriers that follow – specifically access, convenience, and confidence.

Communicate



Key Insights



The biggest **driver** of **consideration** for cycling tourism is the level of **confidence** and capability including cycling as part of a **holiday**



The second biggest **driver** of **consideration** is the social **connection** aspect with **family** and **friends**



Victoria was seen **positively** on important dimensions, particularly **scenery**, and thus should be **highlighted**



There were **few preconceptions** around cycling tourism, highlighting the need to **generate awareness**, not overcome **myths**

Communicate

- Communications not only need to evoke the calls to action for cycling tourism, but address the barriers that follow – specifically access, convenience, and confidence.

Communicate



Things to do...



Promote the dedicated bike paths and facilities, highlighting the **ease** to 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 **considerers** on the **beauty** of Victoria's **regional** areas



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

Deliver

- In delivering the value proposition, it is imperative that proof points align with the key drawcards for Victoria by promoting specific events, locations, and businesses.

Deliver



Key Insights



Bike friendly businesses and **packaged cycling** tours were **appealing** factors to many in the **potential** market



Victorians believed that their **state** had **interesting** places to see by **bicycle**, and **sightseeing** was a common cycling experience



The **Great Ocean Road** was a standout **destination**, but other regional Victoria areas were not **associated** as strongly with cycling

Deliver

- In delivering the value proposition, it is imperative that proof points align with the key drawcards for Victoria by promoting specific events, locations, and businesses.

Deliver



Things to do...



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**

Regression analysis | Introduction

What is Regression Analysis?

Regression analysis can be used to determine what perceptions, experiences or drivers are the key drivers or predictors of attitudes or behaviours.

It can be used across a range of situations where a number of variables could be considered to be drivers of some broader attitude or behaviour, but most commonly it is used in customer satisfaction studies, where it is used to identify which variables are the key drivers of customer satisfaction.

- The specific statistical algorithm used in the regression analysis was logistical regression analysis.

What does a Regression Analysis tell us?

- ▶ A regression analysis tells us which elements of the consumer experience actually predicts or drives consideration.
- ▶ Each possible driver of consideration in the analysis has the following information associated with it:
 - Whether it is a statistically significant predictor of cycling as part of a holiday, short break or daytrip consideration.
 - An 'impact value' (technically a beta value). When there are two or more statistically significant predictors in a regression, these impact values tell us which predictor is the most impactful, which is the next impactful, and so on.
- ▶ **For cycling tourism**, this will shed light on the factors that are really important in influencing consideration, and should give guidance on what factors should be a priority to focus on in marketing communications to promote market growth over others.

Why did we run Regression Analysis?

- ▶ People often have little insight into which aspects of an experience are most influential for them, particularly if they are satisfied with the experience overall:
 - Indeed, it is not unheard of for people to claim that a particular element is the most important in influencing their consideration, but then when this element (and satisfaction with it) is improved, no change in overall consideration levels is observed!
- ▶ One of the advantages of regression analysis is that it digs deeper to identify which aspects of are truly influential in creating consideration (or lack of it) without asking a person to tell us what they think is most important.
- ▶ In order to determine *how* Tourism Victoria should increase cycling tourism, we conducted a regression analysis on consideration to identify salient emotional drivers. This will aid in rationalising marketing investment and guide marketing strategy.

Driving consideration for cycling tourism

- Below is the output of regression conducted for this report, to unpack what truly drives consideration for a cycling experience as part of a holiday, short break or daytrip in the next 5 years. Here we can see the extent to which a change in the level of agreement with the below specific statements would influence overall consideration for a cycling experience.

Drivers of consideration

1	I don't feel experienced enough to consider cycling as part of my holiday or trip	32%
2	Cycling is a great activity to do with friends/family while on a holiday or trip	31%
3	Cycling is a great way to experience new places and sights	18%
4	It is difficult to find accommodation I like while on a cycling trip	12%
5	It takes a lot of time and effort to plan a cycling trip	7%



Consideration of a cycling experience*

**These five factors explain 75% of overall consideration*

Recommendations from the regression analysis

- A lack of cycling experience, the opportunity to build connection, a great way to experience new places and sights, perceived difficulty in finding accommodation and time and effort required to plan a trip were the five most significant drivers of cycling tourism consideration.

Providing easy access to relevant, easy to understand information is essential in alleviating concerns about a lack of experience (1), perceived difficulty in finding accommodation (4) and time and effort required in planning a cycling trip (5)

Highlighting the potential of a cycling trip to build connection with others such as friends and family (2) will resonate strongly on an emotional level for considerers

Building awareness of opportunities to engage in cycling activities while on holiday will encourage considerers to participate.

The unique lens of experiencing nature and new environments through riding a bike (3) is a factor that has a strong influence on consideration

Educate and penetrate

1. Educate the market: There was a clear call for infrastructure and ease of engagement as the two most common conceived activities related to dedicated cycling infrastructures (rail trails and bicycle paths). This call out not only speaks to the perceived difficulty of cycling, but suggests these factors were hygiene in nature. Educating the market as to the availability and diversity of dedicated cycling infrastructure will likely increase consideration amongst those non-travellers who were also considerers.

2. Penetrate existing travel experiences: Given the infancy of the market, offers that accentuate cycling experiences were less likely to resonate. Instead, encouraging travellers to include a cycling experience as part of other trips and experiences is likely to meet less resistance from a physical and attitudinal viewpoint.



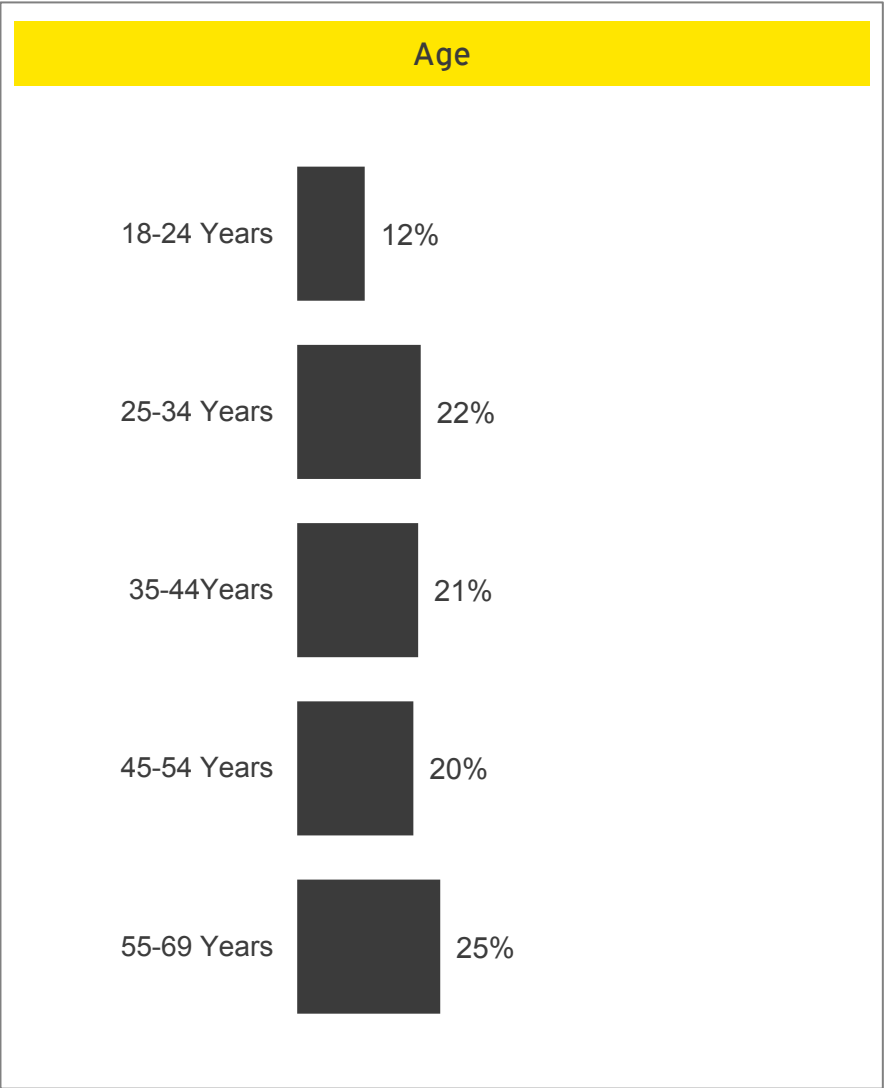
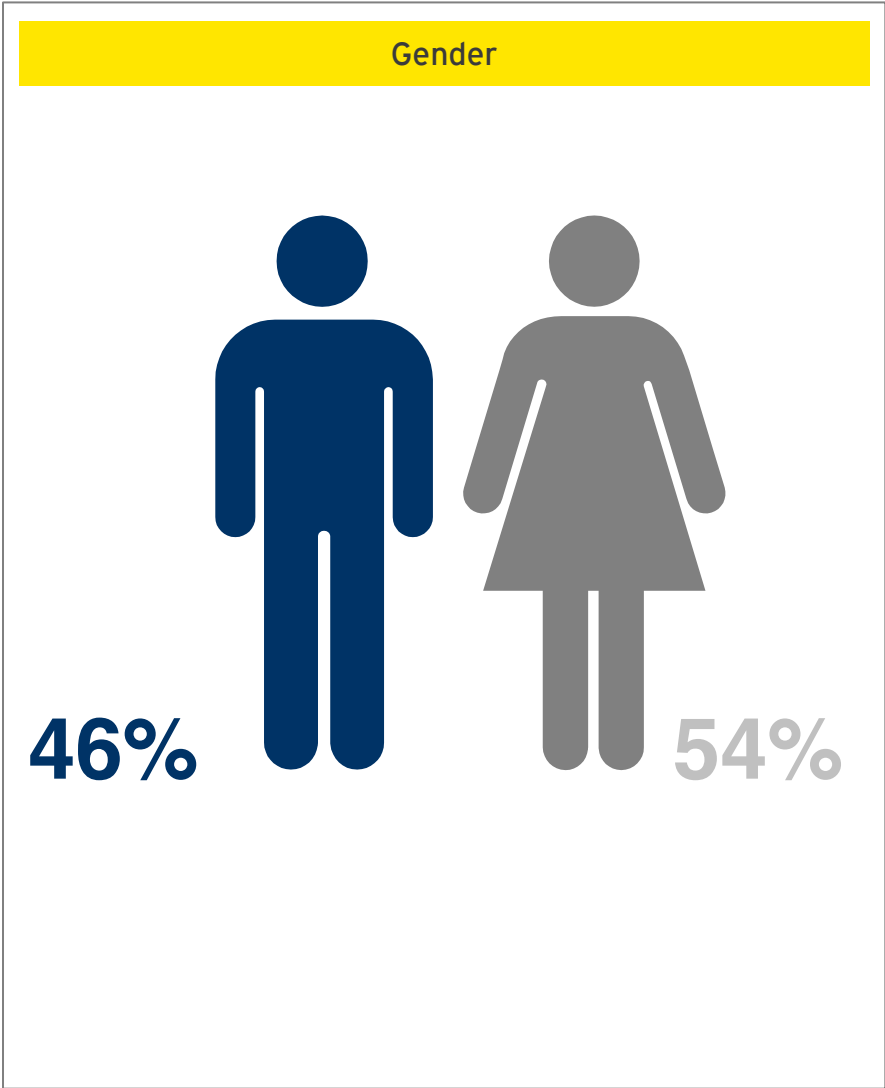
Although there were **key differences** between **groups**, addressing **simple barriers** will universally **resonate**.





