



Cycle Tourism in Australia:

An investigation into its size and scope

February 2006

Ms Pam Faulks
Dr Brent Ritchie
Dr Martin Fluker



Table of Contents

1. Executive Summary	1
2. Introduction.....	3
3. Facilitators of Cycle Tourism.....	3
3.1 Cycle Participation.....	3
3.2 Bike Sales	4
3.3 Organisation and Agency Facilitators.....	5
4. Scope and Nature of Cycle Tourism.....	9
4.1 Defining Cycle Tourism.....	9
4.2 Size and Value of Cycle Tourism Internationally	11
5. Potential Benefits of Cycle Tourism.....	12
5.1 Potential Economic Benefits.....	12
5.2 Potential Social Benefits	13
5.3 Potential Environmental Benefits.....	14
6. A National Snapshot.....	15
7. Regional and Local Data in Australia	18
7.1 Touring.....	18
7.1.1 Commercial Cycle Tours	18
7.2 Independent Travellers.....	18
7.2.1 Rail Trails	19
7.2.2 Cycle Networks and Trails	20
7.3 Community Cycling Events.....	21
7.3.1 Multi-Day Rides	21
7.3.2 One-Day Rides.....	25
7.3.3 Cycling Festivals	26
7.4 Mountain Biking	28
7.4.1 Multi-Day Mountain Bike Events.....	28
7.4.2 Independent Mountain Biking.....	30
7.5 Competition	31
7.5.1 Competition - Road and Track Cycling	31
7.5.2 Competition - Mountain Biking.....	32
8. Conclusion and Recommendations	33
9. Bibliography.....	36
10. Appendix A – Tour Operators	41
11. Appendix B – List of Rail Trails.....	42
12. Appendix C – Location of Rail Trails	45
13. Appendix D – Events.....	49

List of Tables

Table 1. Participation rate by gender and state/territory	4
Table 2. Bikes Imported into Australia 2000-2004	5
Table 3. Cycling Associations and Organisations	6
Table 4. Factors to Facilitate Cycle Tourism Experiences	8
Table 5. Different Segments and Characteristics of10 Recreational Cyclists and Bicycle Tourists	10
Table 6. Scale and Value of Bicycle Tourism in Various Countries	12
Table 7. Comparison of Characteristics of Cycle Tourist with All Tourists	16
Table 8. Estimated Domestic Cycle Tourist Expenditure 2004/2005	17
Table 9. Economic Impact Estimates of Major Cycle Tourism Events.....	22
Table 10. Attendance at Jacob's Creek Tour Down Under 2003-2005	31

List of Figures

Figure 1. Cycling participation by age.....	4
Figure 2. Activities on last trip by cycle tourists and all tourists.....	15
Figure 3. The Tasmanian Trail.....	21
Figure 4. 2005 Great Victorian Bike Ride	23
Figure 5. 2005 Cycle Queensland Route	23
Figure 6. Participants in the Great Tasmanian Bike Ride.....	24
Figure 7. 2006 NSW Big Ride Route	24
Figure 8. Evandale Village Fair	27
Figure 9. Penny Farthing Championships, Evandale.....	27
Figure 10. Cycle Epic Participation Numbers 2003-2005	29
Figure 11. 2005 Cycle Epic Event Specific Spending	30
Figure 12. Cycle Epic Travel and Accommodation.....	30

1. Executive Summary

A Sustainable Tourism CRC scoping study was undertaken over a short time frame to investigate the size and scope of cycle tourism in Australia. The report indicates that:

- Interest is growing in cycling due to an increase in cycle participation and bike sales coupled with an interest in cycle tourism from cycling, tourism and government agencies at the regional and local level;
- In the United Kingdom 2 per cent of all leisure/day trips and 1 per cent of all holiday trips are generated by cycling, while in Ireland 9 per cent of all overseas visitors are considered cycle tourists spending on average £538 each. In New Zealand it has been estimated that 3 per cent of overseas tourists and 1.6 per cent of domestic holiday makers cycle between destinations in the South Island worth \$72 million per annum to the economy;
- Although some data exists at a national level on the size and scope of cycle tourism, it covers domestic cycle tourists only and is limited in that it does not include all segments of cycle tourism. Therefore, it is difficult to adequately quantify the size and scope of this market in Australia;
- From available data, domestic cycle tourists are very active travellers, with strong destination familiarity, more likely to camp or stay with friends and relatives and more likely to travel intrastate for an average of 16 days. Their average daily spend is slightly higher than domestic visitors overall but nearly five times as high as their overall trip spend. An estimate based on their spending is made of approximately \$213 million per annum;
- No data exists concerning international cycle tourists, and data provided by commercial tour operators suggests that at present this market is very small, indicating that the major international market is comprised of independent cycle tourists;
- Regional and local data are also lacking on cycle tourism, with the majority of data consisting of cycling events. This data is usually undertaken by cycling event organisers and appears to lack large sample sizes and comparability across regions due to the application of different methodologies. Estimates based on Roy Morgan cycle tourism expenditure and the BTR regional tourism expenditure estimate between approximately \$1.2 million and \$4.5 million for each big bike race in Australia;
- Data provided on the potentially largest segment of cycle tourism (touring) can be gathered at regional or local cycling routes and trails, but again very little research has been conducted. Research that has been conducted is usually on trail users (with cycle tourists comprising one type of user) making it difficult to accurately estimate the size and scope of the market;
- The report notes that cycle tourism has great potential, especially for regional and rural destinations and makes the following research recommendations to

more adequately estimate the size and scope of cycle tourism and quantify its potential:

- To develop a consistent definition and outline of market segments at a national, regional and local level so data can be comparable;
- Data need to be gathered on the size and scope of international cycle tourists (with cooperation from commercial tour operators) and regional and local trail/route research;
- Data need to be gathered on the size and scope of domestic cycle tourism (possibly through examining Roy Morgan data) including the size of key market segments currently masked by the data;
- Data are required on local and regional trail usage by market segment supplementing national research. This should also include economic impact data which could then be applied across trails providing estimates for decision making;
- That cycling tourism events apply consistency to event evaluations and make it clear who or what is included in such analysis;
- A latent demand model should be developed to examine whether infrastructure development can overcome constraints to cycle tourism participation. This could be useful for cost/benefit analyses for proposed cycle routes or infrastructure;
- Resource audits should be undertaken to identify suitable routes and help identify what investment in product development is required prior to marketing such routes to cycle tourists.

2. Introduction

Cycle tourism is a growing and important niche tourism market that has the potential to provide a range of economic social and environmental benefits to regional areas and the wider community (Lumsdon, 1996 and 2000; Ritchie, 1998; Tourism Australia, 2005). However, despite this the development of cycle tourism in Australia has been hindered by a lack of research and understanding. In some European countries, such as the United Kingdom, France and Denmark, cycling trail and route development have helped stimulate the demand for cycling trips and holidays. Nevertheless, product development and marketing of cycle tourism has been based on research conducted on the size and scope of cycle tourism at a national, regional and local level (see Cushing, 1997; Cope and Doxford, 1997). Furthermore, cycling routes and cycle tourism developments in Europe have been integrated into sustainable development and transport policies leading to the development of well planned regional, national and pan-European networks.

However, in Australia research concerning cycle tourism is scarce potentially inhibiting the development and marketing of cycle tourism domestically and internationally. Despite the growth of bicycle sales, an increase in cycling participation and an increase in active holidays, government and industry in Australia have been slow to realize the potential of cycle tourism compared to European countries.

This report attempts to provide an indicative estimate of the size and scope of cycle tourism. First, the report outlines the key facilitators of cycle tourism before outlining the market segments that can be considered part of cycle tourism, and provides an analysis of the size and scale of cycle tourism internationally. The report then outlines the potential economic, social and environment benefits for Australia based on previous international research. The report then outlines the potential size and scope of market segments from published and unpublished data gathered from tour operators, event organisers, cycling organisations and industry associations. It ends with a conclusion and recommendations. It should be noted that this report was undertaken under a short timeframe and therefore there may be some gaps in the data and information presented.

