GROWING CYCLING TOURISM IN VICTORIA

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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.

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
**METHODOLOGY**

**Survey**
- 2,000 online interviews.
- Duration of 15-20 minute.
- Conducted between 25th March and 8th April 2015.

**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
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)

Overall, n=3,131 consumers were asked a series of screening questions used to estimate the size of the cycling 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’.
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)
FREQUENCY OF TRIPS

- 4+ times a year: 23% (Participants) 17% (Spectators)
- 3 times a year: 22% (Participants) 19% (Spectators)
- 1-2 times a year: 28% (Participants) 26% (Spectators)
- Once a year: 16% (Participants) 17% (Spectators)
- Once every 2-3 years: 6% (Participants) 6% (Spectators)
- Less often: 13% (Participants) 6% (Spectators)

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

How often would you take a holiday, short break or day trip that involves participating in a cycling experience? Base: Participants (n=408), Spectators (n=284)
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)

- Sightseeing around the city/town: 41%
- Cycling on cycle path routes along a foreshore, river or lake: 35%
- A day trip along metropolitan cycle paths: 25%
- Watching a cycle race or bike event: 24%
- Cycling along rail trails that have been converted to bike paths: 21%
- A challenging road bike route through hills, mountains, or...: 20%
- A local cycling tour of your hometown or city: 19%
- Riding in a charity or bike event: 19%
- Mountain biking on fire trails or off-road: 18%
- Mountain biking in dedicated areas: 16%
- A historical or heritage bike ride: 16%
- A food and wine cycle tour: 16%
- Competing in a cycle race: 13%
- A cycle tour where you camp or stay overnight along the...: 12%
- Cross country cycling in alpine areas: 11%
- Other: 1%
What are the reasons that you participate in cycling experiences or spectate cycling events/races?

**Base: Participants (n=408)**

- **Health and fitness**: 50%
- **Relaxation**: 42%
- **I enjoy being outside/out in the open air**: 42%
- **I enjoy cycling for recreation**: 41%
- **Sightseeing**: 40%
- **Social connection with friends/family**: 25%
- **Want to do something different**: 25%
- **A sense of achievement**: 24%
- **I enjoy following cycling events**: 17%
- **To support someone I know**: 17%
- **To compete or participate**: 15%
- **To watch a cycling event/race**: 14%
- **Other (SPECIFY)**: 2%
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)
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)

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

- Melbourne: 33%
- Regional VIC: 18%
- Hobart: 5%
- Regional TAS: 3%
- ACT: 15%
- Sydney: 32%
- Regional NSW: 19%
- Brisbane: 17%
- Gold Coast: 16%
- Regional QLD: 14%
- Adelaide: 12%
- Regional SA: 6%
- Perth: 12%
- Regional WA: 6%
- Darwin: 3%
- Regional NT: 1%
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

**Reasons for travelling to REGIONAL destinations**

- Sightseeing: 44% ↑
- I enjoy being outside in the open air: 52% ↑
- I enjoy following cycling events: 25% ↑
- To compete or participate: 21% ↑

**Reasons for travelling to METRO destinations**

- Sightseeing: 44% ↑
- I enjoy being outside in the open air: 52% ↑
- To compete or participate: 21% ↑
**SOURCES OF INFORMATION**

<table>
<thead>
<tr>
<th>Source</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Family/Friends/Word of Mouth (not via social media)</td>
<td>28%</td>
</tr>
<tr>
<td>Internet search engine (eg. Google)</td>
<td>25%</td>
</tr>
<tr>
<td>Own knowledge/previous experience</td>
<td>20%</td>
</tr>
<tr>
<td>Travel and tourism brochures</td>
<td>18%</td>
</tr>
<tr>
<td>Visitor Information Centre</td>
<td>18%</td>
</tr>
<tr>
<td>Online travel sites for travel reviews and booking...</td>
<td>17%</td>
</tr>
<tr>
<td>Social Media (eg. Facebook, Twitter) to get advice</td>
<td>16%</td>
</tr>
<tr>
<td>Travel book or guide</td>
<td>16%</td>
</tr>
<tr>
<td>Travel desk at accommodation</td>
<td>15%</td>
</tr>
<tr>
<td>Tourism website</td>
<td>14%</td>
</tr>
<tr>
<td>Directly with operator/provider</td>
<td>12%</td>
</tr>
<tr>
<td>Advertising, travel articles or documentaries (TV, radio or...)</td>
<td>11%</td>
</tr>
<tr>
<td>Cycling magazines</td>
<td>11%</td>
</tr>
<tr>
<td>Cycle club or association website and/or e-newsletter...</td>
<td>11%</td>
</tr>
<tr>
<td>Online cycling community website (e.g. theberm.com.au)</td>
<td>11%</td>
</tr>
<tr>
<td>Travel agent (in person or over the phone)</td>
<td>10%</td>
</tr>
<tr>
<td>Bike shop</td>
<td>10%</td>
</tr>
</tbody>
</table>

Participants used multiple information sources when planning their cycle trips.

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

AWARENESS & KNOWLEDGE OF CYCLE DESTINATIONS
SPONTANEOUS AWARENESS OF GOOD CYCLING DESTINATIONS

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

Highlights the low level of awareness and knowledge of cycling tourism.