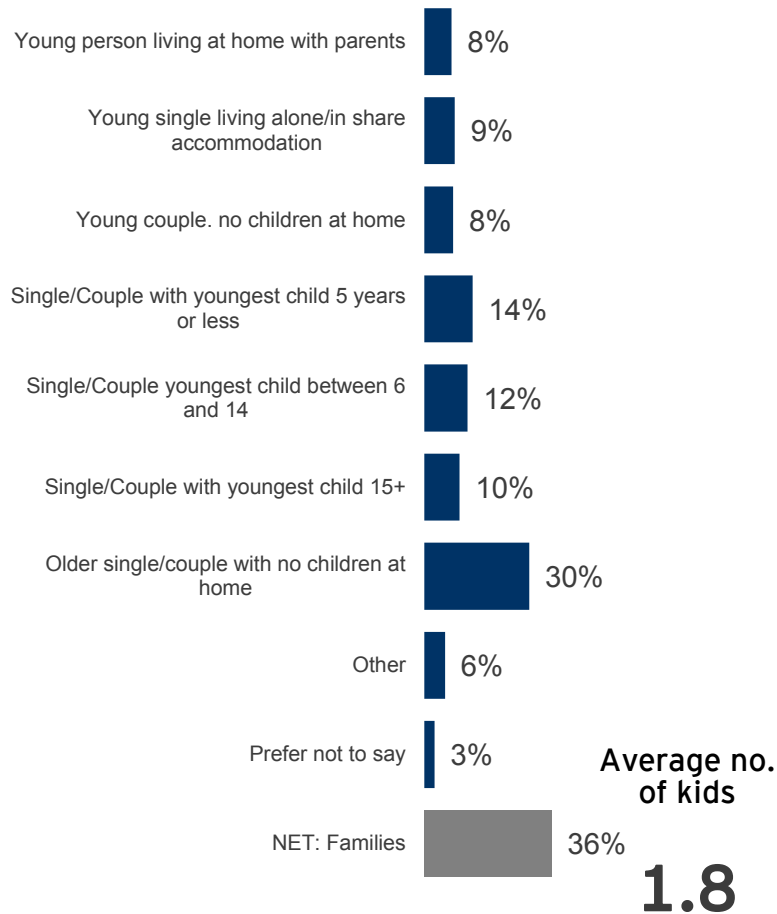
Classification and appendices

Sample demographics: Age and Gender

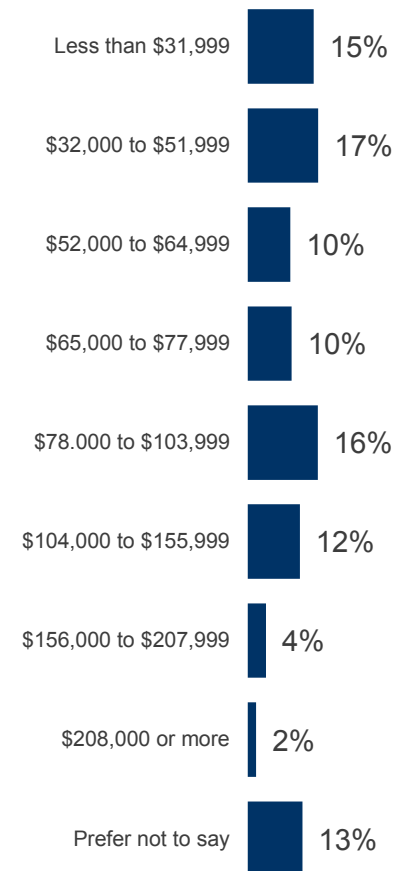


Sample demographics: Income and Household status

Household status



Income



Appendix 1:

Sample structure and sub-groups



Sample structure - metro vs. regional

- Below is a table with a further breakdown of the sample by metro versus regional locations. The sample was then weighted to the 2013 ABS Census for gender, age and location to ensure that it was representative of the population.

Sample Structure										
Age	Melbourne	Rest of VIC	Sydney	Rest of NSW	Brisbane	Rest of QLD	Adelaide	Rest of SA	ACT	TOTAL
18-34	144	40	180	62	90	62	40	14	12	644
35-54	156	48	192	72	96	68	44	16	16	708
55-69	146	40	180	62	90	62	40	16	12	648
TOTAL	446	128	552	196	276	192	124	46	40	2,000

Defining further sub-groups

- Although understanding participants, spectators and non cyclists provides an overview of the cycling tourism industry, we can better understand the context by differentiating these groups by where they travel, where they were from and the duration of their trip.

Intrastate vs. interstate destination



Participants who have participated in cycling tourism on their most recent trip within their own state



Participants who have participated in cycling tourism on their most recent trip outside their state but within Australia

Destination of most recent cycling tourism experience



Metropolitan

Most recent cycling tourism experience was in a metropolitan area (includes Gold Coast)



Regional

Most recent cycling tourism experience was in a regional area (excludes Gold Coast)

Day vs. Overnight

Day trip

Participants who did not spend a night away on their most recent trip away that included a cycling experience

Overnight

Participants who spent at least one night away on their most recent trip away that included a cycling experience

Intrastate vs. interstate destination

- 58% of recent participants travelled intrastate on their last trip that included a cycling experience, compared to 42% who travelled interstate. A higher proportion of intrastate travellers went to a regional destination (35% vs 21%), suggesting that regional destinations have an opportunity to entice interstate participants travelling to metro destinations for their cycling experience.

Intrastate destination

58%



**Intrastate
Participants**

Participants who have participated in cycling tourism on their most recent trip within their own state

35% travelled to a regional destination.

20% did not spend at least one night away.

Interstate destination

42%



**Interstate
Participants**

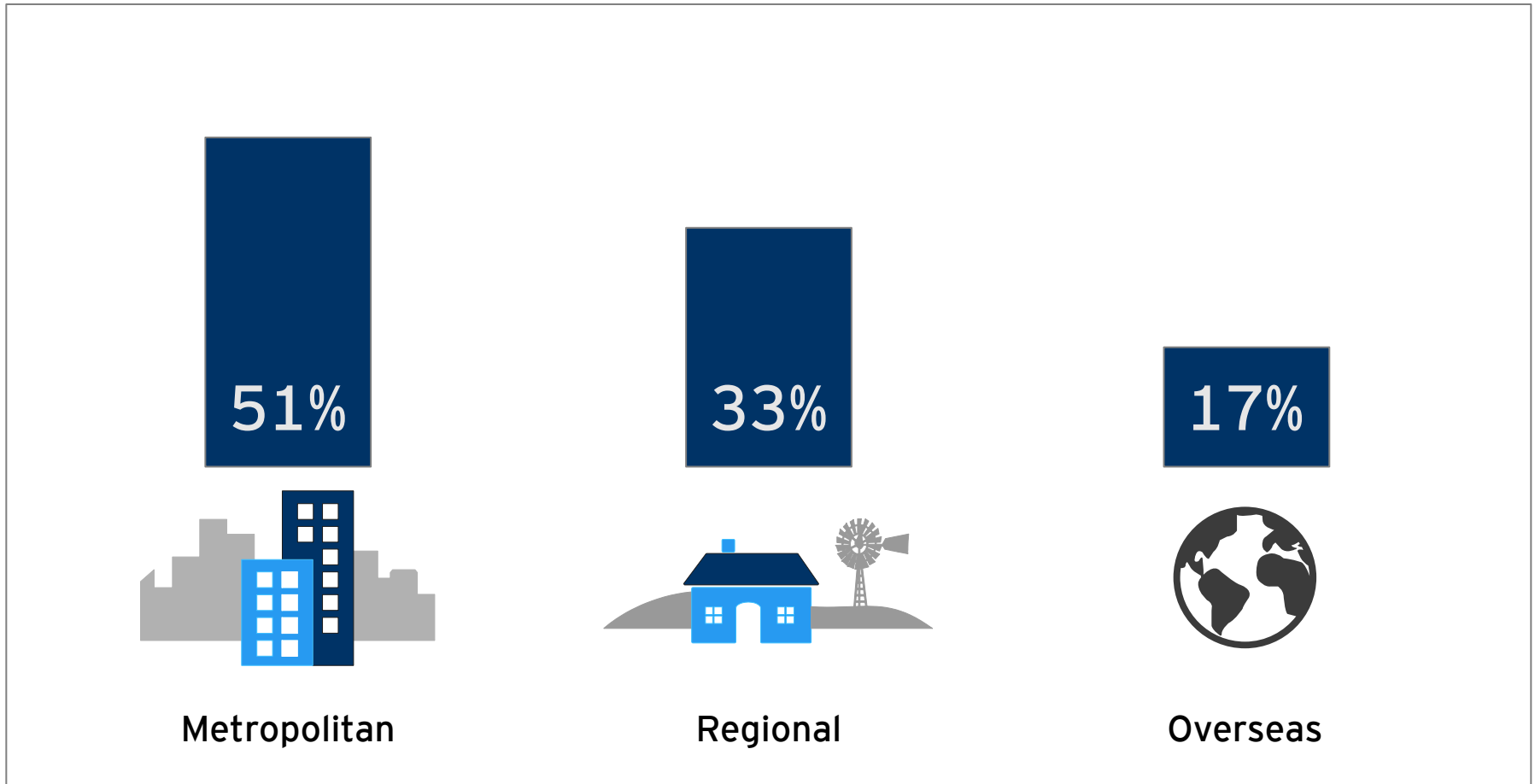
Participants who have participated in cycling tourism on their most recent trip outside their state but within Australia

21% travelled to a regional destination.

15% did not spend at least one night away.

Metro vs. regional most recent participation destinations

- Metropolitan destinations were significantly more popular than regional destinations. This suggests that the accessibility of other cities (for interstate travellers) is desirable but also that there is a need to promote regional destinations.

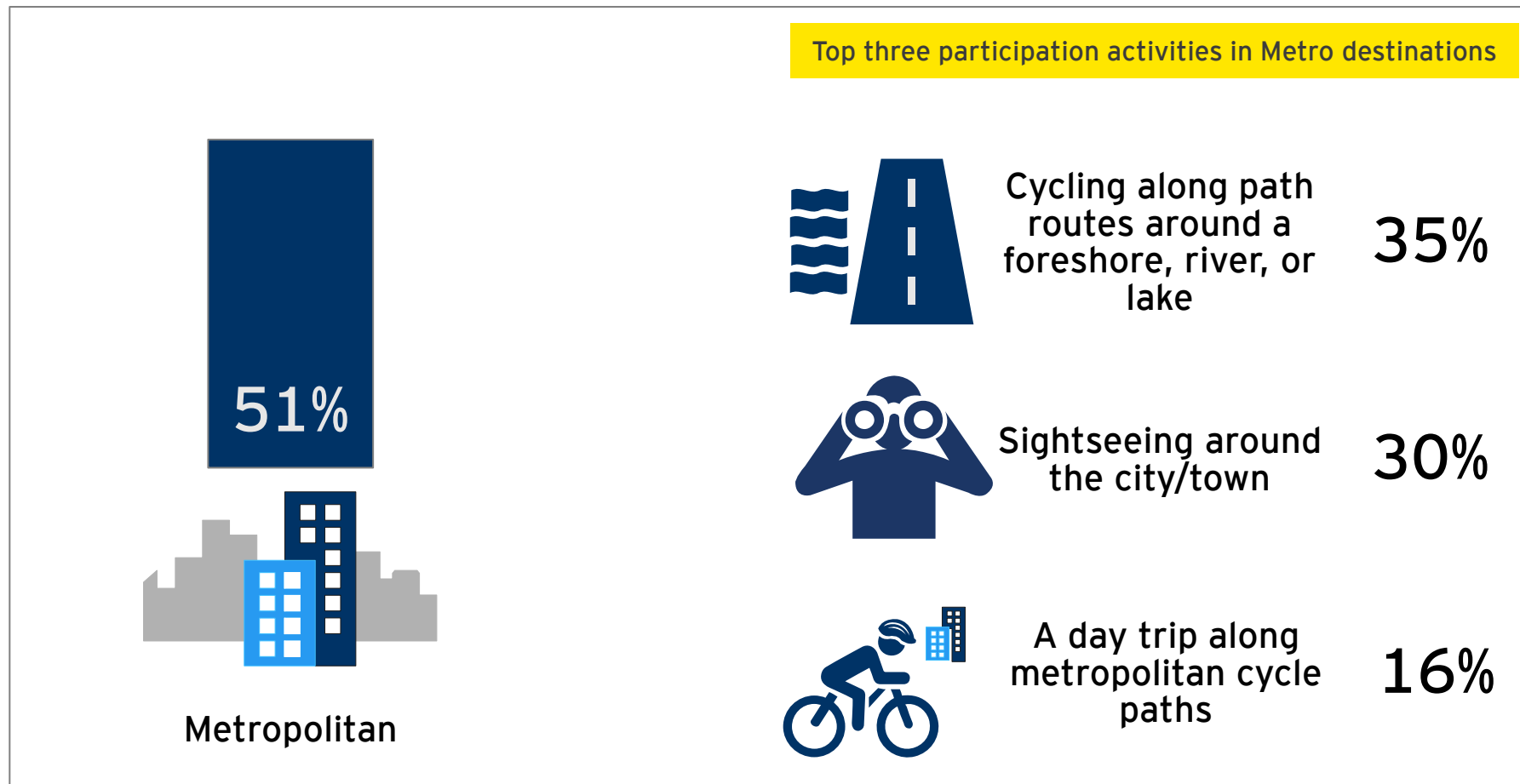


Q5. Now thinking about your **last** cycling experience, where did it occur?

Base: Participants Only (n=279)

Most recent metropolitan cycling experience

- Of those that visited a metropolitan destination on their last cycling experience (as a participant), the most common activities were cycling around foreshores/ivers/lakes, sightseeing, or metropolitan day trips.



Q5. Now thinking about your **last** cycling experience, where did it occur?
Q7. What type of cycling experience was this?

Base: Participants Only who visited a Metropolitan destination (n=279)

Day vs overnight

- Overall, 83% of participants on their most recent trip spent at least one night at their destination. Whether it was a metro or regional destination did not appear to be a major factor influencing the proportion who stayed overnight (metro 81% vs regional 84%).

