

Bike tourism opportunities
in Queensland

Supplementary report:

Road Cycling

Supplemental to *Bike Tourism in
Queensland* — Research Report



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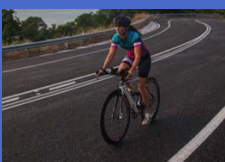
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Key bike tourism opportunities

Bike tourism – or bike riding on leisure trips – is a popular activity enjoyed by many, and can be a powerful reason to choose to visit a destination. Bike riding also delivers a more positive in-destination experience for visitors, leading to repeat visitation and recommendations to family and friends.

There are many types of bike riding, however there are four key opportunities for Queensland:

 <p>Trail riding</p>	<p>Riding a dedicated path or trail through a scenic location. The surface – paved, dirt, gravel – doesn't matter, as long as it is separated from traffic. Includes single day and multi-day rides.</p> <p><i>Example: Brisbane Valley Rail Trail</i></p> <p>588,000 adults went trail riding while on a trip in the last 12 months.</p>
 <p>Mountain biking</p>	<p>Riding bikes on single off-road tracks, usually graded green (easiest) through to double black (extreme).</p> <p><i>Example: Nerang National Park Trails</i></p> <p>177,000 adults went mountain biking while on a trip in the last 12 months.</p>
 <p>Holiday riding</p>	<p>Casual bike riding experiences, usually done spontaneously. Holiday riding is an activity done in a destination.</p> <p><i>Example: Riding along the Cairns Esplanade</i></p> <p>1.2 million adults went holiday riding while on a trip in the last 12 months.</p>
 <p>Road cycling</p>	<p>Riding road bikes on the road.</p> <p><i>Example: The Gap to Mount Glorious (via Mt Nebo)</i></p> <p>323,000 adults went road cycling while on a trip in the last 12 months.</p>

Note: Individuals can participate in multiple types of riding.

This report supplements *Bike Tourism in Queensland – Research Report*. It provides detailed data about the road cycling market, traveller motivations and behaviours.







Road cycling

- Road cycling is more than just something fun to be done on holidays. Road cycling has its own sub-culture, its own language, and people identify as road cyclists. More than five in six road cyclists are cycling weekly and would like to do more.
- Participation events are key for road cycling travel. More than one in three road cycling trips are to participate or train for an event.
- Even among road cyclists, vehicles are an issue. One in three cited traffic and safety fears on their last trip.
- Road cyclists will consider Australian destinations for their travels, however no one destination dominates. There is a gap in the market for a strong road cycling destination.
- The biggest challenge with road cycling is destination development. Ideally, road cyclists are seeking smooth, debris clear roads, with wide shoulders through scenic locations. They also prefer it if they are secondary roads with minimal traffic.
- Road cyclists have strong interest in other types of riding, in particular trail riding (either single day or multi-day). Destinations will be able to attract these same visitors with trail riding experiences.
- Despite the challenges, road cycling is a very attractive and valuable market, driven by large participant numbers and high average spend.





What is the market?

Road cycling

 Biked on a trip (# people)	323,000
 Day trip (50+km) expenditure	\$635 million
 Overnight visitor expenditure	\$503 million

 Queensland market	Number of trips	Overnight visitor expenditure
Queenslanders in Queensland	63,000	\$38 million
Queenslanders travelling interstate	43,000	\$86 million
Interstate visitors to Queensland	44,000	\$86 million

AVERAGE SPEND PER PERSON PER NIGHT
 \$92 intrastate \$127 interstate

	 Day trips (50+km)	Overnight trips		
		 Intrastate	 Interstate	 Overseas
Participation (% of population)	1.9%	0.8%	0.6%	0.3%
Participation (# people)	284,000	125,000	83,000	44,000
Average # of trips	14.4	1.0	0.5	0.3
Total # of trips	4.6M	325,000	156,000	112,000
Average spend per trip	\$137	\$600	\$1,980	n/a

4.5 million people
 people find road cycling appealing
 (30% of adults)

This includes
1.1 million
 who find it very appealing



Who is the market?

