

# GROWING CYCLING TOURISM IN VICTORIA

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 **VICTORIA**

# AGENDA

Introduction



What do we know so far?  
Why is there a need for research?

Destination Visitor Survey



What is it?  
Why does it exist?

Methodology



What did we do?

Results



What did we find?

- Market incidence
- Cycle tourists: what are they doing?  
How often?
- Cycle destinations: where do they go?
- Victoria (and regional Victoria) as a destination.
- Motivators to encourage Victorian visitation.





# INTRODUCTION

In Australia and globally, holiday-makers are becoming increasingly focussed on travel experiences that promote adventure and healthy activities.

Resulting shift in attitudes and behaviours towards **cycle tourism**.

Background data 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).
- 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**.
- 21% of Australians consider Victoria an **ideal place for a cycling experience in Australia**.



# DESTINATION VISITOR SURVEY

Program for research focussed on the **local or regional** level to overcome limitations with main tourism surveys (International or National Visitor Surveys).

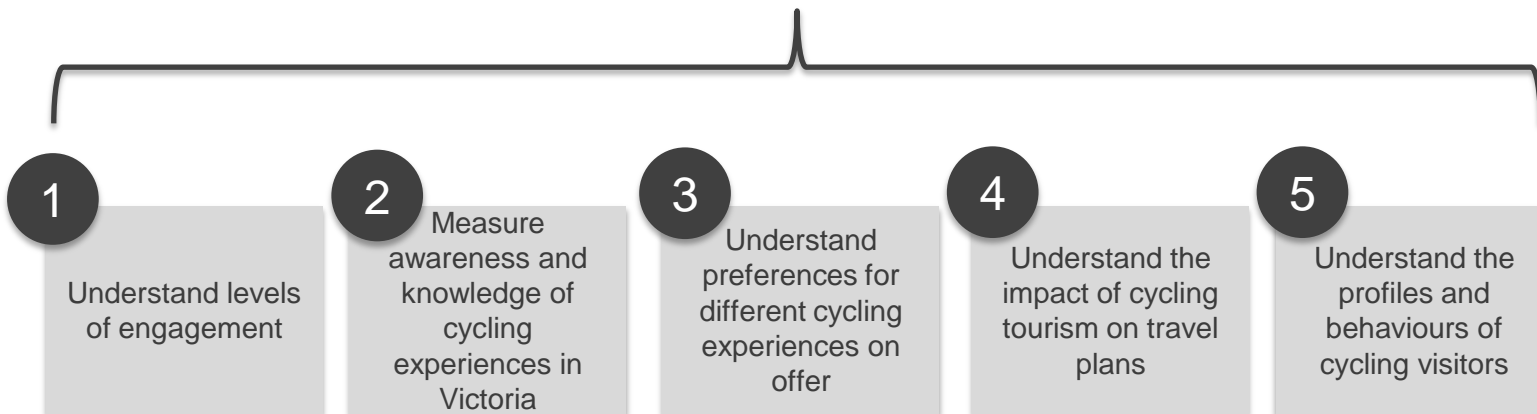
Conducted in partnership with **Tourism Research Australia** in 2014-15.

**EY Sweeney** conducted the study on behalf of Tourism Research Australia and Tourism Victoria.



# RESEARCH OBJECTIVES

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.



# METHODOLOGY

## Survey

- 2,000 online interviews.
- Duration of 15-20 minute.
- Conducted between 25<sup>th</sup> March and 8<sup>th</sup> April 2015.



Sample of  
n=2,000  
respondents



Representative  
by age, gender  
and location  
(VIC, NSW, QLD,  
SA, ACT)



15-20 minute  
online survey

## Sample

- Aged 18-69 years.
- Located in one of the following states/territories; New South Wales, Victoria, Queensland, Australian Capital Territory, and South Australia – **key source markets for Victoria**.
- Sample for the survey was drawn from online panels provided by Lightspeed Research.
- Data was weighted to the 2013 ABS Census for gender, age and location to ensure that it was representative of the population.
- Overall, n=3,131 consumers were asked a series of screening questions used to estimate the size of the cycling tourism market.



# KEY FINDINGS

1

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

2

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

3

Awareness and knowledge of cycle tourism is low but Victoria rates highly in a number of dimensions. Unprompted recall of events is low.

4

There is consideration for cycle tourism, even among those who have not done it before.

5

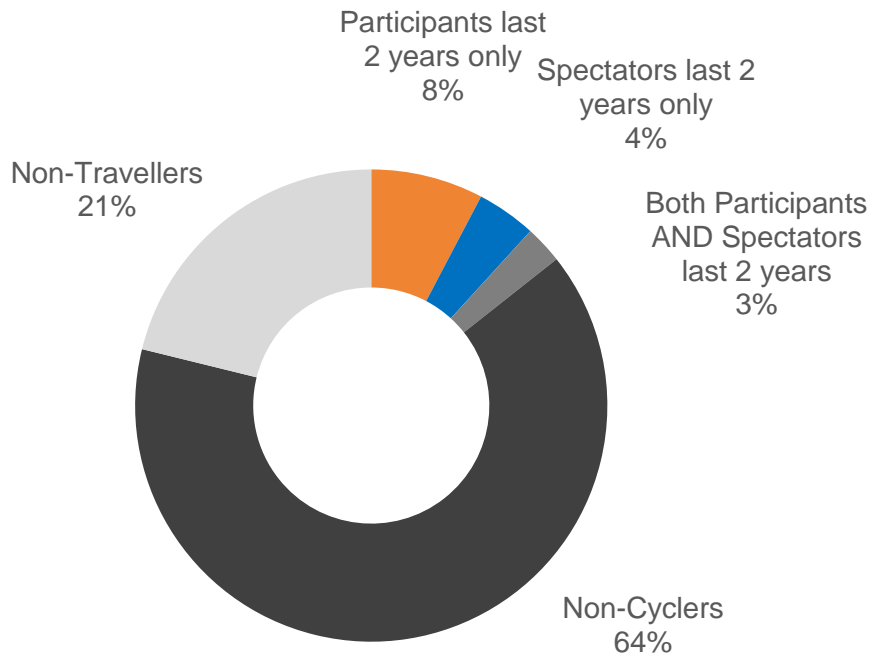
To reduce barriers, accessible online information to aid planning including downloadable maps of tracks, trails and facilities is required

# RESEARCH FINDINGS

## CYCLE TOURISM MARKET



# CYCLE TOURISM MARKET



**'Cycle experiences'** refers to activities such as 'riding in a charity/sports event, sightseeing, recreational cycling or watching a cycling race or other activity where people are cycling'.

Overall, n=3,131 consumers were asked a series of screening questions used to estimate the size of the cycling tourism market.

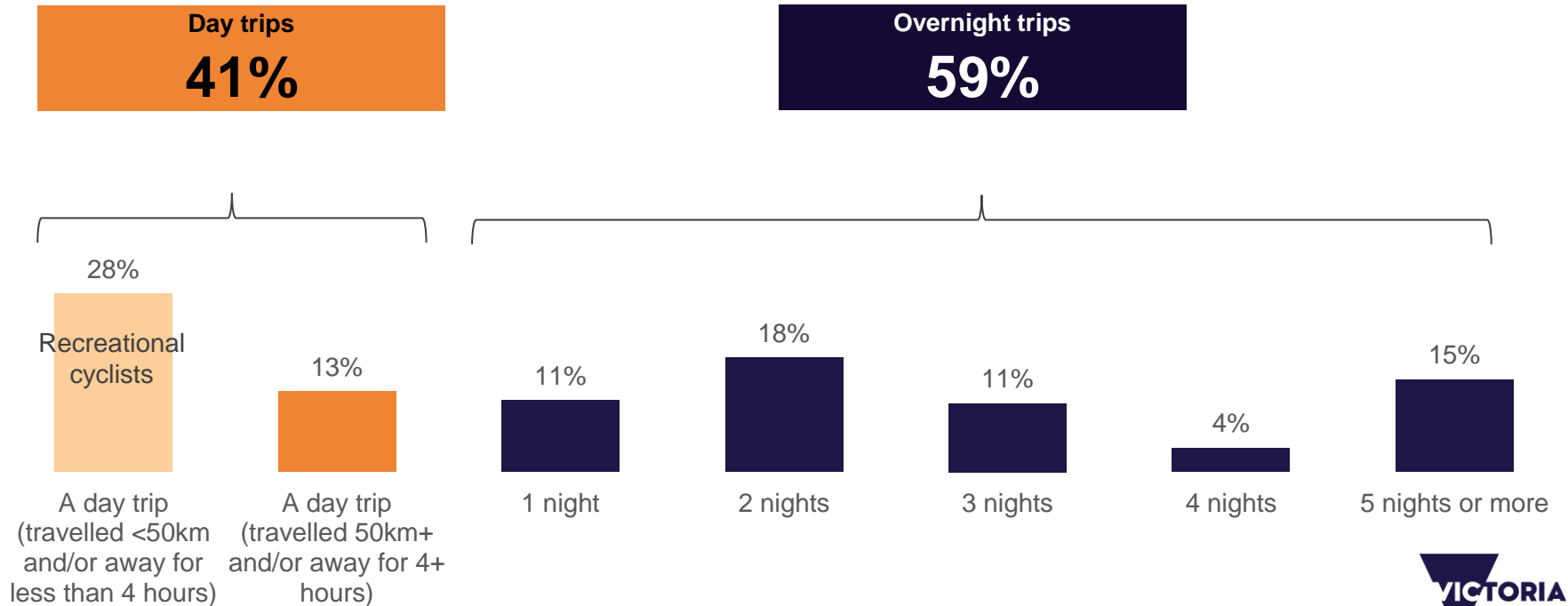
Thinking about your holidays, short breaks or day trips away from home in the last 2 years, did any of them include a cycling experience?