Day vs Overnight

17%

Day trip



Participants who did not spend a night away on their most recent trip away that included a cycling experience

83%

Overnight



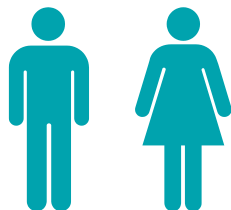
Participants who spent at least one night away on their most recent trip away that included a cycling experience

Length of stay	Metro destination	Regional destination
Base:	253	84
A day trip	19%	16%
1 night	27%	15%
2 nights	30%	22%
3 nights	9%↓	25%↑
4 nights	7%	3%
5 nights or more	9%↓	19%↑

Recent participants who travelled to regional destinations were significantly more likely to spend a total of 3 nights away (25% vs 9%) or 5 nights or more (19% vs 9%), compared to metro destination travellers.

Local Cyclists profile - demographics

Gender



64%

36%



18-24 years	19%
25-34 years	37%
35-44 years	28%
45-54 years	8%
55-64 years	7%
65-69 years	1%

Location

Melbourne	18%
Rest of Victoria	10%
Sydney	28%
Rest of NSW	12%
Brisbane	11%
Rest of Queensland	13%
Adelaide	6%
Rest of SA	2%
Canberra/ACT	0%

Income

Less than \$31,999	10%
\$32,000 to \$51,999	9%
\$52,000 to \$64,999	9%
\$65,000 to \$77,999	10%
\$78,000 to \$208,000 or more	53%
Prefer not to say	9%

Household

Young person living at home with parents	13%
Young single living alone/in share accommodation	10%
Young couple. no children at home	12%
Single/Couple with youngest child 5 years or less	24%
Single/Couple youngest child between 6 and 14	19%
Single/Couple with youngest child 15+	8%
Older single/couple with no children at home	9%
Other	1%
Prefer not to say	4%
Total: Families	51%

S1. Are you... (male/female)?

S2. Which of the following age groups do you fall into?

S3. Where do you currently live? Q40.

Approximately what is your combined household income, before tax or anything else is taken out? Please include pensions and allowances from all sources.

Base: Recent local cyclists(n=155)

Q41. Which of these statements best describes the household you are living in at present?

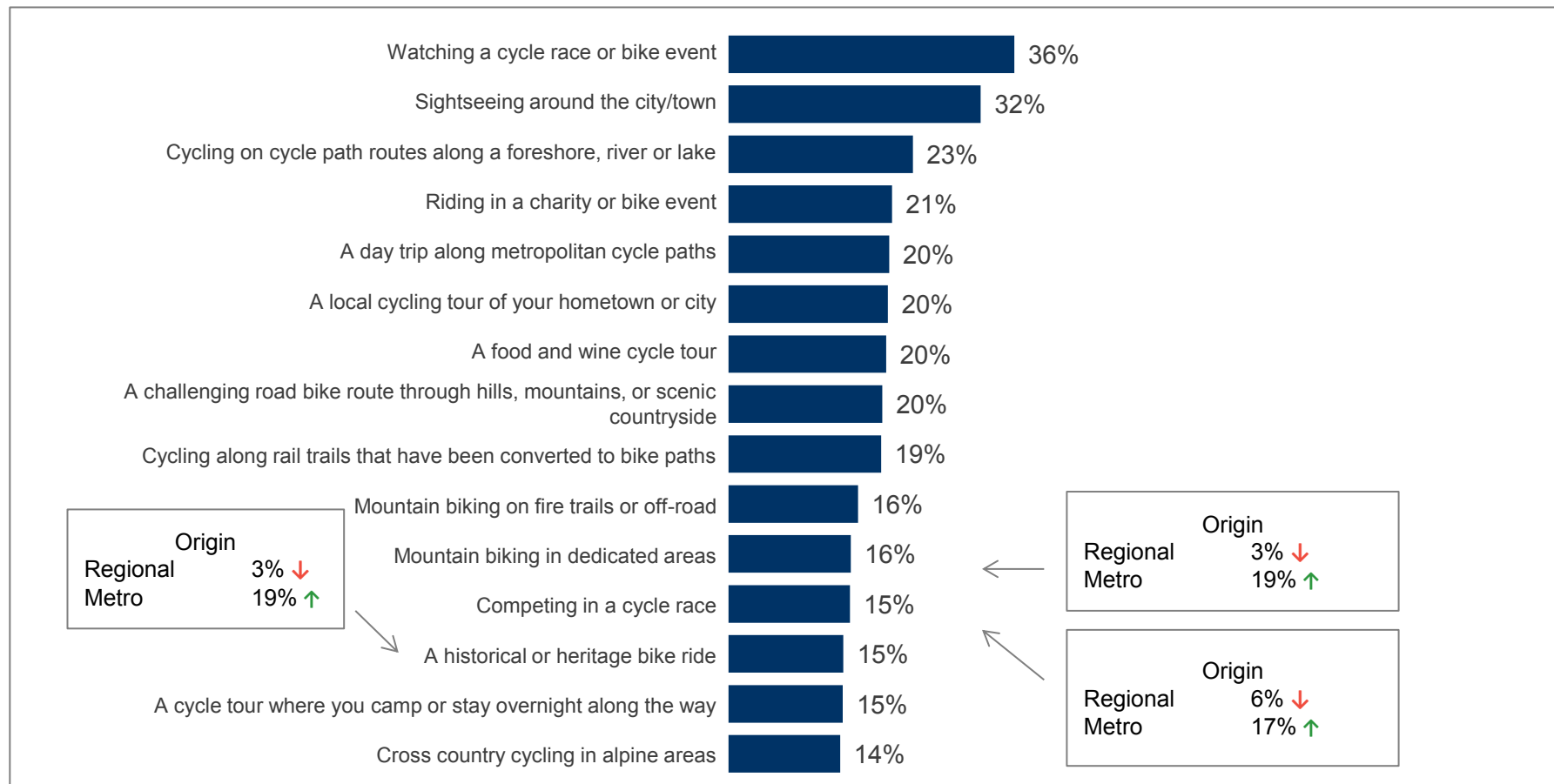
Appendix 2:

Part 1 - Participants and spectators last 2 years



Most common cycling experiences - Spectators

- In the last two years, a third of spectators have participated in sightseeing around the city/town. There were a range of activities that spectators from metro areas were significantly more likely to take part in including a food and wine cycle tour, a historical or heritage bike ride and mountain biking in dedicated areas



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

Base: Spectators (n=284)

Note: **Green** text indicates significantly higher than the total and **red** text indicates significantly lower than the total

Participants versus Spectators

Attitudes to life and leisure

- ▶ Participants were significantly more likely to say they enjoy **participating in physical activities** compared to spectators (82% vs 71%)
- ▶ Participants were also more likely to agree that it is important to have a **wide range of activities and experiences available on holiday** (83% vs 73%) and **love weekend escapes** (83% vs 72%).

Consideration

- ▶ Participants who said they will definitely consider a cycling experience on a trip in the next 5 years was significantly higher than spectators (82% vs 67%).

Popular destination

- ▶ One in five (19%) spectators experienced the cycling event in Adelaide, compared 2% for participants. South Australia was more likely to be considered best in Australia for cycling events/spectating compared to participants.

Demographics

- ▶ Spectators were more likely to be 18-24 years of age compared to participants (33% vs 22%).

Attitudes to cycling

- ▶ Spectators were more likely to be less confident cyclists and feel not experienced enough to consider cycling on a trip. They were more likely to agree with statements regarding potential barriers such as time and effort in planning a cycling trip and cycling problems.

	Participants Only Check	Spectators Only Check
I don't feel experienced enough to consider cycling as part of my holiday or trip	29% ↓	43% ↑
Cycling is a great way to experience new places and sights	85%	85%
Cycling is a great activity to do with friends/family while on a holiday or trip	84% ↑	73% ↓
It takes a lot of time and effort to plan a cycling trip	42% ↓	54% ↑
I'm concerned about cycling problems like punctures and breakdowns	42% ↓	57% ↑
I am a confident cyclist	74% ↑	60% ↓
It is difficult to find accommodation I like while on a cycling trip	30%	40%

Q22. To what extent do you agree or disagree with each of the following statements about cycling, or a cycling holiday, getaway, or experience? (AGREE/STRONGLY AGREE ONLY)

Note: **Green** text indicates significantly higher than the total and **red** text indicates significantly lower than the total

Base: Spectators only (n=154)
Participants only (n=279)

Dual engaged differences

- Dual engaged were significantly more likely than those who have participated but not spectated on many aspects of cycling tourism. They were more confident cyclists, yet did not feel experienced enough to consider cycling as part of a trip. Other potential barriers such as perceived time and effort, finding accommodation were also higher for dual engaged. Below are some of the key differences.

Metro vs regional destinations

- Dual engaged were significantly more likely than participants only to travel to metro destinations (90% vs 51%), the reverse holds for regional destinations (9% vs 33%).

Length of trip (day vs night)

- Dual engaged were more likely (but not significantly) than participants only to stay at least one night away (63% vs 55%).

Awareness of Victorian cycling events

- Awareness of all cycling events was significantly higher for dual engaged with the exception of the Round the Bay in day event and the Giant Odyssey Mountain Bike Marathon.

Spectating

- Dual engaged were more likely to enjoy watching cycling on television (40% vs 27%), support friends/family when they participate in cycling events (39% vs 26%), cycle to work regularly (38% vs 18%), look out for rides/events through online cycling communities (25% vs 13%) and belong to a cycling club or association (35% vs 11%)

Base: Dual engaged (n=129)
Participants only (n=279)

Dual engaged differences

- Dual engaged participants differ in their attitudes towards life and leisure a number of measures. Below are the key differences.

Attitudes to life

- Dual engaged were more likely to agree with enjoying adventure type activities but also relaxing activities such as spa treatments or lying on a beach. They also love going back to the same places for short breaks and more food and wine aficionados compared to participants.

	Participants (279)	Participants and Spectators (179)
I love going back to the same places for my short breaks/holidays	12%↓	85%↑
I love fine wine and going to the best restaurants	15%↓	84%↑
My idea of a perfect holiday is lying on a beach or by the pool doing nothing	51%↓	77%↑
I like to pamper myself with spa treatments or massages	58%↓	78%↑
I enjoy thrill seeking and adventure type activities, such as rock climbing	58%↓	82%↑

Attitudes to leisure

- Dual engaged were more invested in competing, following and spectating cycling specific events, whereas participants were more likely to cycle for general benefits such as recreation, health and fitness and being outdoors.

	Participants (279)	Participants and Spectators (179)
Enjoy cycling for recreation	58%↑	48%
Want to do something different	25%	38%↑
Health and fitness	56%↑	39%
To compete or participate	12%	23%↑
I enjoy following cycling events	15%↓	43%↑
To support someone I know	12%↓	28%↑
Social connection with friends/family	30%	33%
I enjoy being outside/out in the open air	54%↑	41%
Sightseeing	45%	35%
Relaxation	45%	49%
A sense of achievement	25%	31%↑
To watch a cycling event/race	11%↓	34%↑

Q35. Attitudes to Leisure - AGREE/STRONGLY AGREE ONLY

Q3. What are the reasons that you participate in cycling experiences or spectate cycling events/races ?