Profile of road cyclists



Intrastate travel 53%
Interstate travel 59%



Intrastate travel 46%
Interstate travel 41%

Age Total	Total	Intrastate	Interstate
18 to 24 years	3%	1%	0%
25 to 29 years	7%	7%	1%
30 to 34 years	7%	19%	8%
35 to 39 years	10%	13%	15%
40 to 44 years	8%	8%	2%
45 to 49 years	12%	3%	13%
50 to 54 years	15%	16%	11%
55 to 59 years	11%	14%	16%
60 to 64 years	12%	18%	10%
65 to 69 years	12%	1%	19%
70+ years	4%	1%	4%

Household structure	Total
Living alone	16%
A couple with children at home	26%
A couple without children at home	40%
Single with children at home	1%
Shared household of adults	8%
A shared household of family	6%
Other/prefer not to say	3%



- Result is significantly below the total
- Result is significantly above the total

* High Value Travellers engage in domestic leisure (holiday or visiting friends and relatives) travel, spend more than average on leisure trips, and are interested in the type of leisure experiences Queensland has to offer.

Please note if percentages do not add up to 100% it is due to rounding, not missing responses.

Household income	Total	Intrastate	Interstate
Under \$49,999	11%	4%	14%
\$50,000 - \$59,999	3%	0%	5%
\$60,000 - \$69,999	9%	22%	15%
\$70,000 - \$79,999	8%	9%	6%
\$80,000 - \$89,999	7%	3%	11%
\$90,000 - \$99,999	4%	6%	5%
\$100,000 - \$109,999	9%	3%	5%
\$110,000 - \$119,999	4%	1%	6%
\$120,000 - \$129,999	8%	4%	4%
\$130,000 - \$139,999	3%	0%	1%
\$140,000 - \$149,999	5%	9%	1%
\$150,000 - \$199,999	12%	9%	7%
\$200,000 - \$249,999	7%	10%	7%
\$250,000+	11%	21%	12%
Prefer not to say	0%	0%	1%

Understanding the market

Frequency of road cycling

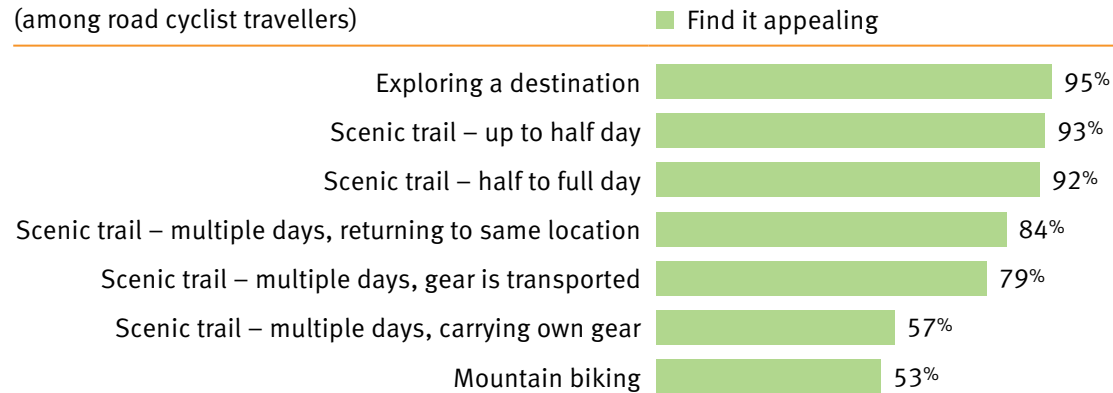
More than once a week	73%
Once a week	12%
A few times a month	9%
About once a month	1%
Once every two to three months	4%
Less often	0%