<table>
<thead>
<tr>
<th>Cycle destinations named</th>
<th>0%</th>
<th>25%</th>
</tr>
</thead>
<tbody>
<tr>
<td>France</td>
<td>14%</td>
<td></td>
</tr>
<tr>
<td>Regional VIC</td>
<td>9%</td>
<td></td>
</tr>
<tr>
<td>Regional NSW</td>
<td>5%</td>
<td></td>
</tr>
<tr>
<td>Other Europe</td>
<td>5%</td>
<td></td>
</tr>
<tr>
<td>Adelaide</td>
<td>4%</td>
<td></td>
</tr>
<tr>
<td>Sydney</td>
<td>4%</td>
<td></td>
</tr>
<tr>
<td>Melbourne</td>
<td>3%</td>
<td></td>
</tr>
</tbody>
</table>

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

- Great Ocean Road: 18%
- Melbourne (CBD & Suburbs): 11%
- Geelong and the Bellarine: 6% ↑
- Dandenong Ranges: 7% ↑
- Yarra Valley: 7% ↑
- Coastal/Rivers: 3%
- Gippsland: 4%
- High Country: 6%
- Murray River: 2%
- Goldfields: 4%
- Grampians: 4%
- Murray River: 2%

Don't know: 36%
Which state do you think is best when it comes to cycling tourism facilities and accommodation?

- ACT: 2%
- Victoria: 19%
- New South Wales: 15%
- South Australia: 5%
- Queensland: 5%
- Western Australia: 1%
- Northern Territory: 1%
- Tasmania: 1%
- Other/Australian Capital Territory: 19%
- Don't know: 34%

Base: Total sample (n=2,000)
Which state or territory do you think is best when it comes to...?

Base: Total sample (n=2,000)
Which state or territory do you think is best when it comes to…?

Base: Total sample (n=2,000)

Variety of choice of cycling tours and options

- ACT: 2%
- 16%
- 10%
- 8%
- 8%
- 1%
- 2%
- 6%

46% Don’t know
WHICH STATE IS THE BEST FOR…

Quality cycling tracks and trails

- Victoria: 16%
- Queensland: 11%
- Western Australia: 7%
- South Australia: 5%
- Tasmania: 5%
- New South Wales: 6%
- Northern Territory: 2%
- Australian Capital Territory: 4%
- Don’t know: 47%

Which state or territory do you think is best when it comes to…?
Base: Total sample (n=2,000)
What Australian cycling events are you aware of?
Base: Cycle tourists (n=517)

20% Cycling tourists named the Santos Tour Down Under

3% Cycling tourists named the Cadel Evans Great Ocean Road Race

1% Cycling tourists named the Jayco Herald Sun Tour
SPONTANEOUS AWARENESS OF CYCLING EVENTS

What Australian cycling events are you aware of?
Base: Total sample (n=2,000), Cycle tourists (n=517)

- Tour Down Under: 21%
- Professional cycle events: 20%
- Cancer fundraising rides: 4%
- Cadel Evans - GOR Race: 3%
- Other charity rides: 2%
- Herald Sun Tour: 2%
- MS Sydney to the Gong Ride: 1%
- Around the Bay: 1%
- Great Victorian Bike Ride: 1%
- Other cycle events: 10%
- None / Don’t know: 58%

‘Other’ cycle events included non-specific events including ‘bikeathons’, ‘cycling club events’ etc.
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

Have you heard of any of the following Victorian cycling events?
Base: Cycle tourists (n=517)
Have you heard of any of the following Victorian cycling events?
Base: Total sample (n=2,000), Cycle tourists (n=562)
RESEARCH FINDINGS

CONSIDERATION OF VICTORIA AS A CYCLE DESTINATION
Consideration of a Future Cycle Trip

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)

- Yes: 29%
- No: 46%
- Don’t know: 26%

Destination most likely to visit:
- Overseas: 7%
- Melbourne: 30%
- Regional VIC: 21%
- ACT: 3%
- 9%
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)

- Great Ocean Road: 16%
- Melbourne (CBD & Suburbs): 10%
- Yarra Valley: 10%
- Dandenong Ranges: 9%
- Don't know: 34%
# ATTITUDES TO VICTORIA AS A CYCLE DESTINATION

<table>
<thead>
<tr>
<th>Negative statements</th>
<th>Positive statements</th>
</tr>
</thead>
<tbody>
<tr>
<td>36% I don’t know where to find information on cycling opportunities in Victoria</td>
<td>55% Victoria has beautiful scenery that would make a cycling trip enjoyable</td>
</tr>
<tr>
<td>33% The weather is too unpredictable to enjoy a cycling trip in Victoria</td>
<td>36% Victoria has some interesting places that I’d like to visit by bicycle</td>
</tr>
<tr>
<td>20% It’s difficult to get my bike to areas that offer good cycling experiences</td>
<td>35% Victoria has lots of choice when it comes to different cycling experiences</td>
</tr>
<tr>
<td>32% Victoria is a safe place to cycle</td>
<td>32% Victoria is a safe place to cycle</td>
</tr>
</tbody>
</table>

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)
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

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)

UNCLASSIFIED
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)

- Downloadable maps of Victorian tracks, trails and facilities: 38%
- Accessible information online: 37%
- Extensive cycle paths and trails: 37%
- A website that provides comprehensive information about cycling in Victoria: 36%
- Packaged cycle tours that include accommodation, maps and travel: 31%
- Bike-friendly businesses, such as cafes, restaurants, and public transport: 31%
- Ability to book cycle-related needs (e.g. bike hire) online: 26%
- Operators or travel agents who can pre-book cycle-related needs: 26%
- Bicycle storage on trains and at train stations: 25%
- Ability to book online travel for your bikes on trains and buses: 25%
- Car hire that includes bike racks: 22%
- Buses with bike racks: 20%
- Bike share schemes around metropolitan Melbourne: 19%
SUMMARY & RECOMMENDATIONS
The cycle tourism market is relatively small in size but those involved often take multiple trips each year and are highly engaged.

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

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

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

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**.
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**.
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

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