Base: Total sample (n=2,000)

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# TYPES OF CYCLING TRIP

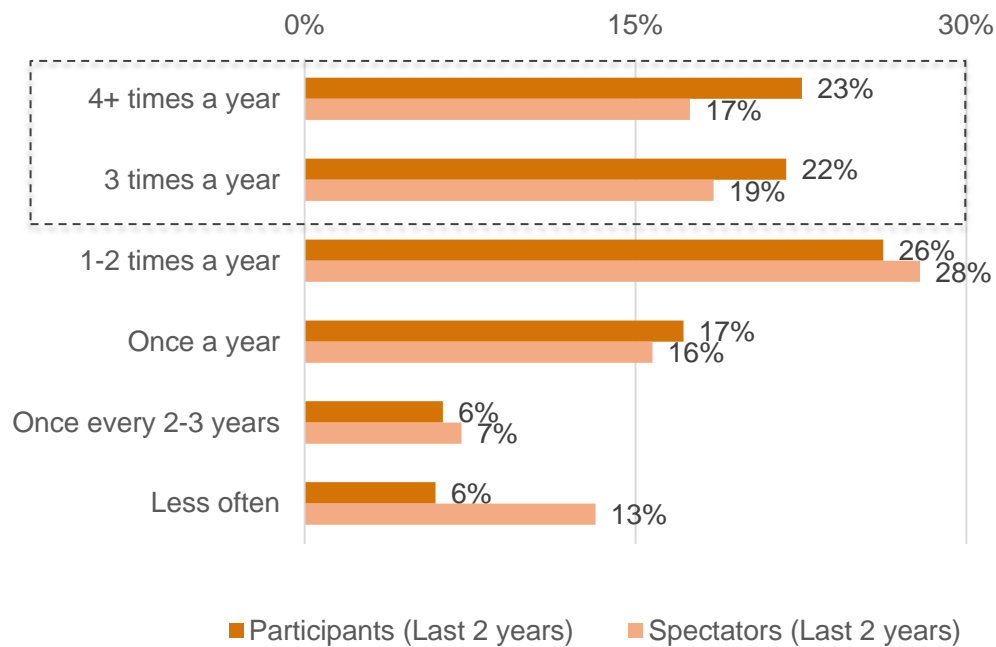


When you take a holiday, short break or day trip that involves either participating in or spectating a cycling experience, is the trip **mostly**...

Base: Participants and Spectators (n=562)

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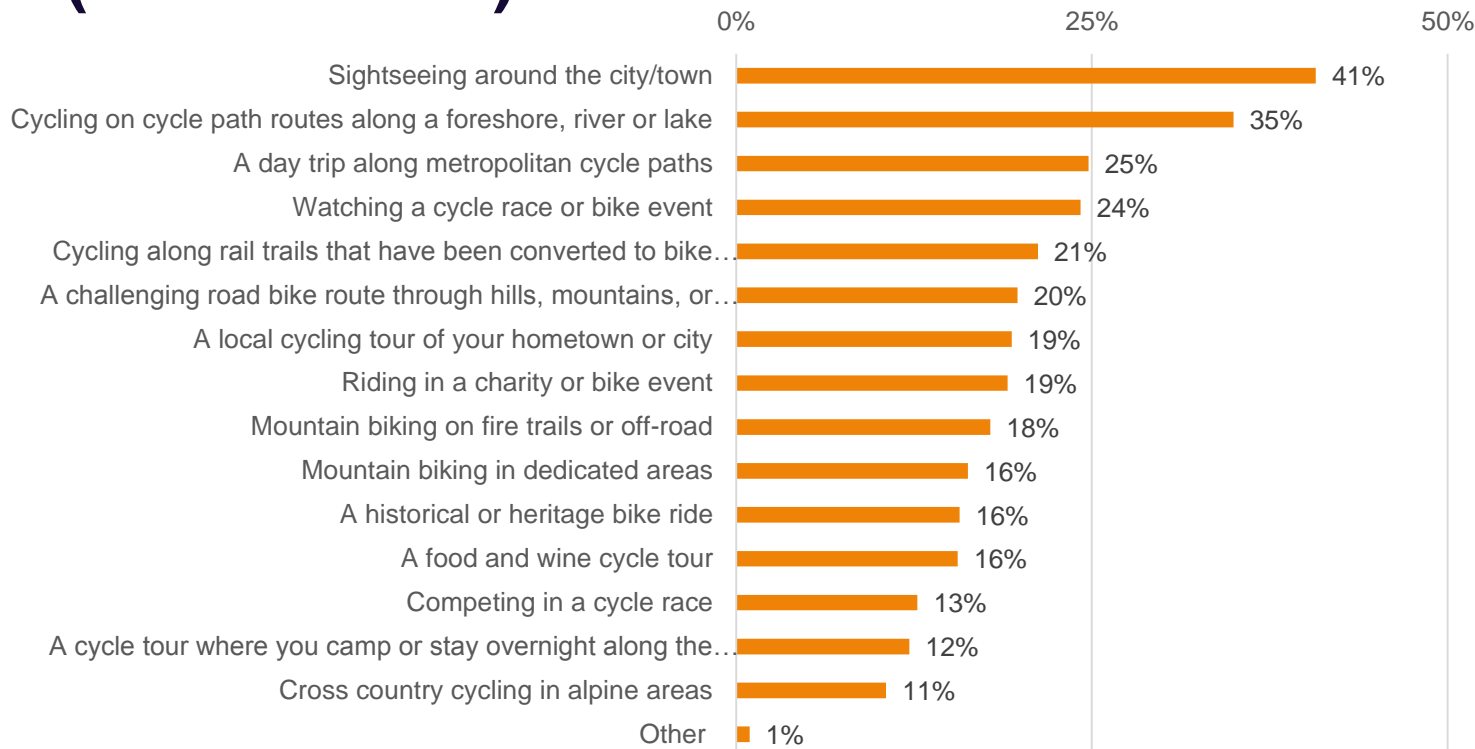
# FREQUENCY OF TRIPS



45% of Participants and 36% of Spectators had gone on at least 3 cycling trips in the last year.