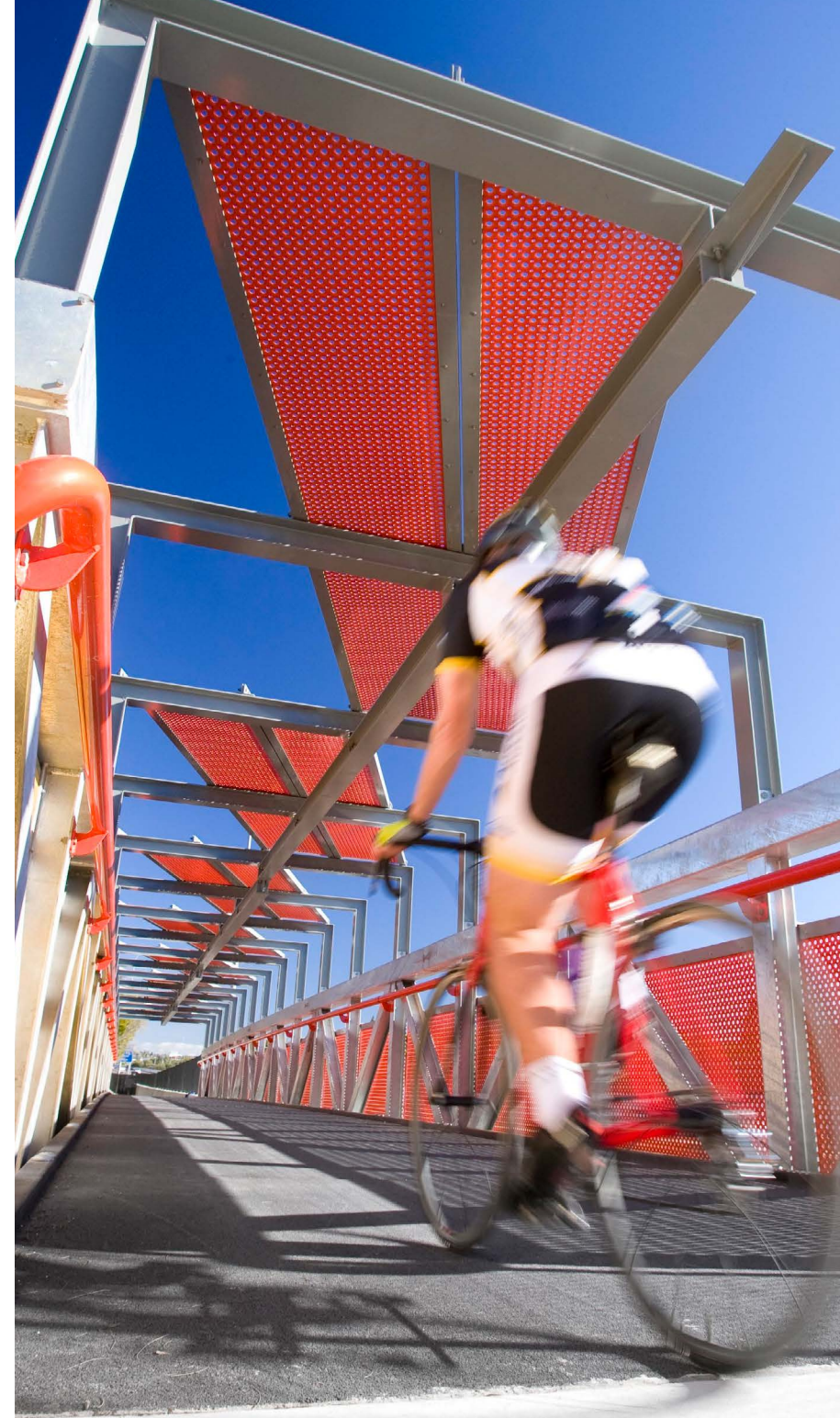
Those who travel are very frequent road cyclists. More than five in six are road cycling once a week, including three in four who are riding more than once a week.

Appeal of different types of riding

(among road cyclist travellers)



Road cycling travellers find other types of riding very appealing. Exploring a destination by bike, and single day scenic trail rides are very appealing. Even mountain biking appeals to more than one in two.