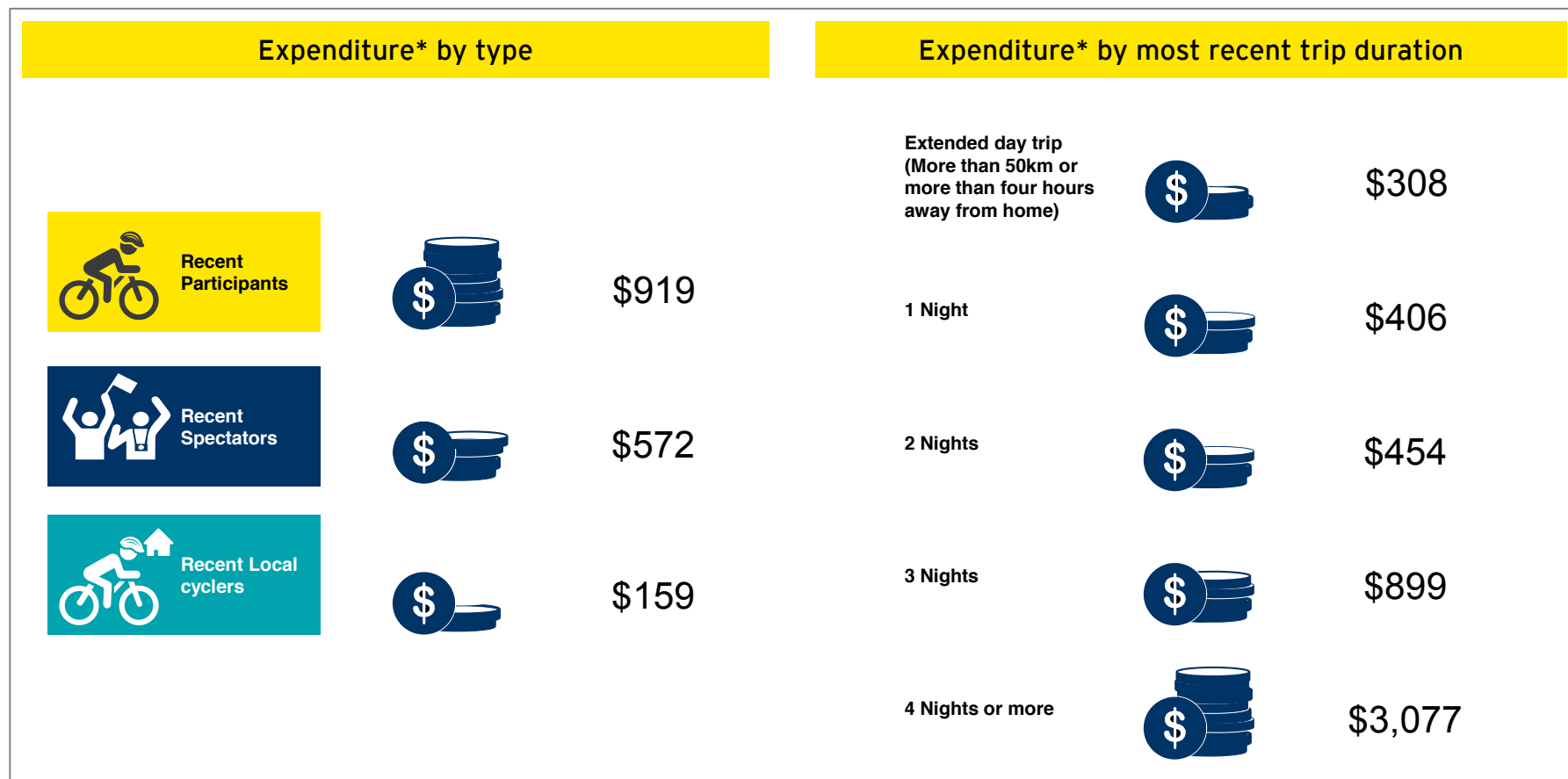
Note: **Green** text indicates significantly higher than the total and **red** text indicates significantly lower than the total

Base: Dual engaged (n=129)

Participants only (n=279)

Expenditure by type and duration

- Participants spent, on average*, \$347 more than spectators and \$760 more than recent local cyclers on their most recent cycling tourism experience. We also found a positive relationship between expenditure and trip duration, with a significantly higher increase once the trip exceeded 3 nights. The data also showed only a marginal increase in the expenditure of a 1 night vs. a 2 night trip. This indicates that there may be economies of scale, or extraneous costs in a 1 night trip that are not necessarily part of a 2 night trip.



Q15a. approximately how much in **total** did you spend on things related to this entire trip, which included the cycling experience?

Base: Participants and Spectators (n=562)

*Trimmed average: Used to reduce potentially skewed results due to outliers. It is computed after removing the highest 5% and lowest 5% of non-missing values

Appendix 3:

Part 2- Recent participants,
spectators and local cyclists



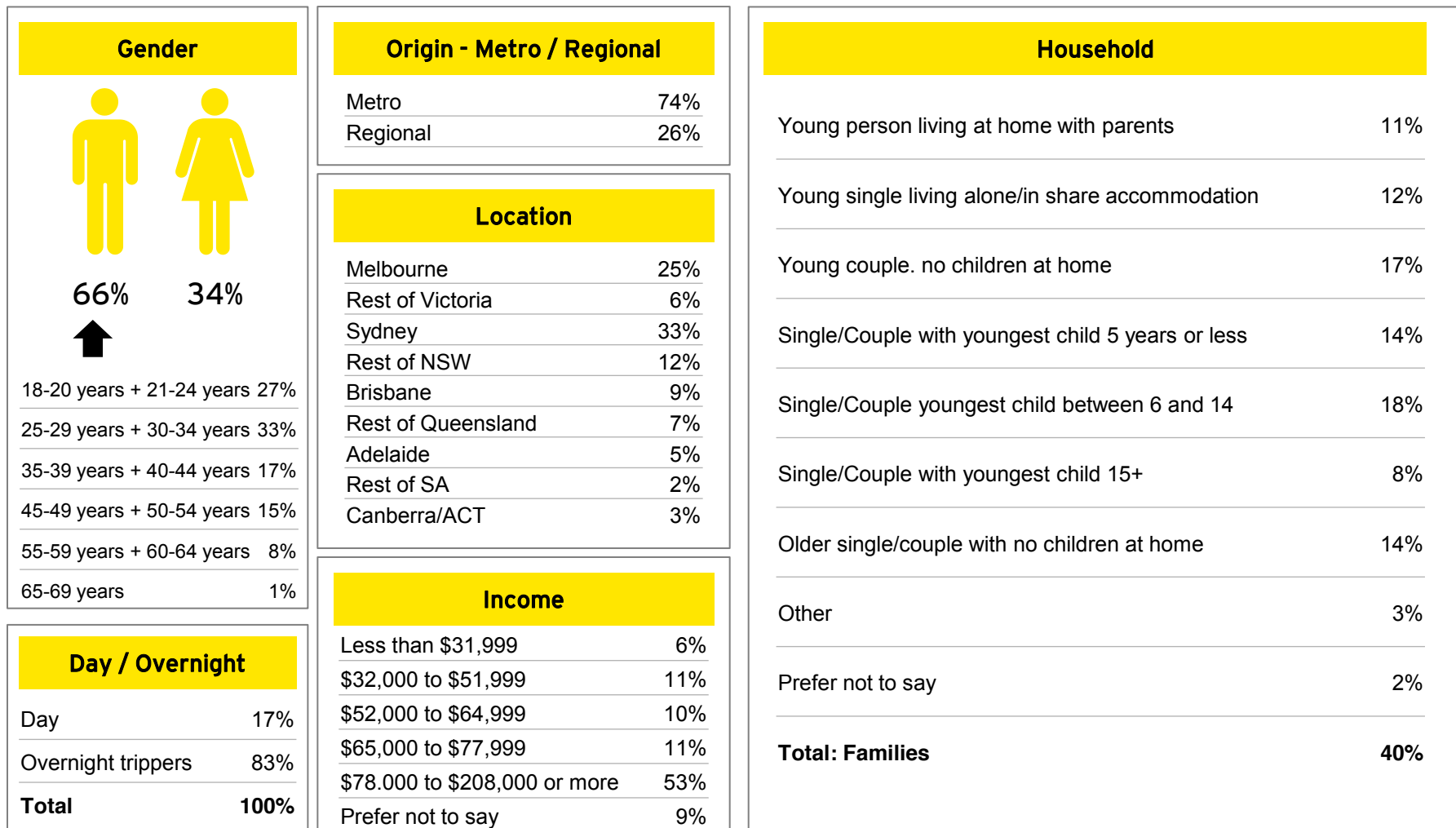
Local cyclists - Most appealing ideas to encourage visiting Victoria

- Similar to recent participants, initiatives that would encourage local cyclists to visit Victoria were extensive cycle paths and trails, downloadable maps of Victorian tracks, trails and facilities and accessible information online. Ideas that appeal to local cyclists more than recent participants were operators or travel agents who can pre-book accommodation, tickets, transfers and bike hire (37%), bicycle storage on trains and at train stations and buses with racks. This suggests that the convenience of organising a cycling experience is more important to local cyclists and they may have more propensity to use public transport for trips involving a cycling experience (as we know they were more likely to own their bike compared to recent participants). A lack of experience in cycling tourism could also be playing a role in these results.

	Recent Participant	Local Cyclists	Total
<i>Base:</i>	340	147	154
Extensive cycle paths and trails	42%	42%	42%
Downloadable maps of Victorian tracks, trails and facilities	42%	41%	41%
Accessible information online	47%	40%	44%
Operators or travel agents who can pre-book accommodation, tickets, transfers and bike hire	31%	37%	32%
Bicycle storage on trains and at train stations	32%	35%	33%
Bike-friendly businesses, such as cafes, restaurants, and accommodation (e.g. offering secure facilities for bikes)	40%	34%	38%
A website that provides comprehensive information about planning a cycle trip in Victoria	42%	34%	39%
Packaged cycle tours that include accommodation, maps and places of interest	37%	34%	35%
Buses with bike racks	24%	31%	27%
Car hire that includes bike racks	33%	28%	30%
Ability to book cycle-related needs (e.g. bike hire) online	35%	28%	32%
Ability to book online travel for your bikes on trains/buses	34%	27%	32%
Bike share schemes around metropolitan Melbourne	33%	26%	31%

Q30. How appealing do you find each of the following ideas? - VERY APPEALING ONLY

Recent participants profile - demographics



- S1. Are you... (male/female)?
 S2. Which of the following age groups do you fall into?
 S3. Where do you currently live?

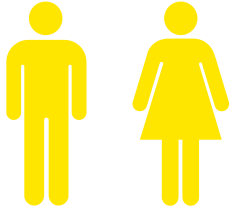
Base: Recent participant (n=369)

Recent participants – intrastate vs. interstate destination

58% Intrastate

31% Interstate

11% Overseas

Gender		
		
	Interstate	Intrastate
<i>Base:</i>	120	217
18-24 years	28%	28%
25-34 years	43%	31%
35-44 years	13%	22%
45-54 years	11%	14%
55-64 years	3%	5%
65-69 years	1%	0%

Household		
	Interstate Destination	Intrastate destination
<i>Base:</i>	120	217
Young person living at home with parents	7%	14%
Young single living alone/in share accommodation	12%	12%
Young couple. no children at home	25%	14%
Single/Couple with youngest child 5 years or less	17%	15%
Single/Couple youngest child between 6 and 14	24%	19%
Single/Couple with youngest child 15+	3%	9%
Older single/couple with no children at home	12%	10%
Other	0%	3%
Prefer not to say	1%	3%
Total: Families	43%	43%

- S1. Are you... (male/female)?
 S2. Which of the following age groups do you fall into?
 S3. Where do you currently live?

Base: Recent participant (n=369)

Role of the cycling experience – overnight/daytrip

- For recent participants who had taken a cycle daytrip, the cycling experience was the main driver for the choice of trip along with the selected destination. This was regardless of whether they were an intrastate or interstate visitor and signified the purpose of the daytrip exclusively for this cycling activity. Unsurprisingly, when it came to overnight holidays/breaks that were longer in duration, cycling was slightly less of a consideration when it came to the decision-making suggesting that there were a number of factors that came into play.

Recent Participants only n=344	Metro destination			
	Intrastate Recent Participants		Interstate Recent Participants	
	Overnight (n=105)	Daytrip (n=25)	Overnight (n=99)	Daytrip (n=24)*
Main reason to go on this trip was to participate in cycling experience	81%	93%*	81%	85%*
Main reason to go to this destination was to participate in cycling experience	82%	85%*	77%	85%*
Cycling experience main reason for trip and choice of destination	79%	85%*	77%	85%*
Recent Participants only n=344	Regional destination			
	Intrastate Recent Participants		Interstate Recent Participants	
	Overnight (n=55)	Daytrip (n=8)	Overnight (n=30)	Daytrip (n=3)*
Main reason to go on this trip was to participate in cycling experience	60%	59%*	40%	NA
Main reason to go to this destination was to participate in cycling experience	57%	78%*	37%	NA
Cycling experience main reason for trip and choice of destination	54%	55%*	37%	NA

Q11a. And when it came to the reason for the holiday, short break or day trip, the **cycling experience** was...

Q11b. Which of the following best describes why you visited [LOCATION – Q5]?

*Note: Results are indicative due to small sample size

Base: Recent Participants excl. Recent Dual Engaged Spectators/Participants (n=344)

Key differences between recent local cyclists and participants

- ▶ Local cyclists were also more likely to prefer cycling along rail trails that have been converted to bike paths (**69% vs 52%**) and ride in a charity or bike event (**27% vs 16%**) if they considered engaging in cycling tourism in the next five years...
 - **61%** of recent participants went to metro destinations, **27%** to regional destinations, **12%** overseas.
 - **68%** local cyclists went to metro destinations, **25%** to a regional destination.
 - **67%** of trips to regional destinations were undertaken by recent participants and **28%** by local cyclists.
 - **63%** of trips to metro destinations were undertaken by recent participants and **30%** by local cyclists
- ▶ The table opposite shows comparisons between recent participants and recent local cyclists on attitudes towards life and leisure. Notably, recent participants were significantly more likely to agree to all five key statements than recent local cyclists, perhaps reflecting their aptitude for cycling tourism.
 - The biggest difference between the two groups was in respect to fine wine and restaurants. Recent participants (68%) were more likely to love fine wine and going to the best restaurants than recent local cyclists (53%).