# MOST COMMON CYCLING EXPERIENCES (ANYWHERE)



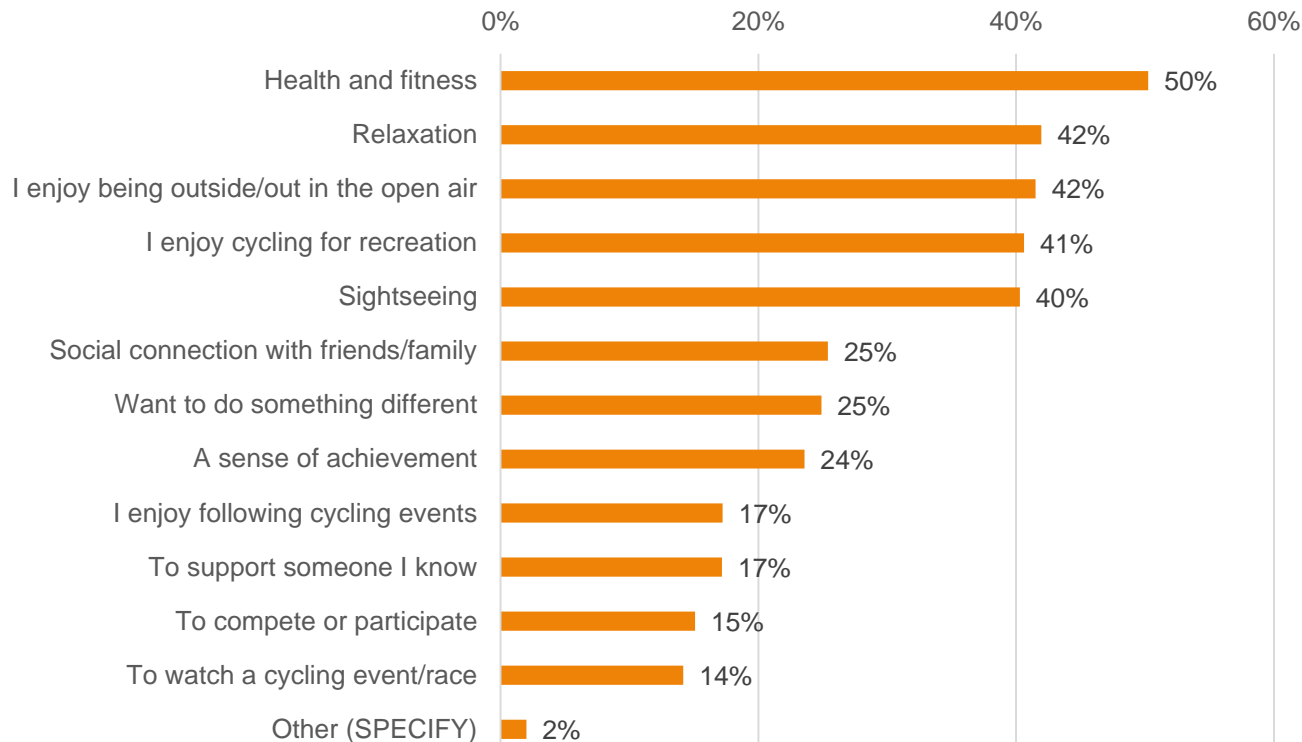
In the last two years, which of the following cycling experiences have you taken part in?

Base: Participants and Spectators (n=562)

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# REASONS FOR PARTICIPATION



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

Base: Participants (n=408)

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# ATTITUDES TOWARDS CYCLING

## Negative attitudes



**51%**

I don't feel experienced enough to consider cycling as part of my holiday/trip



**43%**

It takes a lot of time and effort to plan a cycling trip



**40%**

I'm concerned about cycling problems like punctures and breakdowns



**16%**

It is difficult to find accommodation I like while on a cycling trip

## Positive attitudes



**52%**

Cycling is a great way to experience new places and sights



**48%**

Cycling is a great activity to do with friends/family while on a holiday/trip



**28%**

I am a confident cyclist



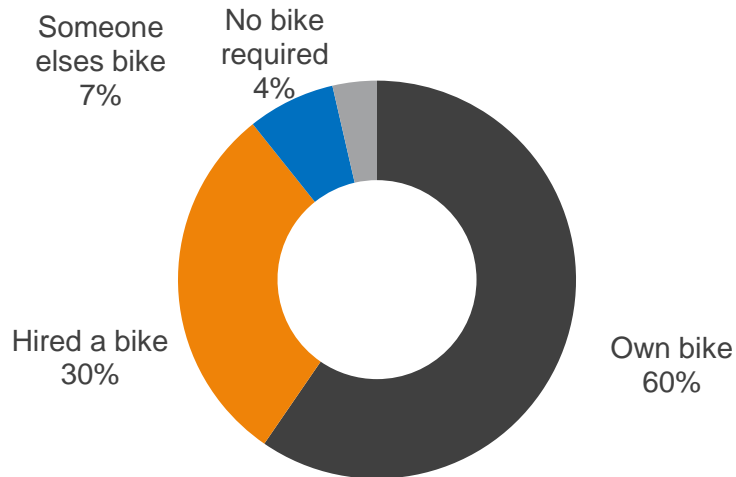
To what extent do you agree or disagree with each of the following statements about cycling, or a cycling holiday, getaway, or experience?

Base: Total sample (n=2,000)

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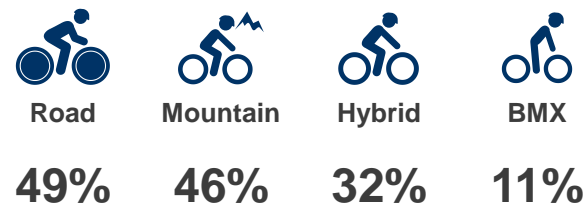
# BICYCLE TYPE ON LAST TRIP

Bicycle used



Those who hired a bike were significantly more likely to have travelled to a regional destination highlighting the importance of hire capabilities.

Bicycle type

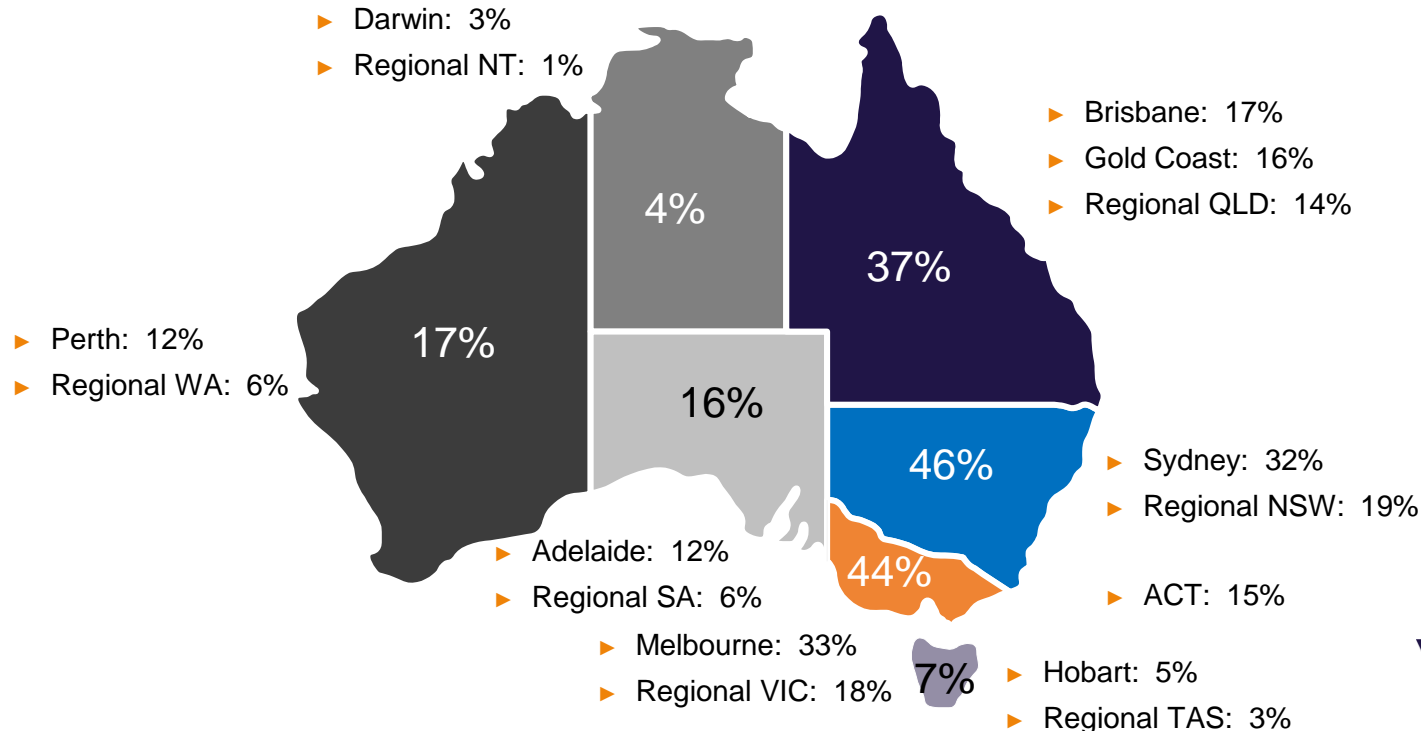


Did you use your own bike, hire a bike or use someone else's bike?  
What type of bike(s) did you mainly use?  
Base: Participants (n=408), Spectators (n=284)