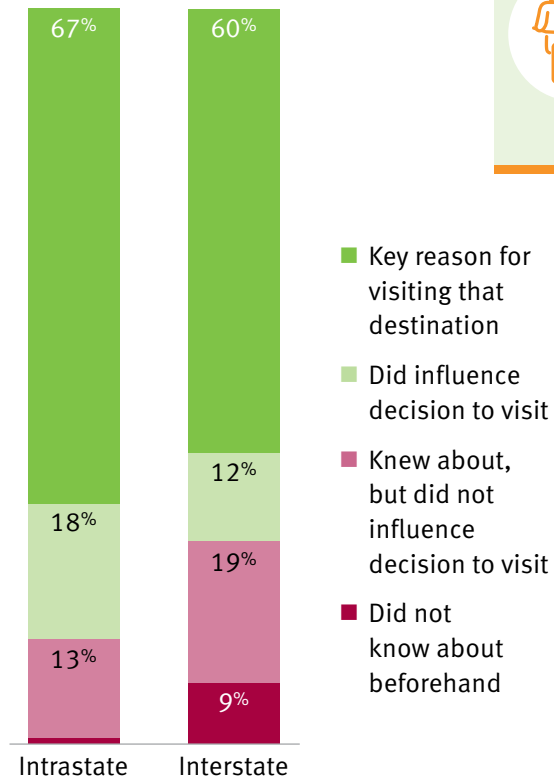


Where do they travel?

Destination of last trip

	Intrastate	Interstate
Queensland	31%	28%
New South Wales	21%	20%
Victoria	48%	19%
South Australia	-	13%
Western Australia	-	12%
Northern Territory	-	0%
Tasmania	-	5%
Canberra and ACT	-	3%

Impact on destination choice



For more than one in four interstate road cycling trips, the riding was secondary. It did not impact their choice of destination.

