

## RECAP OF THE CYCLE TOURISM RESEARCH

The Destination Visitor Survey is a program for research focussed on the **local or regional** level to overcome limitations with main tourism surveys (National or International Visitor Surveys). In the main surveys, there is information about visitors cycling a bike at some point throughout their trip however beyond this, the information is limited and does not extend to motivations or barriers of cycle tourism.

In 2014-15, EY Sweeney conducted a study on **Growing Cycling Tourism in Victoria** on behalf of Tourism Research Australia and Tourism Victoria.

The research results were presented on the 18<sup>th</sup> May 2016 at a stakeholder session and as an outcome, extra analysis was conducted.

## EXTRA ANALYSIS (SPECIFIC ANALYSIS FROM THE CYCLE RESEARCH)

### **1. The incidence of cycle tourists who participated in mountain biking on fire trails and alpine areas.**

Of those who have participated or spectated in a cycling experience, 28% have participated in **EITHER** mountain biking on fire trails/off road OR mountain biking in dedicated areas. This equates to 31% of participants.

### **2. The count of those who had done more activities (5+ types of activities) versus less activities (less than 5 types of activities).**

79% of participants/spectators have undertaken 1-4 cycling experiences in the last two years (refer to Table 1 overleaf). The average number of cycling experiences undertaken by participants and spectators was 3.1.

**Table 1: Number of cycling activities undertaken by participants and spectators**

<b>Number of cycling activities undertaken in the last two years</b>	<b>% of participants/spectators (n=562)</b>
1	30%
2	18%
3	20%
4	11%
5	9%
6	6%
7	3%
8	1%
9	0%
10	1%
11	0%
12	0%
13	0%
15	1%
<b>1 TO 4 ACTIVITIES</b>	<b>79%</b>
<b>5 OR MORE ACTIVITIES</b>	<b>21%</b>
<b>Average number of activities</b>	<b>3.1</b>

Source: National and International Visitor Surveys, year ending December 2015, released March 2015.

\* Please note: international cycle tourists to Victoria did not indicate which state the cycling was undertaken while on their trip to Australia.

## EXTRA ANALYSIS (GENERAL ANALYSIS FROM THE NATIONAL AND INTERNATIONAL VISITOR SURVEYS)

In the year ending December 2015, there was a total of 69.9 million visitors (comprising of **international and domestic overnight and daytrip visitors**) to Victoria (refer to Table 2).

Of them, a total of 1.1 million visitors (international and domestic overnight and daytrip visitors) to the State cycled while on their trip\* (accounting for 1.6% of the total visitation to the State).

**Table 2: Total visitation to Victoria (year ending December 2015)**

Total visitors (000s)	Total visitors to Victoria	Cycle tourism visitors to Victoria	(% Cycle share of visitors per row)
<b>Total (international and domestic) visitors</b>	<b>69,945</b>	<b>1,136</b>	<b>1.6%</b>
Total domestic (overnight and daytrip) visitors	67,522	975	1.4%
Total (international and domestic) overnight visitors	24,038	697	2.9%
International visitors	2,423	161	6.6%
Domestic overnight visitors	21,615	536	2.5%
Domestic daytrip visitors	45,907	439	1.0%

Throughout this same period, there was a total of 54.4 million visitors (comprising of international and domestic overnight and daytrip visitors) who visited Victoria for **leisure (comprised of those travelling for a holiday or visiting friends and/or relatives)**, accounting for 78% of total visitation to the State (refer to Table 3).

Of this total, 977,000 were leisure visitors who cycled while on their trip\*, accounting for 1.8% of total leisure visitation to the State.

**Table 3: Total leisure visitation to Victoria (year ending December 2015)**

Leisure visitors (000s)	Total leisure visitors to Victoria	Cycle tourism leisure visitors to Victoria	(% Cycle share of leisure visitors per row)
<b>Total (international and domestic) leisure visitors</b>	<b>54,441</b>	<b>977</b>	<b>1.8%</b>
Total domestic (overnight and daytrip) leisure visitors	52,625	873	1.7%
Total (international and domestic) overnight leisure visitors	18,571	605	3.3%
International visitors	1,816	104	5.7%
Domestic overnight visitors	16,755	501	3.0%
Domestic daytrip visitors	35,870	372	1.0%

Source: National and International Visitor Surveys, year ending December 2015, released March 2015.

\* Please note: international cycle tourists to Victoria did not indicate which state the cycling was undertaken while on their trip to Australia.