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# CYCLE DESTINATIONS

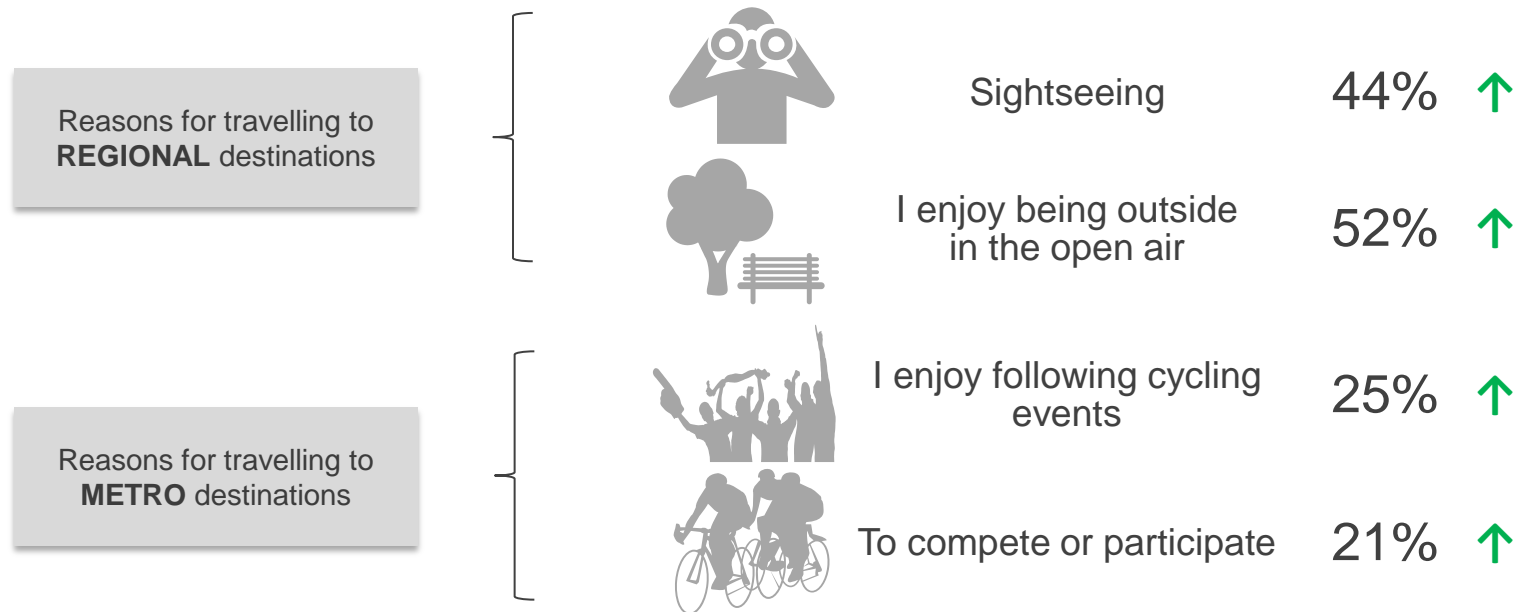


Which of these locations have you visited for a holiday, short break or day trip that included you participating in a cycling experience in the last 2 years?

Base: Participants (n=408)

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# REASONS FOR CYCLE TRIP/DESTINATION



What were the **main** reasons for undertaking the (most recent) cycling experience?  
Base: Participants in regional destination (n=91), participants in metro destination (277)  
Green highlights significantly higher result than total population

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# SOURCES OF INFORMATION



What sources did you use for planning and booking this cycling experience?  
Base: Participants (n=408)

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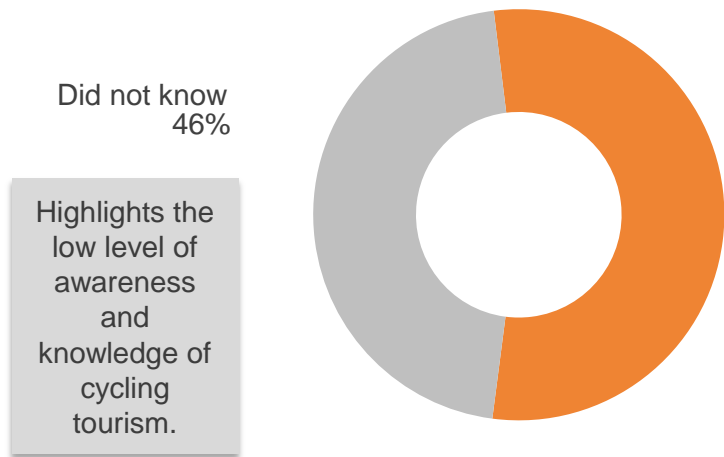


# RESEARCH FINDINGS

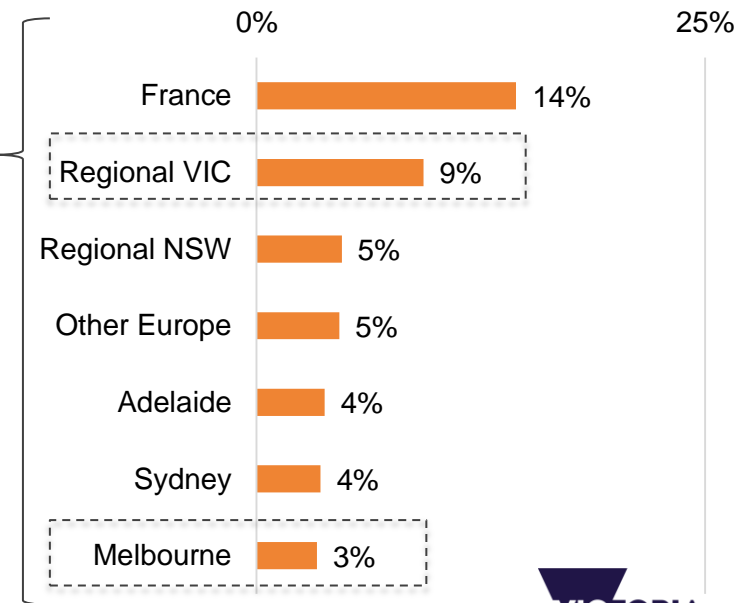
## AWARENESS & KNOWLEDGE OF CYCLE DESTINATIONS