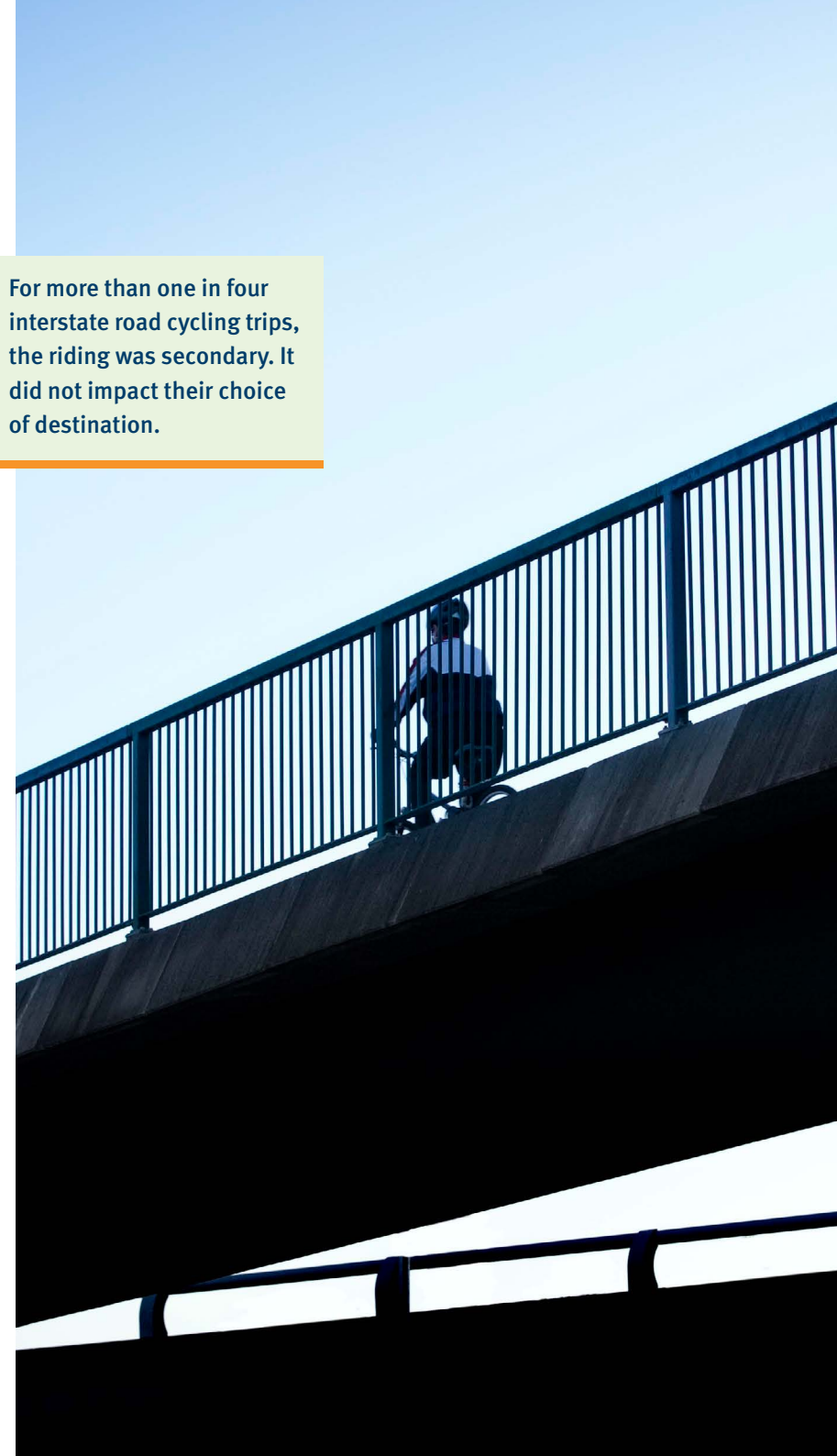
- Key reason for visiting that destination
- Did influence decision to visit
- Knew about, but did not influence decision to visit
- Did not know about beforehand

How they choose where to travel

There is strong consideration of Australian destinations for road cycling trips, however no one destination dominates.



There is a gap in the market



How do they travel?

Total number of nights away on trip

	Total	Intrastate	Interstate
1 night	16%	38%	1%
2 nights	14%	25%	6%
3 nights	18%	8%	24%
4 nights	10%	15%	7%
5 nights	3%	1%	5%
6 nights	7%	10%	5%
7 to 13 nights	14%	3%	20%
14 nights or more	19%	0%	31%

Travel mode

	Total	Intrastate	Interstate
Fly	29%	15%	39%
Drive	62%	72%	55%
Other	9%	13%	6%

□ Result is significantly below the total

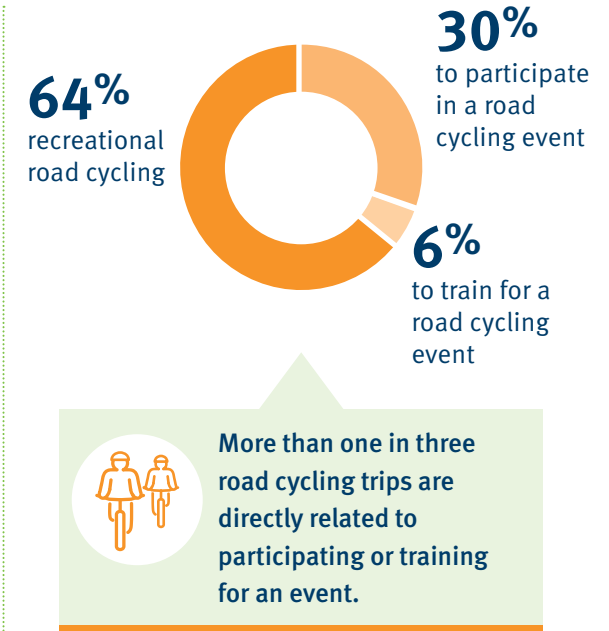
□ Result is significantly above the total