### Domestic leisure cycle visitation

In the year ending December 2015, Australia received an estimated 1.5 million **domestic overnight leisure** cycle tourists, accounting for 8.1 million visitor nights. The average length of stay was 5.4 nights (refer to Table 4).

During this same period, Victoria received 501,000 domestic overnight leisure cycle tourists, accounting for 2.1 million visitor nights and equating to an average trip duration of 4.2 nights. Domestic overnight leisure cycle tourists represent 3.0% of total domestic overnight leisure visitors to the State.

There were 1.2 million **daytrips** undertaken in Australia by domestic leisure cycle tourists in the year ending December 2015. Of that, approximately 372,000 daytrips (or 33.2%) were taken to/within Victoria. Domestic daytrip leisure cycle tourists represent 1.0% of total domestic daytrip visitors to the State.

**Table 4: Domestic leisure cycle visitation (year ending December 2015)**

Domestic leisure cycle visitation to Victoria and Australia		
	Victoria	Australia
Overnight Visitors ('000s)	501	1,508
Visitor Nights ('000s)	2,120	8,071
Average length of stay	4.2	5.4
Daytrip Visitors ('000s)	372	1,151

### International leisure cycle visitation

In the year ending December 2015, 247,000 **international overnight leisure** cycle tourists travelled to Australia, accounting for 15.0 million nights. Of these visitors, 42.2% visited Victoria during this period (equating to 104,000 international overnight leisure cycle tourists and 3.0 million nights) (refer to Table 5).

International overnight leisure cycle tourists represent 5.7% of total international overnight leisure visitors to the State.

The average length of stay for international overnight leisure cycle tourists in Australia was 60.6 nights compared to an average length of 28.8 nights in Victoria.

**Table 5: International leisure cycle visitation (year ending December 2015)**

International leisure cycle visitation to Victoria and Australia		
	Victoria	Australia
Overnight Visitors ('000s)	104	247
Visitor Nights ('000s)	2,994	14,957
Average length of stay	28.8	60.6

Source: National and International Visitor Surveys, year ending December 2015, released March 2015.

\* Please note: international cycle tourists to Victoria did not indicate which state the cycling was undertaken while on their trip to Australia.

## Activities undertaken by cycle tourists to Victoria

Activities that were undertaken by cycle tourists to Victoria are shown in Tables 6-8 (overleaf).

In the three years ending December 2015, **domestic overnight leisure** cycle tourists to Victoria undertook a range of activities and the top five activities (in addition to cycling) included eating or dining at a restaurant or café (65%), visiting friends and relatives (45%), sightseeing (40%), going to the beach (40%) and shopping (31%) (refer to Table 6 overleaf). Compared to the general domestic overnight population, domestic overnight leisure cycle tourists were more inclined to have undertaken surfing (three times more than the average population), water activities or sports, bushwalking, attending picnics or BBQ's (all two times more than the average domestic overnight visitor population) in Victoria.

In the four years ending December 2015, **domestic daytrip leisure** cycle tourists to Victoria undertook a fewer number of activities than the overnight leisure cycle tourists (unsurprisingly, due to the length of stay). The top activities (in addition to cycling) were much the same as domestic overnight leisure cycle tourists (that is eating or dining at a restaurant or café (52%), visiting friends and relatives (21%) and sightseeing (18%)) (refer to Table 7 overleaf). Compared to the general domestic daytrip visitor population, domestic daytrip leisure cycle tourists to Victoria were three times more likely to visit a national park or two times more likely to go bushwalking.

In the year ending December 2015, **international overnight leisure** cycle tourists to Victoria undertook a range of activities within their trip\* (and this was substantially more than the other types of visitors due to their extended length of stay). The top activities that were undertaken (in addition to cycling) were eating or dining at a restaurant or café (97%), sightseeing (89%), going to the beach (86%), shopping (85%) and going to the markets (75%) (refer to Table 8 overleaf). Relative to the general international overnight visitor population, cycle tourists (from overseas) were four times more likely to go surfing and three times more likely to go sailing, windsurfing and kayaking.

Source: National and International Visitor Surveys, year ending December 2015, released March 2015.

\* Please note: international cycle tourists to Victoria did not indicate which state the cycling was undertaken while on their trip to Australia.