# SPONTANEOUS AWARENESS OF GOOD CYCLING DESTINATIONS

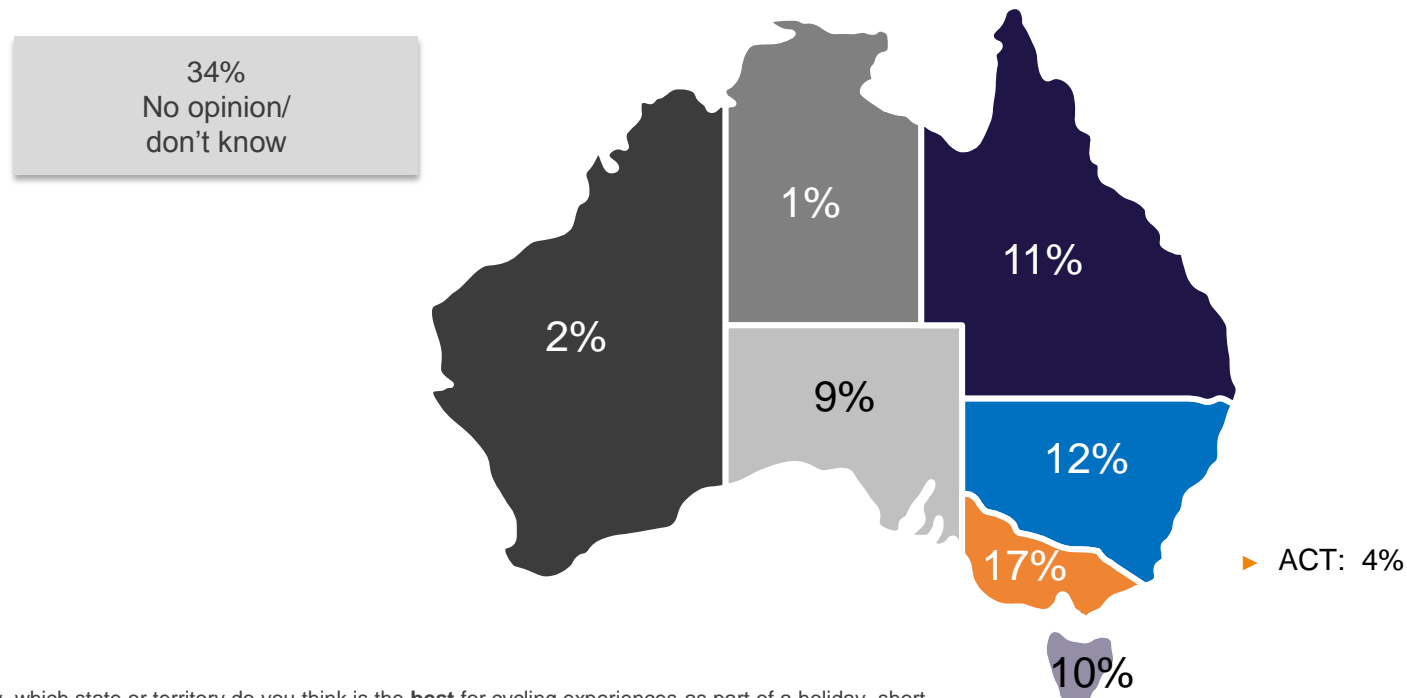
Awareness of cycle destinations



Cycle destinations named



# PROMPTED AWARENESS OF BEST CYCLING DESTINATIONS

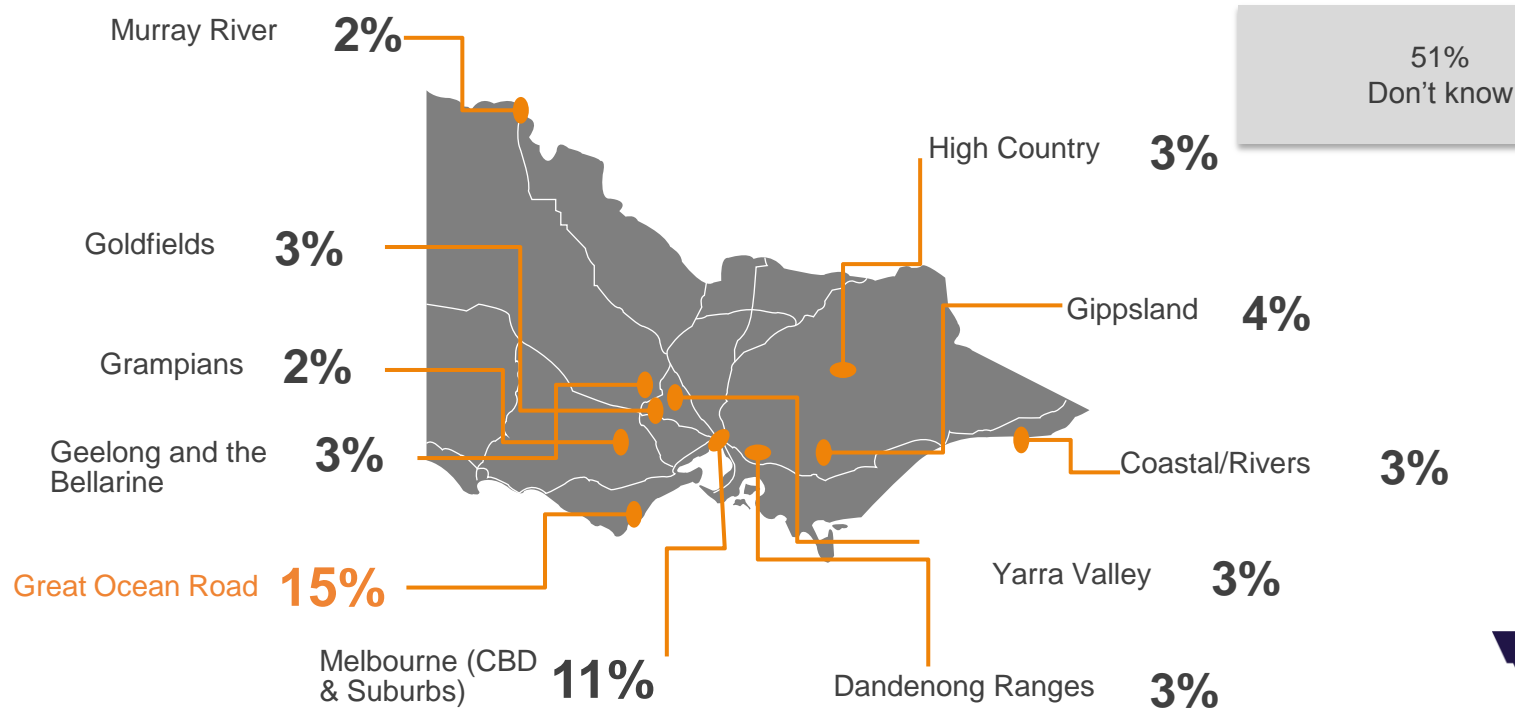


In your view, which state or territory do you think is the **best** for cycling experiences as part of a holiday, short break or day trip?

Base: Total sample (n=2,000)



# AWARENESS OF GOOD VICTORIAN CYCLING DESTINATIONS (TOTAL)

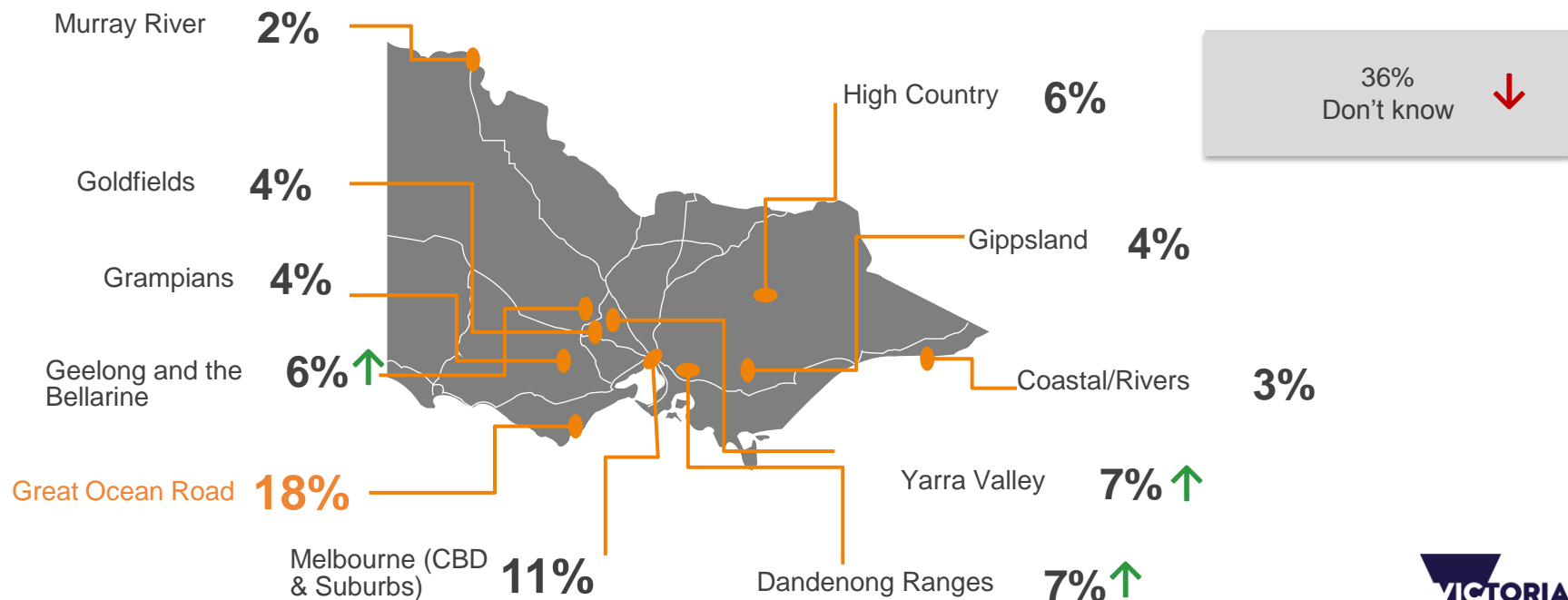


What parts of Victoria can you think of which offer good cycling experiences?  
Base: Those who would consider a cycling trip in the next five years (n=1,139)

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# AWARENESS OF GOOD VICTORIAN CYCLING DESTINATIONS (VICTORIANS)



What parts of Victoria can you think of which offer good cycling experiences?  
Base: Victorians who would consider a cycling trip in the next five years (n=344)  
Green highlights significantly higher result than total population, red is significantly less

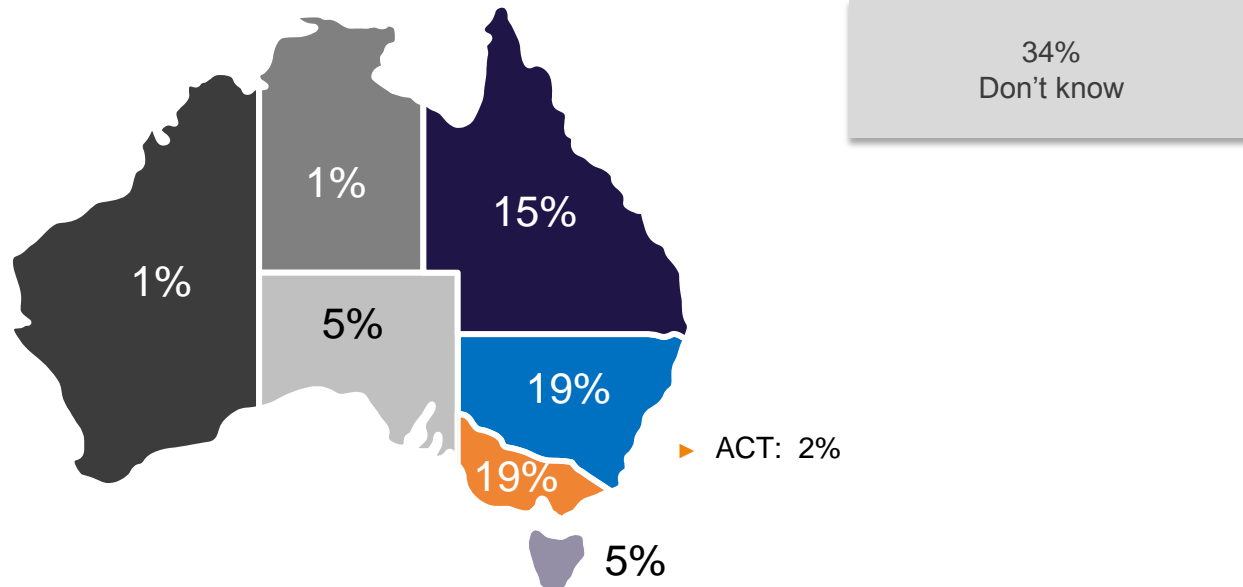
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# WHICH STATE IS THE BEST FOR...