Attitudes to life and leisure		
	Recent Participants	Recent Local Cyclists
I love outdoor activities in natural environments, such as bushwalking, cycling or fishing	82% ↑	73% ↓
I love fine wine and going to the best restaurants	68% ↑	53% ↓
My idea of a perfect holiday is lying on a beach or by the pool doing nothing	62% ↑	50% ↓
I like to pamper myself with spa treatments or massages	65% ↑	54% ↓
I enjoy thrill seeking and adventure type activities, such as rock climbing	67% ↑	56% ↓
Note: Green arrows indicate significantly higher than the total and red arrows indicate significantly lower than the total.		

Awareness and knowledge of cycling experiences

Awareness and knowledge of cycling experiences



Best state for a cycling experience (by subgroup)

- ▶ The state breakdown of the best places for a cycling experience as part of a holiday, short break or day trip in Australia highlights a bias towards one's own state; suggesting a preference for an experience close to home compared to an interstate trip.
- ▶ Those aged 18-34 were more likely to prefer New South Wales (18%) or Queensland (15%).

Best state/territory for a cycling experience as part of a holiday, short break or day trip											
Location	Gender		Age			Origin					Total (2000)
	Male (1001)	Female (999)	18-34 (631)	35-54 (718)	55-69 (651)	Vic (575)	NSW (757)	QLD (460)	SA (173)	ACT (35)	
Victoria	18%	16%	17%	17%	17%	40% ↑	7% ↓	8% ↓	6% ↓	21%	17%
New South Wales	13%	12%	18% ↑	11%	7% ↓	2% ↓	28% ↑	6% ↓	2% ↓	7%	12%
Queensland	13%	9%	15% ↑	10%	7% ↓	4% ↓	4% ↓	34% ↑	1% ↓	2%	11%
Tasmania	9%	10%	9%	9%	12%	12%	9%	9%	5%	9%	10%
South Australia	10%	9%	9%	9%	9%	5% ↓	7% ↓	3% ↓	52% ↑	13%	9%
ACT	4%	4%	2%	4%	5%	1% ↓	6% ↑	2% ↓	1%	34% ↑	4%
Western Australia	2%	1%	2%	2%	1%	2%	2%	1%	1%	0%	2%
Northern Territory	1%	1%	2%	1%	0%	2%	1%	1%	1%	1%	1%
Don't know	31% ↓	38% ↑	27% ↓	36%	42% ↑	33%	36%	37%	30%	15%	34%

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)

Note: Green text indicates significantly higher than the total and red text indicates significantly lower than the total

Best state for a cycling experience (by subgroup)

- Overall, the cycling experience destination of the last two years also reveals a bias towards the destinations they have been to when asked what is the best place for a cycling experience as part of a holiday, short break or day trip in Australia.
- However, those who had been to Sydney and regional NSW in the last two years were significantly more likely to think that Tasmania was the best destination and less likely to think that Brisbane or regional Victoria the best.

Best state/territory for a cycling experience as part of a holiday, short break or day trip

Location	Destination in last 2 years																		Total (2000)
	Melb (153)	Regional Victoria (71)	Sydney (150)	Regional NSW (71)	Brisbane (83)	Gold Coast (65)	Regional Qld (56)	Adelaide (60)	Regional SA (32)	Canberra (56)	Regional ACT (18)*	Perth (58)	Regional WA (26)*	Hobart (24)*	Regional Tasmania (14)*	Darwin (13)*	Regional NT (7)*	Overseas (57)	
Victoria	39% ↑	50% ↑	18%	10%	19%	18%	15%	29%	15%	25%	25%	25%	3%↓	32%	12%	28%	0%	23%	17%
New South Wales	6%	8%	6%	5%	8%	10%	8%	11%	9%	6%	15%	7%	10%	19%	6%	6%	35% ↑	6%	12%
Queensland	14%	5%	11%	11%	36% ↑	33% ↑	19%	7%	11%	23%	0%	15%	13%	23%	24%	32%	0%	14%	11%
Tasmania	18%	11% ↓	42% ↑	51% ↑	10% ↓	15%	16%	15%	10%	18%	16%	22%	30%	17%	31%	12%	10%	13%	10%
South Australia	5%	10%	7%	3%	6%	3%	10%	27% ↑	24% ↑	7%	15%	9%	22%	5%	8%	0%	0%	1%	9%
ACT	3%	1%	5%	7%	3%	6%	2%	4%	0%	5%	0%	1%	3%	0%	11%	0%	15%	6%	4%
Western Australia	8%	5%	8%	2%	11%	3%	10%	3%	13%	9%	14%	16% ↑	12%	4%	0%	22%	0%	2%	2%
Northern Territory	3%	3%	3%	3%	1%	5%	3%	3%	7%	6%↑	16% ↑	3%	3%	0%	0%	0%	21% ↑	1%	1%
Don't know	3%↓	6%	1%↓	8%	5%	7%	17%	2%	13%	0%	0%	1%↓	4%	0%	9%	0%	20%	33% ↑	34%

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: Participants from Q2a (n=408)

Note: **Green** text indicates significantly higher than the total and **red** text indicates significantly lower than the total

*Indicative only due to small base size

Which state is best for...? CE vs non CE

- Those with cycling experience over the last two years were a lot more confident in giving an opinion on which state or territory they thought is best when it came to facilities and accommodation, natural scenery, variety of choice of cycling tours and quality of cycling tracks and trails. There was also a slight preference exhibited by this group towards Victoria as being a leading state across all of the four cycling factors.

	Facilities and accommodation		Natural scenery		Variety of choice of cycling tours and options		Quality of cycling tracks and trails	
	CE (562)	Non CE (1,090)	CE (562)	Non CE (1,090)	CE (562)	Non CE (1,090)	CE (562)	Non CE (1,090)
Victoria	24%↑	19%↓	21%↑	12%↓	23%↑	16%↓	26%↑	15%↓
New South Wales	22%	20%	15%↑	8%↓	19%↑	9%↓	20%↑	10%↓
Queensland	15%	16%	16%	14%	12%↑	7%↓	11%↑	7%↓
South Australia	7%↑	4%↓	9%	6%	11%	8%	8%	6%
Western Australia	4%↑	1%↓	5%	4%	4%↑	1%↓	4%↑	1%↓
Tasmania	6%	4%	17%↓	27%↑	8%	6%	4%	6%
Northern Territory	3%↑	1%↓	4%	5%	4%↑	1%↓	5%↑	1%↓
ACT	5%↑	2%↓	3%↑	1%↓	4%↑	2%↓	5%	4%
Don't know	13%↓	34%↑	10%	23%↑	16%	49%↑	16%↓	50%↑

Q20. Which state or territory do you think is best when it comes to...?

Note: **Green** text indicates significantly higher than the total and **red** text indicates significantly lower than the total

Base: CE (n=562)

Non CE (n=1,090)

Which state is best for...? Intrastate vs interstate

- When it came to those who had travelled to an interstate destination in the last two years, Victoria, New South Wales and Queensland were the states that resonated the most when it came to the four cycling factors, especially when it came to the facilities and accommodation and natural scenery. Queensland was less thought to be a destination offering a variety of cycling tours or options along with having quality cycling tracks and trails when compared to Victoria and New South Wales.

	Facilities and accommodation		Natural scenery		Variety of choice of cycling tours and options		Quality of cycling tracks and trails	
	Destination							
	Intra (307)	Inter (216)	Intra (307)	Inter (216)	Intra (307)	Inter (216)	Intra (307)	Inter (216)
Victoria	23%	18%	24%	20%	24%	19%	26%	23%
New South Wales	25%	22%	19%	17%	21%	17%	25%	21%
Queensland	16%	20%	16%	20%	11%	14%	11%	13%
South Australia	6%	8%	6%	6%	8%	10%	6%	6%
Western Australia	5%	5%	7%	7%	4%	7%	5%	6%
Tasmania	6%	6%	15%	12%	11%	10%	3%	4%
Northern Territory	4%	4%	3%	5%	6%	6%	7%	7%
ACT	5%	8%	4%	5%	4%	5%	6%	6%
Don't know	10%	10%	6%	8%	10%	11%	11%	13%

Q20. Which state or territory do you think is best when it comes to...?

Base: Intrastate last 2 years (n=307)
Interstate last 2 years (n=216)

Which state is best for...? Metro vs. regional origin

- When it came to those who had travelled to an interstate destination in the last two years, Victoria, New South Wales and Queensland were the states that resonated the most when it came to the four cycling factors, especially when it came to the facilities and accommodation and natural scenery. Queensland was less thought to be a destination offering a variety of cycling tours or options along with having quality cycling tracks and trails when compared to Victoria and New South Wales.

	Facilities and accommodation		Natural scenery		Variety of choice of cycling tours and options		Quality of cycling tracks and trails	
	Origin							
	Regional (120)	Metro (392)	Regional (120)	Metro (392)	Regional (120)	Metro (392)	Regional (120)	Metro (392)
Victoria	28%	21%	19%	16%	26%	16%	23%	20%
New South Wales	22%	24%	19%	24%	22%	22%	27%	24%
Queensland	14%	16%	17%	14%	8%	13%	12%	11%
South Australia	5%	7%	21%	13%	6%	9%	3%	5%
Western Australia	5%	9%	6%	11%	6%	14%	5%	9%
Tasmania	3%	5%	2%	3%	4%	4%	6%	6%
Northern Territory	1%	5%	4%	6%	2%	6%	1%	6%
ACT	2%	4%	3%	5%	1%	6%	2%	7%
Don't know	21%	8%	10%	8%	25%	10%	21%	11%

Q20. Which state or territory do you think is best when it comes to...?

Base: Intrastate last 2 years (n=307)
Interstate last 2 years (n=216)

Attitudes to cycling by subgroups

- ▶ Comparing the three sub groups on their attitudes to cycling, the barriers to taking a cycling trip stem from uncertainty regarding logistics (time and effort involved in planning a trip, concern about punctures and breakdowns and finding accommodation) along with a general lack of confidence (which was higher for dual engaged than either of the other two groups).
- ▶ This is despite the fact that almost nine in ten of dual engaged agreed that they were confident cyclists compared to participants and spectators however for some, this is a barrier.
- ▶ More details on the differences between participants, spectators and dual engaged who took part in a cycling experience within the last two years are located in the appendix.

Attitudes to cycling	In last two years			
	Cycling Tourists	Participants	Spectators	Dual engaged
<i>Base:</i>	562	279	154	129
Cycling is a great way to experience new places and sights	85%	85%	85%	86%
Cycling is a great activity to do with friends/family while on a holiday or trip	80%	84%↑	73%↓	79%
I am a confident cyclist	73%	74%↓	60%↓	91%↑
I'm concerned about cycling problems like punctures and breakdowns	52%	42%↓	57%↓	74%↑
It takes a lot of time and effort to plan a cycling trip	51%	42%↓	54%↓	76%↑
It is difficult to find accommodation I like while on a cycling trip	40%	30%↓	40%↓	69%↑
I don't feel experienced enough to consider cycling as part of my holiday or trip	39%	29%↓	43%↓	63%↑

Q22. To what extent do you agree or disagree with each of the following statements about cycling, or a cycling holiday, getaway, or experience? (AGREE/STRONGLY AGREE ONLY)

Note: **Green** arrow indicates significantly higher than the total and **red** arrow indicates significantly lower than the total

Base: Participants, Spectators and Dual Engaged (n=562)

Attitudes to cycling tourism - by destination (last 2 years)

- Those who had been to metro areas were significantly more likely to agree that it takes a lot of time and effort to plan a cycling trip, be concerned about cycling problems like punctures and breakdowns and find that it is difficult to find accommodation they like while on a cycling trip. Interestingly, these attitudes that can potentially impact future engagement with cycling tourism were not shared by those who went to overseas destinations.
- However, they were more likely to agree that they were a confident cyclist compared to those who visited regional locations.

	Destination in the last 2 years											
	Melb	Reg Vic	Sydney	Reg NSW	Bris	Gold Coast	Reg Qld	Adel	Reg SA	Can	Perth	Over-seas
<i>Base:</i>	153	71	150	71	83	65	56	60	32	56	58	57
I don't feel experienced enough to consider cycling as part of my holiday or trip	52% ↑	40%	51% ↑	35%	51% ↑	37%	40%	50%	49%	44%	48%	13% ↓
Cycling is a great way to experience new places and sights	91%	89%	83%	84%	91%	91%	98% ↑	91%	78%	94%	95%	90%
Cycling is a great activity to do with friends/family while on a holiday or trip	83%	83%	83%	75%	81%	84%	79%	83%	69%	81%	87%	88%
It takes a lot of time and effort to plan a cycling trip	67% ↑	49%	69% ↑	49%	65% ↑	56%	44%	78% ↑	61%	79% ↑	73% ↑	31% ↓
I'm concerned about cycling problems like punctures and breakdowns	68% ↑	46%	63% ↑	48%	71% ↑	39%	44%	73% ↑	71%	65%	75% ↑	28% ↓
I am a confident cyclist	87% ↑	84%	92% ↑	75%	89% ↑	87%	81%	95% ↑	73%	91%	91%	60% ↓
It is difficult to find accommodation I like while on a cycling trip	58% ↑	39%	54% ↑	27%	60% ↑	34%	47%	69% ↑	53%	58% ↑	61% ↑	8% ↓

Q21/22. To what extent do you agree or disagree with each of the following statements about cycling, or a cycling holiday, getaway, or experience? (AGREE/STRONGLY AGREE ONLY)

Base: Participants (n=408)

Note: **Green** arrow indicates significantly higher than the total and **red** arrow indicates significantly lower than the total

Attitudes to cycling and cycling tourism

- ▶ Those who hadn't had a cycling experience as part of a holiday in the last two years were more likely to agree that they don't feel experienced enough to consider cycling as part of their holiday or trip, or that cycling is a great way to experience new places and sights and a social activity with friends/family.
- ▶ Only one in five non CE surveyed agreed that they were a confident cyclist.
- ▶ However, they were significantly less likely than CE to have negative perceptions relating to accommodation, cycling problems and time and effort involved with cycling, presumably due to the lack of general knowledge that they may hold when it comes to planning a cycling trip.