**Table 6: Top ranked activities undertaken by domestic overnight cycle tourists to Victoria (3 years ending December 2015)**

Top ranked activities performed by Domestic overnight cycle tourism visitors to Victoria	Domestic overnight cycle tourism visitors ('000s)	% of cycle visitors undertaking activity	Index compared to total domestic overnight visitors
Cycling	1,288	100%	3,669
Eat out / dine at a restaurant and/or cafe	831	65%	108
Visit friends & relatives	575	45%	81
Sightseeing/looking around	509	40%	141
Go to the beach	515	40%	184
Go shopping for pleasure	396	31%	105
Bushwalking / rainforest walks	335	26%	219
Pubs, clubs, discos etc	313	24%	111
Visit national parks / state parks	248	19%	186
Go to markets	224	17%	124
Picnics or BBQs	199	15%	214
Go on a daytrip to another place	121	9%	160
Visit wineries	109	8%	191
Visit museums or art galleries	95	7%	86
Fishing	102	8%	145
Exercise, gym or swimming	96	7%	179
Visit botanical or other public gardens	82	6%	122
Other outdoor activities (no further details)	80	6%	198
Water activities / sports	81	6%	220
Attend festivals / fairs or cultural events	74	6%	143
Visit history / heritage buildings, sites or monuments	68	5%	103
Golf	63	5%	192
Surfing	69	5%	320
Play other sports	54	4%	109
Attend movies/cinema	52	4%	169

**Table 7: Top ranked activities undertaken by domestic daytrip cycle tourists to Victoria (4 years ending December 2015)**

Top ranked activities performed by domestic daytrip cycle tourism visitors to Victoria	Domestic daytrip cycle tourism visitors ('000s)	% of cycle visitors undertaking activity	Index compared to total daytrip visitors
Cycling	1,152	100%	12,175
Eat out / dine at a restaurant and/or cafe	599	52%	114
Visit friends & relatives	239	21%	46
Sightseeing/looking around	203	18%	104
Visit national parks / state parks	168	15%	301
Go shopping for pleasure	134	12%	57
Go to the beach	150	13%	115
Bushwalking / rainforest walks	120	10%	225

Source: National and International Visitor Surveys, year ending December 2015, released March 2015.

\* Please note: international cycle tourists to Victoria did not indicate which state the cycling was undertaken while on their trip to Australia.

\*\*Shading corresponds to the level at which cycle tourists are undertaking activities relative to the general population – the activities that cycle tourists are more likely to undertake relative to the general population are intensely-shaded.

**Table 8: Top ranked activities undertaken by international overnight cycle tourists to Victoria (year ending December 2015)**

Top ranked activities undertaken by international overnight cycle tourism visitors to Victoria	International overnight cycle tourism visitors ('000s)	% of cycle visitors undertaking activity	Index compared to total international overnight visitors
Cycling	104	100%	1,739
Eat out / dine at a restaurant and/or cafe	101	97%	103
Sightseeing/looking around	93	89%	111
Go to the beach	89	86%	129
Go shopping for pleasure	88	85%	99
Go to markets	78	75%	124
Visit national parks / state parks	73	70%	127
Visit botanical or other public gardens	72	69%	130
Pubs, clubs, discos etc	71	68%	188
Visit history / heritage buildings, sites or monuments	65	63%	137
Visit museums or art galleries	64	62%	139
Visit wildlife parks / zoos / aquariums	56	53%	125
Bushwalking / rainforest walks	55	53%	180
Charter boat / cruise / ferry	47	45%	165
Attend Movies/Cinema	42	40%	260
Attend festivals / fairs or cultural events	40	39%	258
Tourist trains	37	36%	141
Attend theatre, concerts or other performing arts	34	32%	225
Go on guided tours or excursions	34	32%	135
Visit wineries	33	32%	152
Visit farms	30	29%	146
Visit casinos	30	29%	138
Snorkelling	28	27%	215
Experience aboriginal art / craft and cultural displays	27	26%	231
Visit the outback	24	23%	224
Visit art / craft workshops / studios	22	21%	213
Visit amusements / theme parks	22	21%	136
Other outdoor activities (no further details)	21	21%	291
Surfing	21	20%	424
Sailing, windsurfing, kayaking	21	20%	333
Attend an organised sporting event	19	18%	213
Go whale or dolphin watching	19	18%	201
Play other sports	16	15%	248
Visit an aboriginal site / community	15	14%	223
Scuba diving	12	11%	205
Fishing	12	11%	273
Visit a health spa / sanctuary / well-being centre	11	10%	203
Attend aboriginal performance	8	8%	148
Golf	5	5%	236

Source: National and International Visitor Surveys, year ending December 2015, released March 2015.

\* Please note: international cycle tourists to Victoria did not indicate which state the cycling was undertaken while on their trip to Australia.

\*\*Shading corresponds to the level at which cycle tourists are undertaking activities relative to the general population – the activities that cycle tourists are more likely to undertake relative to the general population are intensely-shaded.