Cycling tourism facilities and accommodation



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

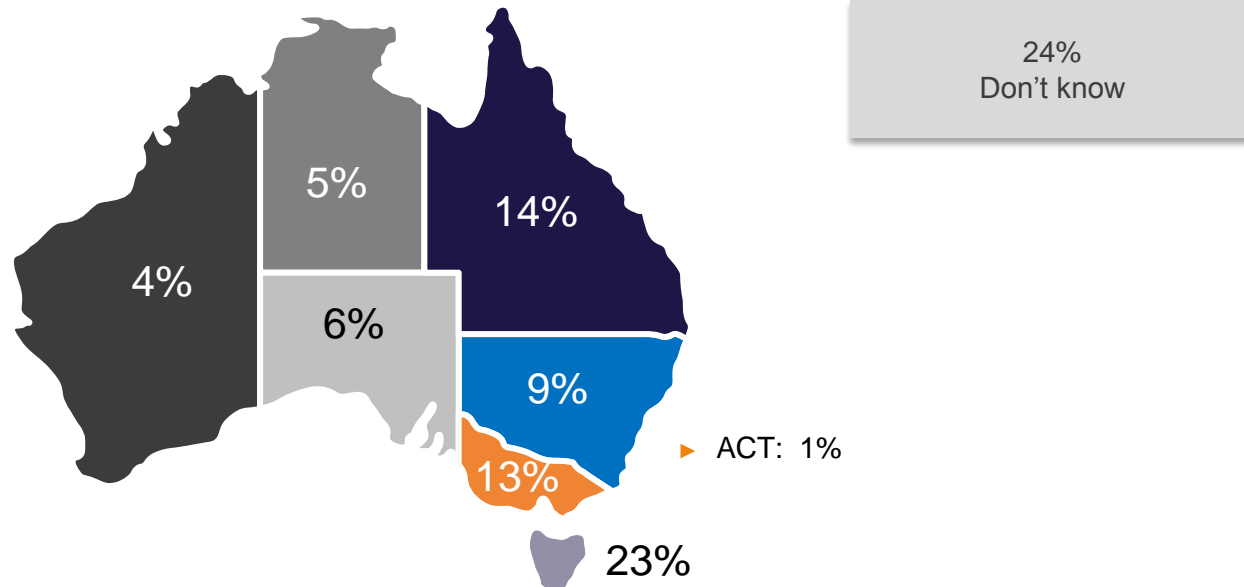
Base: Total sample (n=2,000)

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# WHICH STATE IS THE BEST FOR...

Natural scenery



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

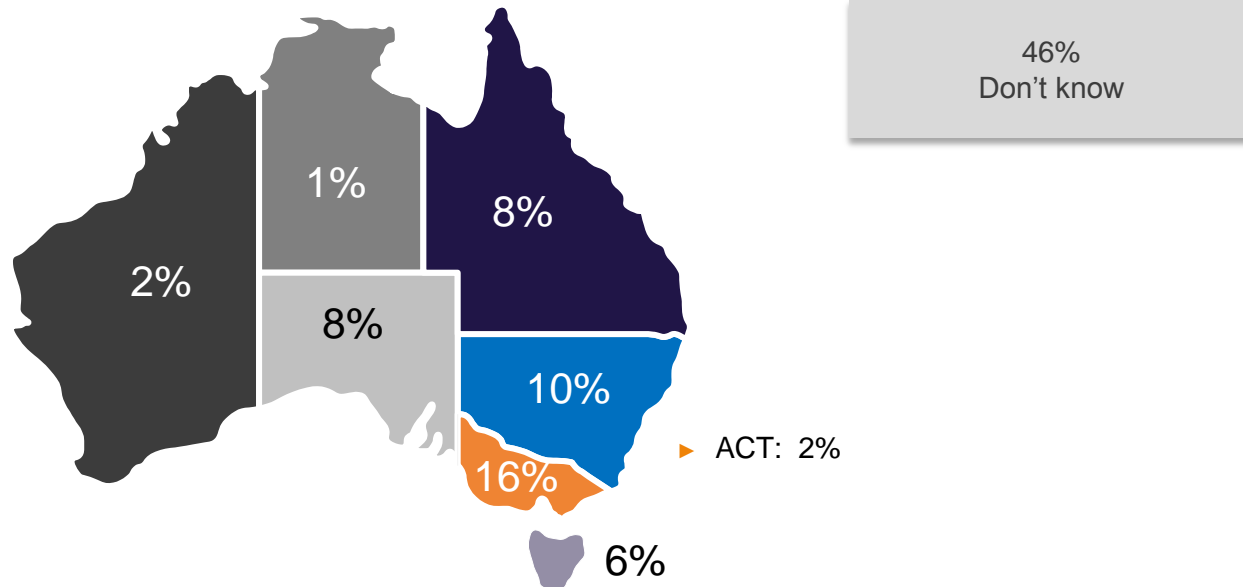
Base: Total sample (n=2,000)

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# WHICH STATE IS THE BEST FOR...

Variety of choice of cycling tours and options



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

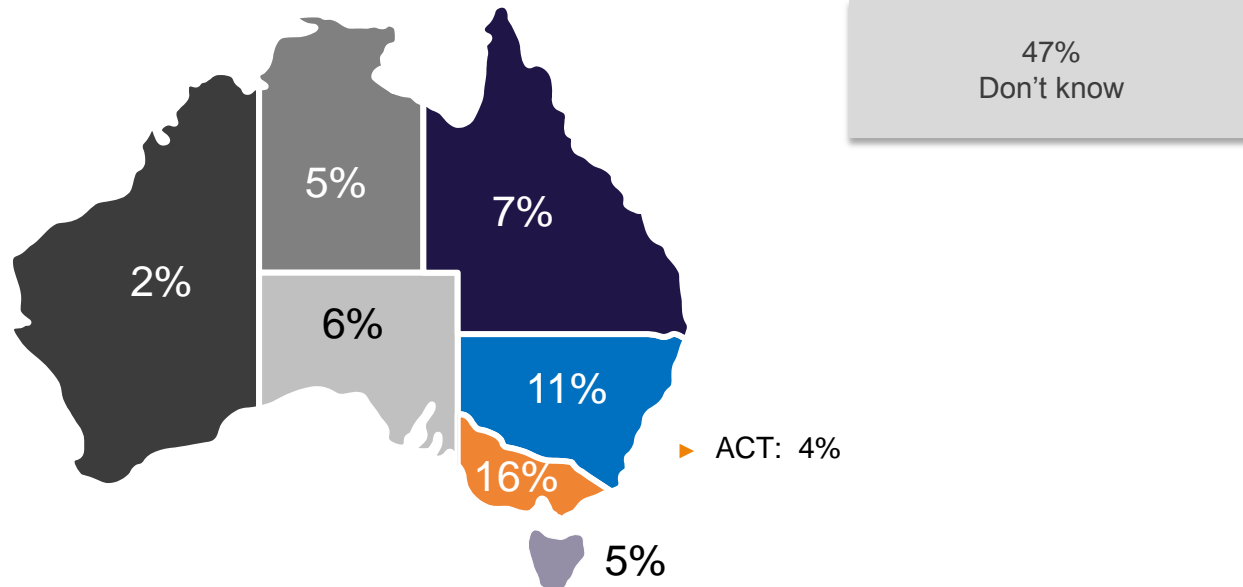
Base: Total sample (n=2,000)

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# WHICH STATE IS THE BEST FOR...