Total number of days biking

	Total	Intrastate	Interstate
1 day	19%	37%	6%
2 days	29%	33%	25%
3 days	13%	8%	17%
4 days	13%	15%	11%
5 days	1%	0%	2%
6 days	2%	5%	0%
7 to 13 days	13%	2%	20%
14 days or more	11%	0%	19%

Travel party

	Total	Intrastate	Interstate
Solo trip	23%	36%	14%
Partner / spouse	31%	24%	41%
Children under 18	5%	6%	9%
Children over 18	2%	7%	0%
Other family	5%	17%	4%
Friends	41%	26%	45%
Colleagues	2%	6%	0%
Other	7%	3%	9%

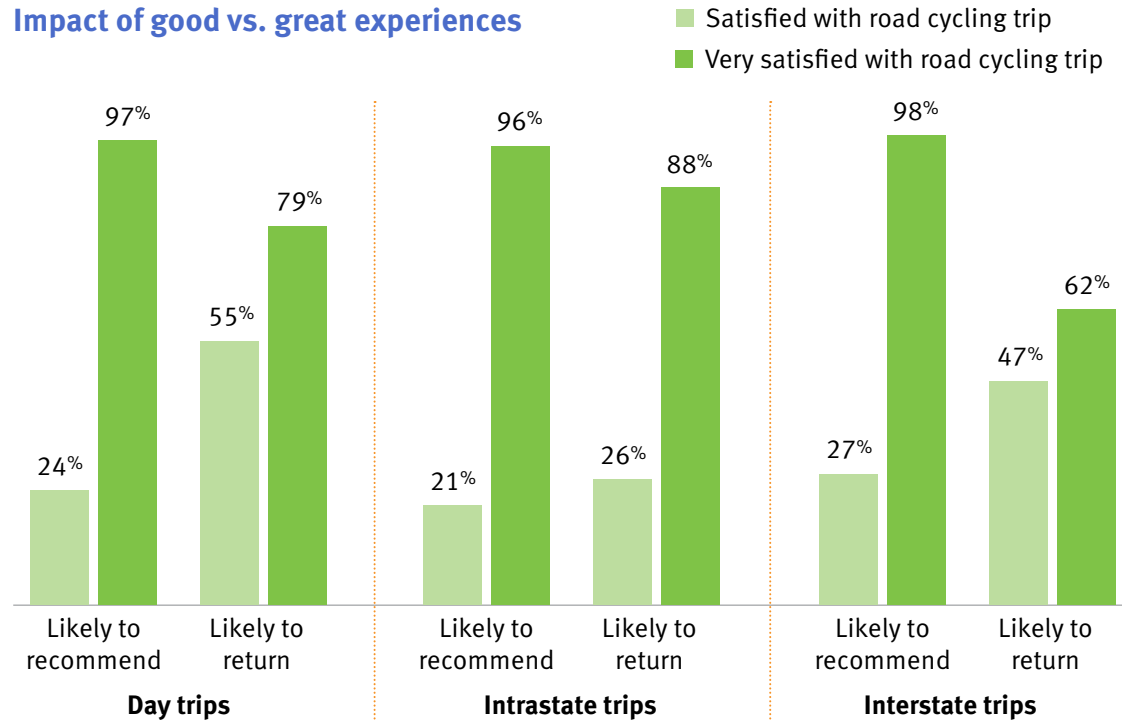


What makes a successful destination?

An ideal destination will tick *all* the boxes

- ✓ Quality infrastructure: smooth, debris clear roads
- ✓ Wide shoulders
- ✓ Minimal traffic (ideally secondary roads, not major thoroughfares)
- ✓ Scenery
- ✓ Complementary experiences; especially food and wine
- ✓ Positive cycling culture

Impact of good vs. great experiences



Even among road cyclists, vehicles are an issue. One in three cited traffic and safety fears on their last trip.