	CE	Non CE	Total
<i>Base:</i>	562	1090	1652
I don't feel experienced enough to consider cycling as part of my holiday or trip	39%↓	54%↑	51%
Cycling is a great way to experience new places and sights	85%↑	51%↓	57%
Cycling is a great activity to do with friends/family while on a holiday or trip	80%↑	47%↓	53%
It takes a lot of time and effort to plan a cycling trip	51%↑	44%↓	46%
I'm concerned about cycling problems like punctures and breakdowns	52%↑	40%↓	42%
I am a confident cyclist	73%↑	21%↓	30%
It is difficult to find accommodation I like while on a cycling trip	40%↑	12%↓	17%

Q22. To what extent do you agree or disagree with each of the following statements about cycling, or a cycling holiday, getaway, or experience? (AGREE/STRONGLY AGREE ONLY)

Note: **Green** text indicates significantly higher than the total and **red** text indicates significantly lower than the total

Base: CE (n=562)
Non CE (n=1,090)

Considered activities for a cycling experience

- The most common activities considered were all easy, slow paced pursuits. They relate to accessibility and infrastructure, with the top two most common responses including dedicated cycling paths along foreshores, rivers, lakes, or rail trails.

		Metro destination 32%↓	Part	Spec	Non CE
Cycling on cycle path routes along a foreshore, river or lake	<div></div> 59%		50%↓	32%↓	64%↑
Cycling along rail trails that have been converted to bike paths	<div></div> 57%		59%	52%	56%
Sightseeing around the city/town	<div></div> 55%		57%	47%	55%
Metro destination 26%↓A historical or heritage bike ride	<div></div> 41%		35%	25%↓	45%↑
A food and wine cycle tour	<div></div> 37%		34%	34%	39%
A day trip along metropolitan cycle paths	<div></div> 32%		34%	30%	31%
A cycle tour where you camp or stay overnight along the way	<div></div> 26%	Metro destination 38%↑	26%	22%	27%
Mountain biking on fire trails or off-road	<div></div> 25%		40%↑	33%↑	20%↓
A local cycling tour of your hometown or city	<div></div> 22%		25%	22%	22%
Watching a cycle race or bike event	<div></div> 20%		14%↓	31%↑	20%
Cross country cycling in alpine areas	<div></div> 17%	Metro destination 31%↑	20%	16%	17%
Riding in a charity or bike event	<div></div> 16%		33%↑	25%↑	12%↓
A challenging road bike route through hills, mountains, or scenic countryside	<div></div> 13%		23%↑	18%	11%↓
Mountain biking in dedicated areas	<div></div> 11%		14%	7%	11%
Competing in a cycle race	<div></div> 4%		9%↑	11%↑	2%↓

Q25. If you were to go on a holiday, short break or day trip that included a cycling experience, which of the following activities would you consider?

Note: **Green** text/arrow indicates significantly higher than the total and **red** text/arrow indicates significantly lower than the total

Base: Considerers - Q24, Code 1 or 3, (n=1,006), Participants (n=383), Spectators (n=256), Non CE (n=489)

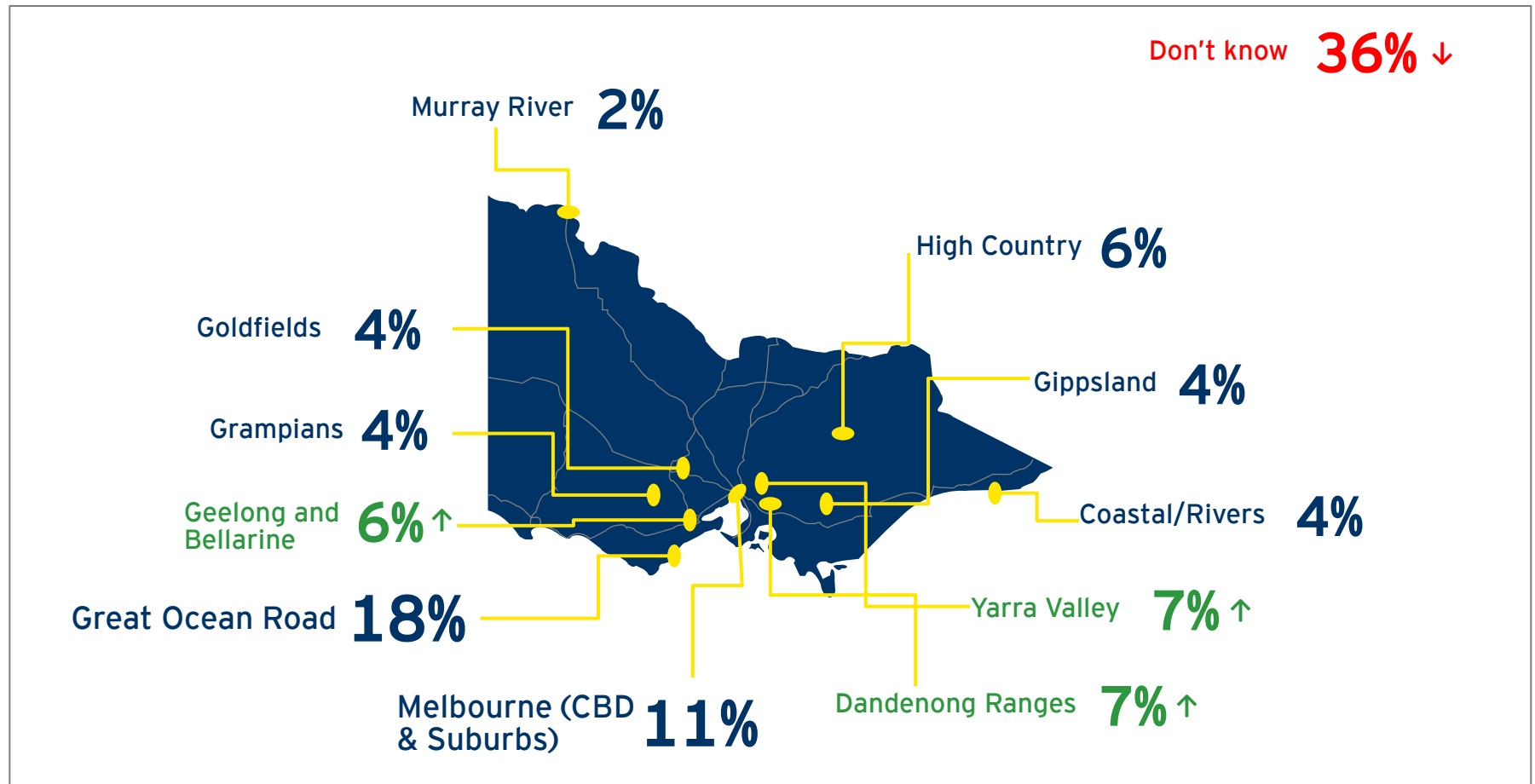
Appendix 5:

Awareness and knowledge of
cycling experiences- Victoria



Best cycling destinations in Victoria - unprompted (Vic only)

- When we analyse where **Victorians** believe the best cycling destinations in Victoria were, we not only found that more of them have an opinion, but that Yarra Valley, Dandenong Ranges, and Geelong were destinations viewed more positively.



Q29b. What parts of Victoria can you think of which offer good cycling experiences? (OE)

Base: Victorians who would consider a cycling experience in the next five years (n=344)

Best cycling areas within Victoria - unprompted

- Half of those surveyed were unable to offer an opinion on where the best cycling areas with Victoria were. The two most commonly mentioned areas were Melbourne (CBD and suburbs) (9%) and the Great Ocean Road (15%).

Column %	Origin									
	Melbourne	Rest of Victoria	Sydney	Rest of NSW	Brisbane	Rest of Queensland	Adelaide	Rest of SA	Canberra/AC T	NET
NET	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
No idea/dont know	36%	36%	59%	52%	64%	56%	66%	64%	29%	51%
Great Ocean Road	17%	23%	10%	8%	13%	22%	6%	20%	24%	15%
Melbourne (CBD and suburbs)	9%	2%	11%	13%	9%	7%	8%	1%	15%	9%
Other regional VIC	8%	18%	5%	2%	4%	6%	3%	4%	6%	6%
Countryside/rural	3%	5%	3%	5%	3%	5%	7%	3%	1%	4%
Gippsland	5%	2%	2%	5%	2%	5%	0%	0%	17%	4%
High Country	6%	4%	2%	1%	4%	0%	3%	0%	18%	3%
Dandenong Ranges	8%	1%	2%	2%	3%	1%	0%	0%	1%	3%
Coastal/ rivers	4%	3%	1%	4%	3%	4%	1%	0%	0%	3%
Goldfields	2%	10%	3%	1%	2%	2%	1%	0%	0%	3%
Melbourne foreshore/bayside	6%	0%	2%	0%	3%	1%	1%	0%	5%	3%
Yarra Valley	7%	5%	1%	0%	0%	1%	0%	1%	0%	3%
Geelong/Bellarine Peninsula	5%	10%	1%	0%	1%	1%	0%	0%	0%	3%
The Murray	1%	3%	2%	5%	0%	4%	2%	6%	0%	2%
Mornington Peninsula	6%	1%	1%	0%	1%	1%	0%	0%	0%	2%
Grampians	5%	2%	1%	0%	4%	0%	1%	0%	0%	2%
Mountain/alpine regions	2%	1%	2%	1%	4%	0%	2%	1%	0%	2%
Yarra River	4%	0%	1%	0%	1%	0%	0%	0%	0%	1%
Wineries	2%	0%	2%	2%	1%	0%	0%	0%	0%	1%
Parks/State forests	1%	0%	0%	3%	1%	1%	2%	0%	0%	1%
Rail trails	1%	0%	1%	2%	0%	1%	0%	0%	2%	1%
Phillip Island	0%	0%	0%	1%	2%	1%	1%	0%	0%	1%
Inner city	0%	0%	1%	0%	1%	0%	0%	0%	0%	1%
St Kilda	0%	0%	1%	1%	2%	0%	0%	0%	0%	1%
Outside of VIC	0%	2%	0%	0%	1%	0%	2%	4%	2%	1%
DMR	1%	3%	0%	0%	0%	0%	0%	0%	0%	0%
Roads	0%	0%	0%	0%	0%	1%	0%	0%	0%	0%
Bush	0%	0%	0%	1%	0%	0%	0%	0%	0%	0%
Column n	271	73	333	94	152	101	68	25	22	1139

Q29B. What parts of Victoria can you think of which offer good cycling experiences?

Base: Considerers (n=1,139)

Best cycling areas within Victoria - unprompted

- Around three in five participants (57%) in the last two years did not know what parts of Victoria offer good cycling experiences. Specific environments such as coastal/rivers, high country, rural, wineries, alpine regions were often mentioned without any specific place name, highlighting a lack of knowledge of specific Victorian destinations that stand out for good cycling experiences.

	Overall Total	Participation Destinations in Last 2 Years				
		Total VIC	Total NSW	Total QLD	Total SA	Total
<i>Base</i>	<i>1,139</i>	<i>178</i>	<i>187</i>	<i>123</i>	<i>81</i>	<i>382</i>
Melbourne (CBD and suburbs)	9%	8%	10%	9%	7%	11%
Great Ocean Road	15%	10%	7%	7%	3%	10%
High Country	3%	6%	5%	1%	0%	4%
Other regional VIC	6%	5%	5%	2%	3%	4%
Coastal/ rivers	3%	4%	2%	5%	0%	3%
Dandenong Ranges	3%	4%	1%	4%	0%	3%
Countryside/rural	4%	2%	3%	1%	2%	2%
Mornington Peninsula	2%	4%	0%	1%	0%	2%
Melbourne foreshore/bayside	3%	2%	2%	3%	5%	2%
Wineries	1%	1%	2%	1%	0%	2%
Mountain/alpine regions	2%	3%	3%	2%	1%	2%
Goldfields	3%	1%	3%	1%	0%	2%
Gippsland	4%	2%	1%	1%	0%	2%
No idea/don't know	51%	58%	61%	68%	72%	57%

Q29b. What parts of Victoria can you think of which offer good cycling experiences? (OE)

Base: Total sample - all those who answered this open-ended question (1,139)
Participants from the last 2 years (n=382)

Best cycling areas within Victoria - unprompted

- ▶ The Great Ocean Road was the most commonly cited best Victorian cycling area among Victorians and non Victorians alike (18% vs. 13%).
- ▶ Victorians were significantly more likely than non Victorians to mention areas in close proximity to Melbourne- Dandenong Ranges (7% vs. 2%) and the Yarra Valley (7% vs. 1%).