Quality cycling tracks and trails



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

Base: Total sample (n=2,000)

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# SPONTANEOUS AWARENESS OF CYCLING EVENTS

1



20%

Cycling tourists named the Santos Tour Down Under

2



3%

Cycling tourists named the Cadel Evans Great Ocean Road Race

3



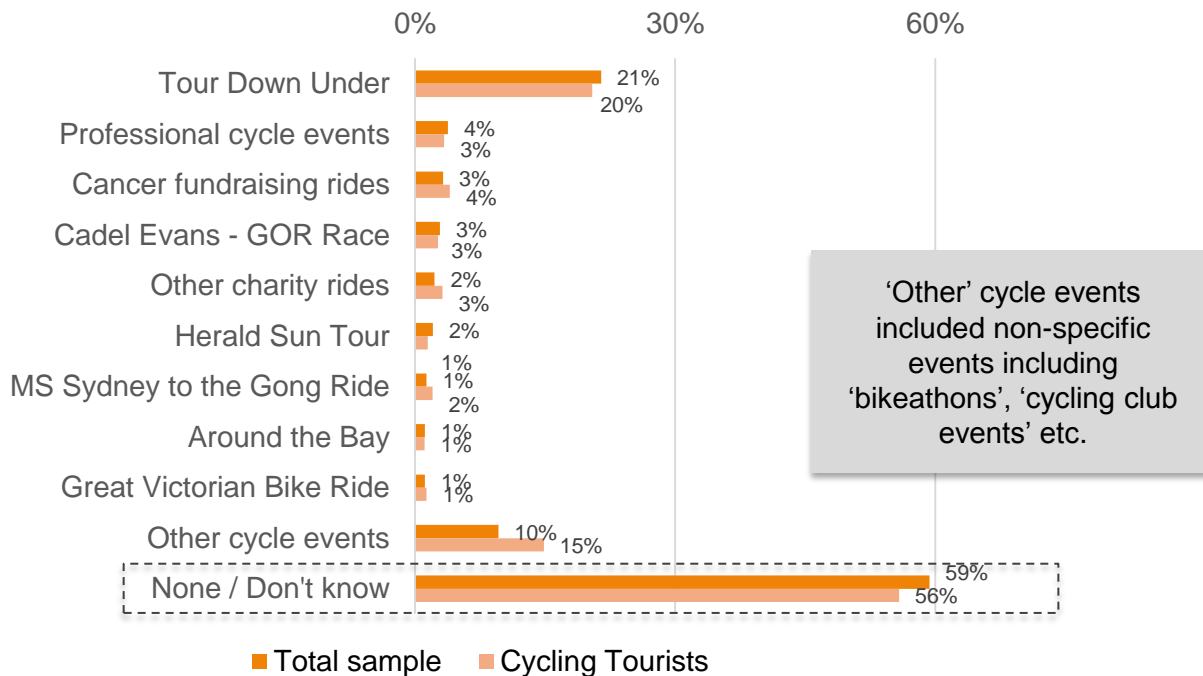
1%

Cycling tourists named the Jayco Herald Sun Tour





# SPONTANEOUS AWARENESS OF CYCLING EVENTS



# PROMPTED AWARENESS OF CYCLING EVENTS

1



**42%**

Cycling tourists had heard  
of the RACV Great  
Victorian Bike Ride

2



**38%**

Cycling tourists had heard  
of the Cadel Evans Great  
Ocean Road Race

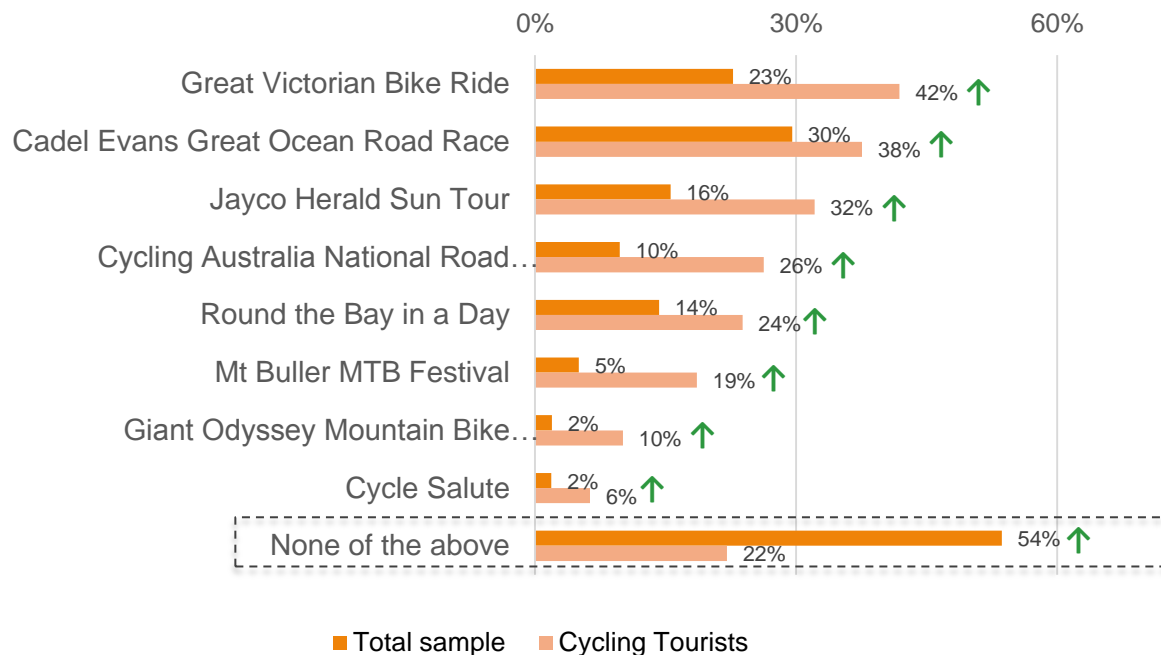
3



**32%**

Cycling tourists had heard  
of the Jayco Herald Sun  
Tour

# PROMPTED AWARENESS OF CYCLING EVENTS



Have you heard of any of the following Victorian cycling events?  
Base: Total sample (n=2,000), Cycle tourists (n=562)

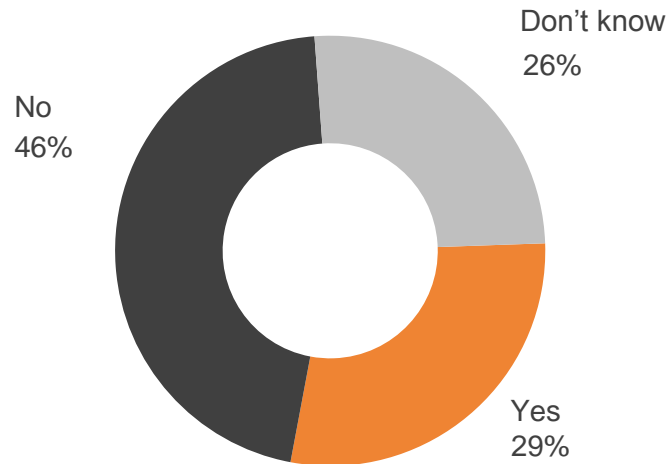
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# **RESEARCH FINDINGS**

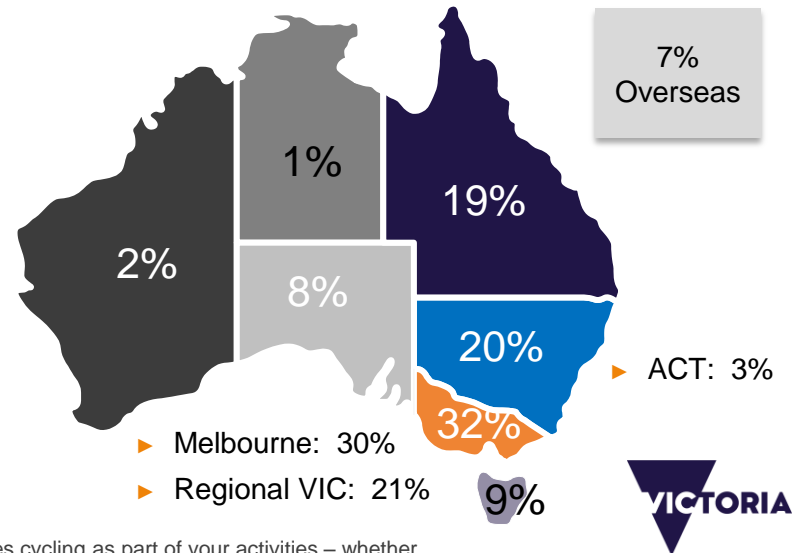
## **CONSIDERATION OF VICTORIA AS A CYCLE DESTINATION**

# CONSIDERATION OF A FUTURE CYCLE TRIP

Consideration of taking a holiday, short break or daytrip involving cycling in the next 5 years