Overall		Origin			
		Melbourne	Rest of Vic	Total Vic	Total non Vic
<i>Base</i>		271	73	344	795
Great Ocean Road	<div></div> 15%	17%	23%	18%	13%
Melbourne (CBD and suburbs)	<div></div> 9%	9%	2%	8%	10%
Other regional VIC	<div></div> 6%	8%	18%↑	10%	5%
Countryside/rural	<div></div> 4%	3%	5%	4%	4%
Gippsland	<div></div> 4%	5%	2%	4%	3%
High Country	<div></div> 3%	6%	4%	6%	2%
Dandenong Ranges	<div></div> 3%	8%↑	1%	7%↑	2%↓
Coastal/ rivers	<div></div> 3%	4%	3%	4%	3%
Goldfields	<div></div> 3%	2%	10%↑	4%	2%
Melbourne foreshore/bayside	<div></div> 3%	6%↑	0%	5%	2%
Yarra Valley	<div></div> 3%	7%↑	5%	7%↑	1%↓
Geelong/Bellarine Peninsula	<div></div> 3%	5%	10%↑	6%↑	1%↓
No idea/don't know	<div></div> 51%	36%↓	36%	36%↓	58%

Q29b. What parts of Victoria can you think of which offer good cycling experiences? (OE)

Base: Considerers (n=1,139)

Note: **Green** text indicates significantly higher than the total and **red** text indicates significantly lower than the total

Most appealing ideas to encourage visiting Victoria

- Three of the top four ideas that would encourage visitation relate to information about the cycling experience: downloadable maps or tracks, trails and facilities (39%), accessible information online (38%) and a website that provides comprehensive information about planning a cycle trip in Victoria (37%).

Potential Ideas	Overall	Participants	Spectators	Non-CE
Downloadable maps of Victorian tracks, trails and facilities	38%	44%	38%	38%
Accessible information online	37%	47%↑	39%	36%↓
Extensive cycle paths and trails	37%	42%	39%	37%
A website that provides comprehensive information about planning a cycle trip in Victoria	36%	40%	41%	36%
Packaged cycle tours that include accommodation, maps and places of interest	31%	38%↑	34%	30%
Bike-friendly businesses, such as cafes, restaurants, and accommodation	31%	39%↑	38%	30%↓
Ability to book cycle-related needs online	26%	32%↑	33%↑	22%↓
Operators or travel agents who can pre-book accommodation, tickets, transfers and bike hire	26%	35%↑	29%	22%↓
Bicycle storage on trains and at train stations	25%	35%↑	33%↑	22%↓
Ability to book online travel for your bikes on trains/buses	25%	33%↑	35%↑	22%↓
Car hire that includes bike racks	22%	30%↑	35%↑	19%↓
Buses with bike racks	20%	26%↑	31%↑	15%↓
Bike share schemes around metropolitan Melbourne	19%	33%↑	33%↑	13%↓

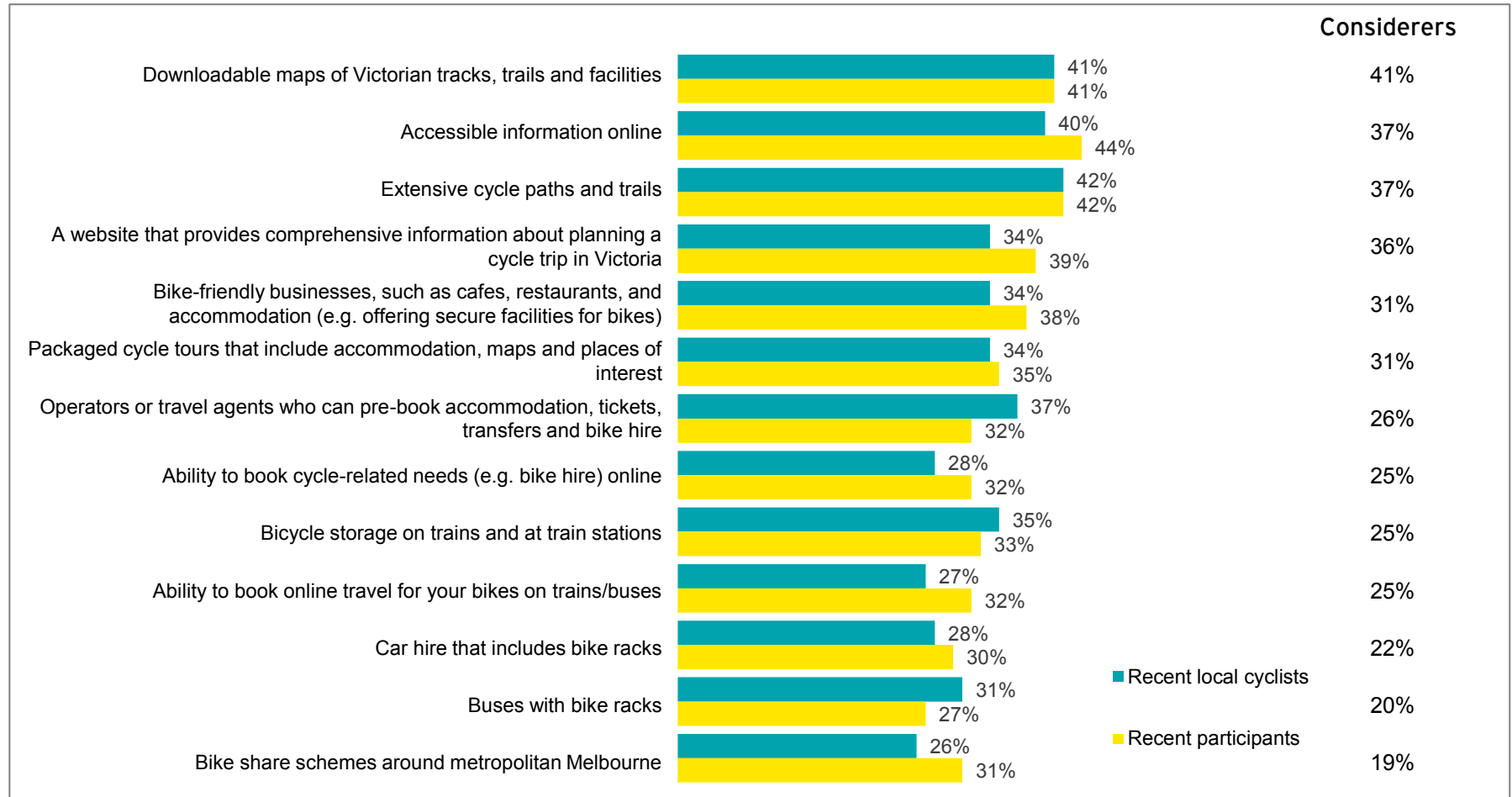
Q30. How appealing do you find each of the following ideas? - VERY APPEALING ONLY

Note: **Green** text/arrow indicates significantly higher than the total and **red** text/arrow indicates significantly lower than the total

Base: Considerers (n=1,139), Participant Considerers (n=382), Spectator Considerers (n=256), Non-CE (n=489)

Most appealing ideas to encourage visiting Victoria

- Around four in ten recent local cyclists and recent participants found downloadable maps, accessible information online and extensive cycle paths and trails appealing.

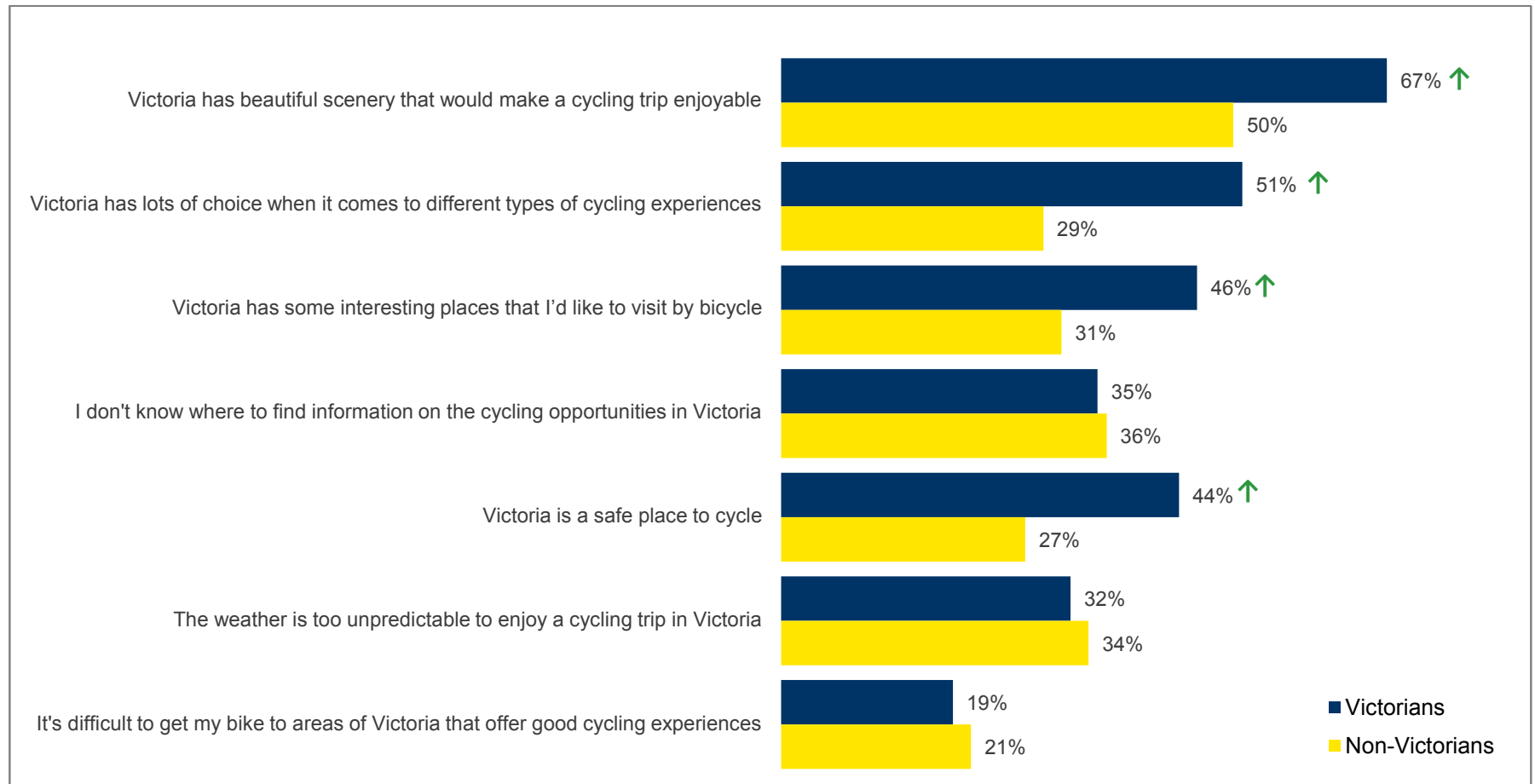


Q30. How appealing do you find each of the following ideas? - VERY APPEALING ONLY

Base: Recent local cyclists(n=147)
Recent participants (n=340)
Considerers of Victoria as a cycling destination next 5 years (n=1,139)

Attitudes to Victoria as a destination for cycling tourism

- When comparing attitudes to Victoria based on state of origin, Victorians were more positive on most dimensions, highlighting the intrastate opportunity. However, bike access and a lack of information were ubiquitous issues.



Q23. To what extent do you agree or disagree with each of the following statements about **Victoria** as a destination for a cycling holiday, getaway, or experience?(AGREE/STRONGLY AGREE ONLY)

Note: **Green** text/arrow indicates significantly higher than the total and **red** text/arrow indicates significantly lower than the total

Base: Those who would consider a cycling experience in the next five years from Victoria (n=575), NSW, QLD, and SA (n=1,425)

Attitudes to Victoria as a destination for cycling tourism

- Over half (55%) of those surveyed believed that Victoria has beautiful scenery that would make a cycling trip enjoyable. Males were more positive than females towards Victoria as a destination for cycling tourism across most statements, while those from the ACT (albeit a small sample) also exhibited a high preference towards the state.