Destination most likely to visit

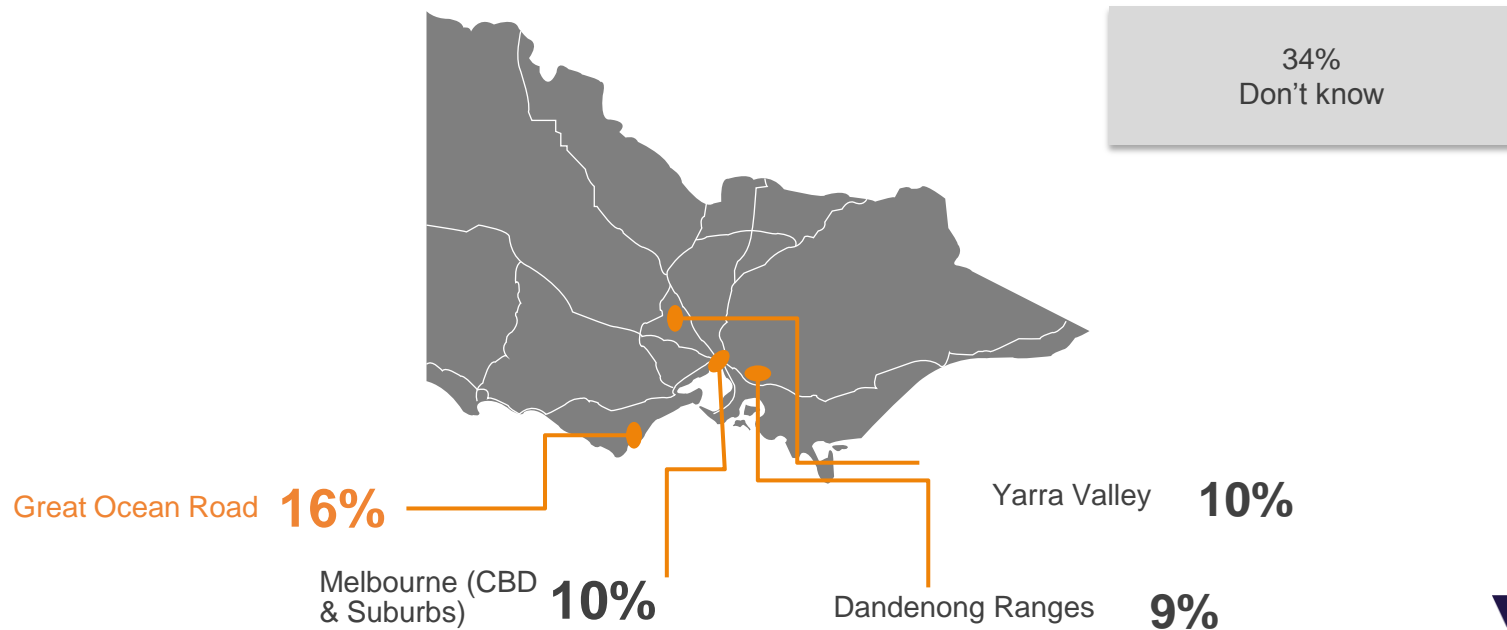


In the next five years, would you consider any plans to travel for a holiday, short break, or day trip that includes cycling as part of your activities – whether participating or spectating?

Base: Total sample (n=2,000), consider cycling trip next 5 years (n=1,139)

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# DESTINATIONS CONSIDERED AMONGST VICTORIANS



Of those that you would consider visiting, which location would you **most likely** visit?  
Base: Victorians who would consider a cycling trip in the next 5 years (n=169)

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# ATTITUDES TO VICTORIA AS A CYCLE DESTINATION

## Negative statements

**36%**

I don't know where to find information on cycling opportunities in Victoria

**33%**

The weather is too unpredictable to enjoy a cycling trip in Victoria

**20%**

It's difficult to get my bike to areas that offer good cycling experiences

## Positive statements

Victoria has beautiful scenery that would make a cycling trip enjoyable

**55%**

Victoria has some interesting places that I'd like to visit by bicycle

**36%**

Victoria has lots of choice when it comes to different cycling experiences

**35%**

Victoria is a safe place to cycle

**32%**



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?  
Base: Total sample (n=2,000)

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# TOP 4 IDEAS ENCOURAGING CYCLE TRIPS IN VICTORIA



1

**38%**

Downloadable  
maps of tracks,  
trails and facilities



2

**37%**

Accessible  
information online



3

**37%**

Extensive cycle  
paths and trails



4

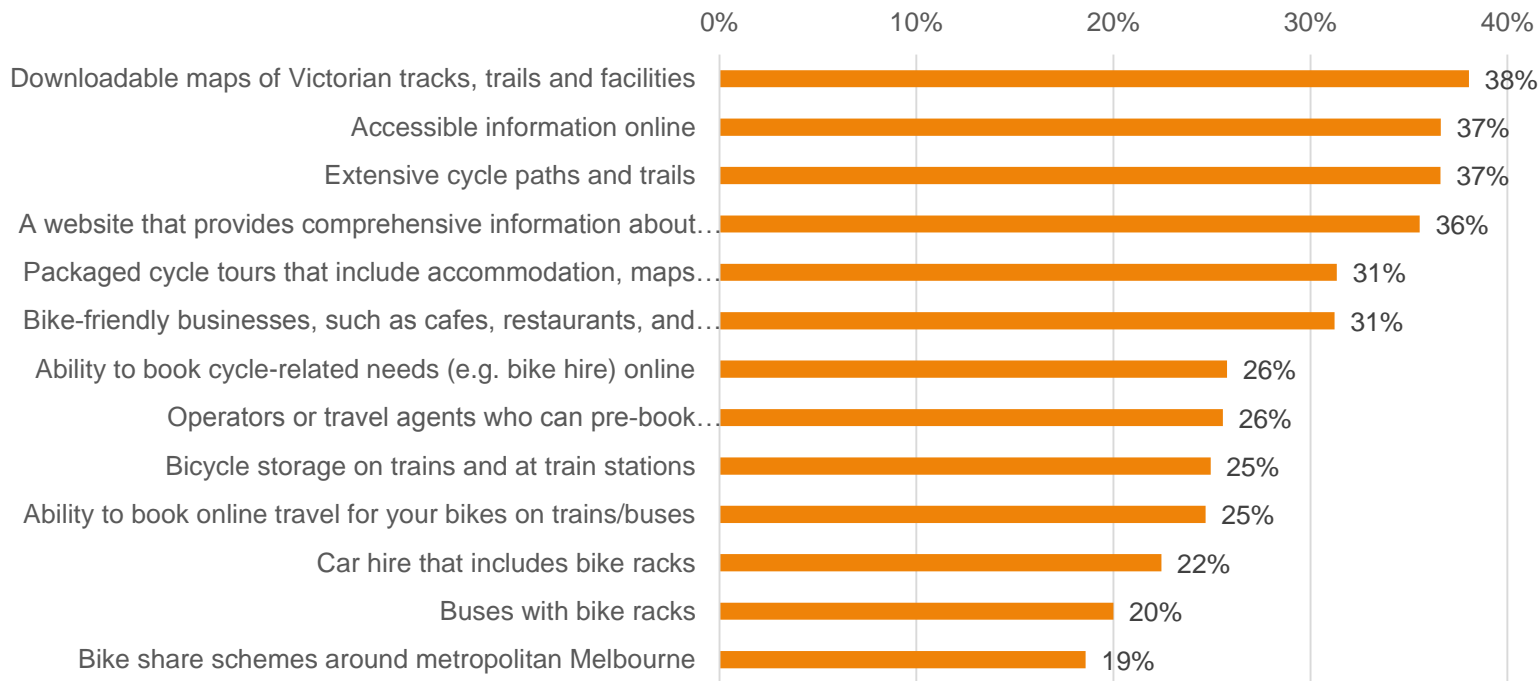
**36%**

Website that provides  
comprehensive  
information about  
planning a cycle trip in  
Victoria





# ENCOURAGING CYCLE TRIPS IN VICTORIA



How appealing do you find each of the following ideas?

Base: : Those who would consider a cycling trip in the next 5 years (n=1,139)

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# **SUMMARY & RECOMMENDATIONS**

# IN SUMMARY...

1

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

2

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

3

Awareness and knowledge of cycle tourism is low but Victoria rates highly in a number of dimensions. Unprompted recall of events is low.

4

There is consideration for cycle tourism, even among those who have not done it before.

5

To reduce barriers, accessible online information to aid planning including downloadable maps of tracks, trails and facilities is required

# RECOMMENDATIONS

## Configure



Give 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**

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# RECOMMENDATIONS

## Communicate



**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**

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# RECOMMENDATIONS

## Communicate



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**

# TOURISM VICTORIA INITIATIVES

# QUESTIONS?



# CONTACT DETAILS

**TOURISM VICTORIA: (03) 9653 9778 OR [GAIL.REUTENS@TOURISM.VIC.GOV.AU](mailto:GAIL.REUTENS@TOURISM.VIC.GOV.AU)**

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