	Overall				Origin				
					VIC	NSW	QLD	SA	ACT
Victoria has beautiful scenery that would make a cycling trip enjoyable	<div></div>	55%			67% ↑	51%	49% ↓	38% ↓	78%
I don't know where to find information on the cycling opportunities in Victoria	<div></div>	36%			35%	39%	35%	33%	34%
Victoria has some interesting places that I'd like to visit by bicycle	<div></div>	36%	Male Female	40% ↑ 32% ↓	46% ↑	34%	28% ↓	24% ↓	50%
Victoria has lots of choice when it comes to different types of cycling experiences	<div></div>	35%	Male Female	39% ↑ 32% ↓	51% ↑	30% ↓	28% ↓	18% ↓	51%
The weather is too unpredictable to enjoy a cycling trip in Victoria	<div></div>	33%			44% ↑	31%	23% ↓	16% ↓	34%
Victoria is a safe place to cycle	<div></div>	32%	Male Female	35% ↑ 29% ↓	32%	35%	33%	31%	39%
It's difficult to get my bike to areas of Victoria that offer good cycling experiences	<div></div>	20%	Male Female	25% ↑ 17% ↓	19%	22%	20%	18%	29%

Q23. To what extent do you agree or disagree with each of the following statements about **Victoria** as a destination for a cycling holiday, getaway, or experience?(AGREE/STRONGLY AGREE ONLY)

Note: Green text indicates significantly higher than the total and red text indicates significantly lower than the total

Base: Total sample (n=2,000)

Attitudes to Victoria as a destination for cycling tourism

	Origin		Experience		Participation Destinations in Last 2 Years												
	MET	REG	CE	Non CE	Melb	Reg Vic	Syd	Reg NSW	Bris	Gold Coast	Reg Qld	Adel	Reg SA	Can	Reg ACT	Perth	Over-seas
Base	1449	551	562	1090	153	71	150	71	83	65	56	60	32	56	18	58	57
Victoria has beautiful scenery that would make a cycling trip enjoyable	57%	50%	76% ↑	56% ↓	83%	85%	79%	70%	81%	79%	86%	84%	64%	81%	91%	82%	74%
Victoria has lots of choice when it comes to different types of cycling experiences	37%	32%	63% ↑	34% ↓	83% ↑	83% ↑	75%	52%	76%	68%	60%	82% ↑	59%	79%	84%	77%	51%
Victoria has some interesting places that I'd like to visit by bicycle	37%	32%	72% ↑	33% ↓	85% ↑	86%	81%	71%	86%	76%	72%	89% ↑	76%	82%	76%	86%	66%
I don't know where to find information on the cycling opportunities in Victoria	37%	34%	38%	37% ↓	52% ↑	34%	55% ↑	35%	49%	26%	45%	49%	46%	48%	80% ↑	49%	24%
Victoria is a safe place to cycle	34%	28%	67% ↑	28% ↓	83% ↑	84%	80% ↑	61%	74%	69%	72%	84%	61%	81%	80%	76%	59%
The weather is too unpredictable to enjoy a cycling trip in Victoria	35%	30%	48% ↑	33% ↓	67% ↑	36%	62% ↑	40%	65% ↑	52%	56%	70% ↑	66%	64%	85%	72% ↑	44%
It's difficult to get my bike to areas of Victoria that offer good cycling experiences	21%	18%	42% ↑	17% ↓	59% ↑	39%	57% ↑	36%	64% ↑	51%	45%	63% ↑	51%	62% ↑	76%	65% ↑	18% ↓

Q23. To what extent do you agree or disagree with each of the following statements about **Victoria** as a destination for a cycling holiday, getaway, or experience?(AGREE/STRONGLY AGREE ONLY)

Base: Participants (n=408)

Note: **Green** text indicates significantly higher than the total and **red** text indicates significantly lower than the total

Awareness of Victorian cycling events - Prompted

Origin	Melbourne	Rest of Victoria	Sydney	Rest of NSW	Brisbane	Rest of Queensland	Adelaide	Rest of SA	Canberra/ACT	Total
Base:	448	127	560	197	277	183	129	44	35	2000
Cadel Evans Great Ocean Road Race	44% ↑	44% ↑	22% ↓	24%	20% ↓	26%	27%	15%	48%	30%
Great Victorian Bike Ride	47% ↑	54% ↑	14% ↓	6% ↓	11% ↓	13% ↓	10% ↓	7% ↓	30%	23%
Jayco Herald Sun Tour	28% ↑	42% ↑	10% ↓	10% ↓	8% ↓	8% ↓	10%	13%	7%	16%
Round the Bay in a Day	37% ↑	31% ↑	7% ↓	3% ↓	7% ↓	3% ↓	5% ↓	10%	14%	14%
Cycling Australia National Road Championships	10%	18% ↑	12%	4% ↓	8%	9%	7%	9%	8%	10%
Mt Buller MTB Festival	8% ↑	5%	5%	3%	3%	4%	5%	1%	13%	5%
Cycle Salute	3%	2%	3%	1%	2%	1%	3%	1%	0%	2%
Giant Odyssey Mountain Bike Marathon	3% ↑	3%	2%	0% ↓	3%	0% ↓	1%	0%	4%	2%
None of the above	30% ↓	26% ↓	64% ↑	67% ↑	68% ↑	65% ↑	57%	70%	33%	54%

Q31. Have you heard of any of the following Victorian cycling events?

Base: Total Sample (n=2,000)

Note: Green text indicates significantly higher than the total and red text indicates significantly lower than the total

Events considered as a participant

	CE (562)	Non CE (1,090)
Total	100%	100%
Jayco Herald Sun World Tour	29% ↑	1% ↓
Round the Bay in a Day	25% ↑	4% ↓
Great Victorian Bike Ride	24% ↑	4% ↓
Cadel Evans Great Ocean Road Race	23% ↑	2% ↓
Mt Buller MTB Festival	22% ↑	1% ↓
Cycle Salute	16% ↑	1% ↓
Giant Odyssey Mountain Bike Marathon	14% ↑	1% ↓
Cycling Australia National Road Championships	12% ↑	1% ↓
None of the above	42% ↓	92% ↑

Q32a. Would you consider visiting any of these events as a participant?

Note: **Green** text indicates significantly higher than the total and **red** text indicates significantly lower than the total

Base: CE (n=562),

Non CE (n=1,090)

Events considered as a participant

	Melbourne (408)	Rest of Victoria (127)	Sydney (560)	Rest of NSW (197)	Brisbane (277)	Rest of Qld (183)	Adelaide (129)	Rest of SA (44)	Canberra/ ACT (35)	Total (2000)
Total	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Jayco Herald Sun World Tour	6%	4%	10% ↑	5%	8%	7%	2% ↓	3%	7%	7%
Round the Bay in a Day	8%	7%	11% ↑	7%	6%	5%	1% ↓	4%	2%	7%
Great Victorian Bike Ride	9%	11%	9%	6%	5%	3%	6%	7%	20%	7%
Cadel Evans Great Ocean Road Race	6%	9%	7%	5%	5%	5%	2%	6%	3%	6%
Mt Buller MTB Festival	6%	5%	7%	4%	4%	4%	1% ↓	5%	2%	5%
Cycle Salute	3%	4%	5%	4%	2%	4%	1%	3%	1%	4%
Giant Odyssey Mountain Bike Marathon	3%	1%	4%	4%	4%	2%	1% ↓	3%	4%	3%
Cycling Australia National Road Championships	3%	1%	4% ↑	3%	4%	1%	2%	3%	0%	3%
None of the above	83%	83%	79% ↓	87%	85%	87%	92%	90%	69%	84%

Q32a. Would you consider visiting any of these events as a participant?

Base: Total Sample (n=2,000)

Note: Green text indicates significantly higher than the total and red text indicates significantly lower than the total

Events considered as a spectator

	CE (n=562)	Non CE (n=1,652)	Total
Total	100%	100%	100%
None of the above	31% ↓	75% ↑	67%
Cadel Evans Great Ocean Road Race	36% ↑	20% ↓	23%
Great Victorian Bike Ride	38% ↑	15% ↓	19%
Cycling Australia National Road Championships	40% ↑	14% ↓	19%
Jayco Herald Sun World Tour	30% ↑	16% ↓	18%
Round the Bay in a Day	33% ↑	14% ↓	17%
Mt Buller MTB Festival	31% ↑	14% ↓	17%
Giant Odyssey Mountain Bike Marathon	30% ↑	13% ↓	16%
Cycle Salute	28% ↑	12% ↓	15%

Q32b. Would you consider visiting any of these events as a spectator?

Base: CE and non CE (n=1,652)

Note: **Green** text indicates significantly higher than the total and **red** text indicates significantly lower than the total

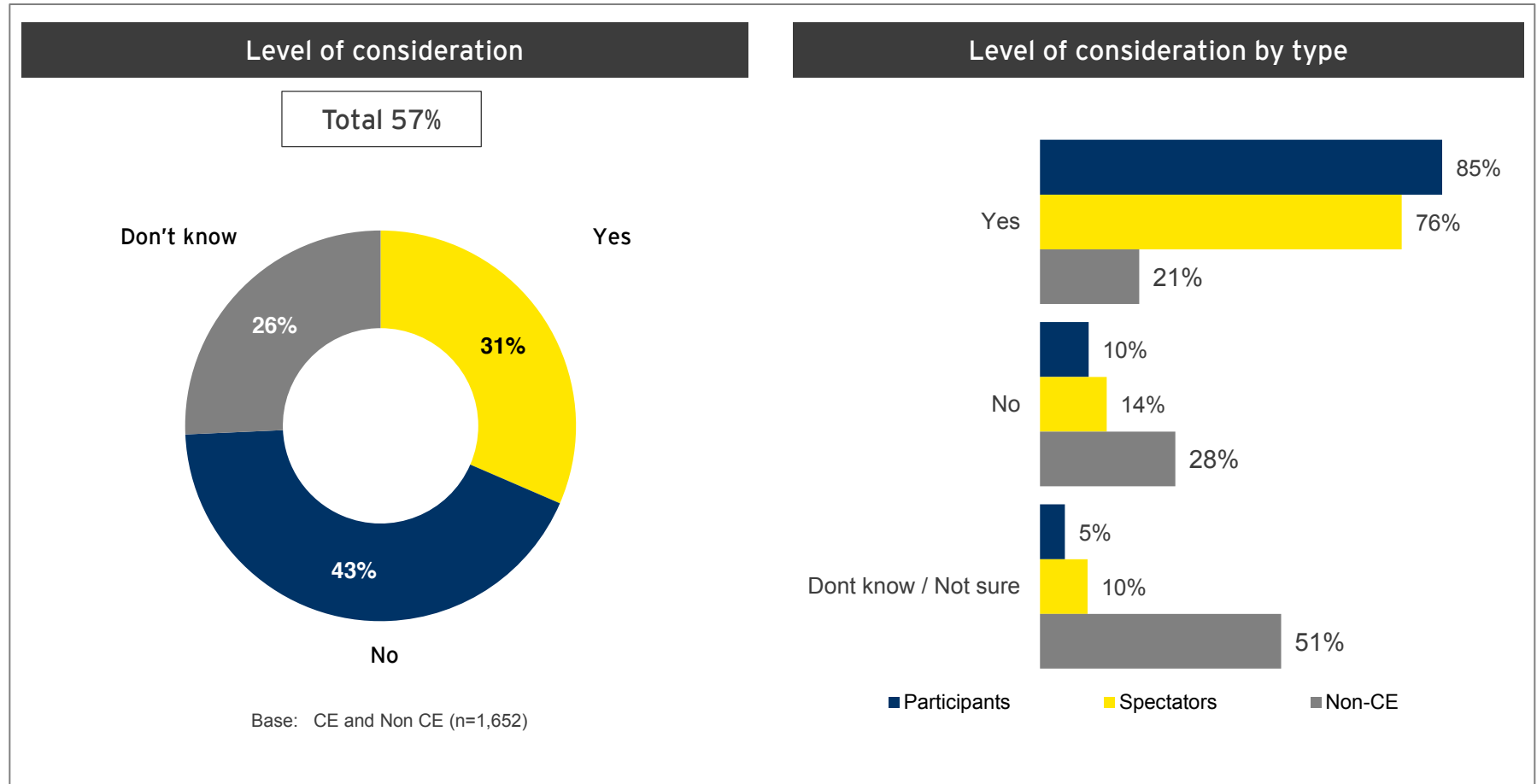
Appendix 6:

Consideration for cycling tourism



Consideration for cycling tourism

- ▶ Three in ten (31%) of those surveyed would consider a trip that included cycling (participating/spectating) in the next five years. Consideration was highest among those who had participated previously (85%) yet we found that one in five (21%) of those with no cycling experience would also consider cycling tourism.



Q24. In the next five years, would you consider any plans to travel for a holiday, short break, or day trip that includes cycling as part of your activities – whether participating or spectating?

Base: Participants (n=408), Spectators (n=283), Non CE (n=1,090)

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