3. Facilitators of Cycle Tourism

3.1 Cycle Participation

Research undertaken by the Australian Sports Commission (2005a) indicates that 10.5 per cent of Australians participate in cycling, and that cycling has been consistently ranked fourth in type of physical activity participation rates. More importantly, between 2001 and 2004, the number of people participating in cycling increased by 15.3 per cent. There is some distinction, however, between competitive and social cycling, with the Australian Sports Commission noting that while there is large community participation in the activity of cycling, the sport of cycling has a relatively low membership rate (Australian Sports Commission, 2005b).

When cycling participation is segmented by gender, it becomes apparent that cycling is more popular with men than it is with women. While 14.0 per cent of men indicated that they participate in cycling (increasing its participation ranking to third),

only 7.1 per cent of women indicated that they participated in cycling (with the ranking dropping down to fifth place). The breakdown of participation by gender and state and territory is provided in Table 1 and illustrates that the Northern Territory and the Australian Capital Territory have both the highest participation rates for women, as well as overall participation rates.

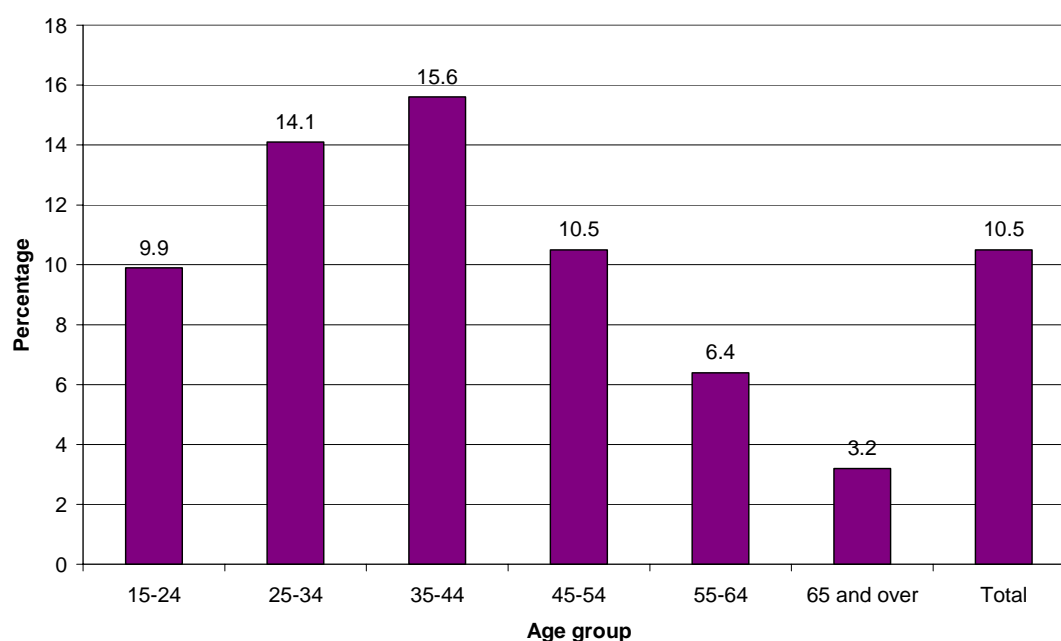
Table 1. Participation rate by gender and state/territory

	ACT %	NSW %	NT %	QLD %	NT %	TAS %	VIC %	WA %
Male	21.3	12.4	20.8	11.3	12.4	13.7	15.6	19.6
Female	11.3	5.9	14.5	7.9	5.7	6.0	7.6	8.0
Total	16.2	9.1	17.8	9.6	9.0	9.7	11.6	13.8

Source: Australian Sports Commission (2005a).

The Australian Sports Commission also provides details of cycling participation by age. As illustrated in Figure 1, cycling is most popular with those in the 35-44 year age group (15.6%) and least popular with those 65 years and over (3.2%).

Figure 1. Cycling participation by age



Source: Australian Sports Commission (2005a).

Research undertaken into the motivations of cyclists indicates that the majority of cyclists cycle for fun/leisure (86%), while less than one quarter of cyclists (24%) ride for transportation (Bicycle Victoria, in Australian Bicycle Industry, 2004).

3.2 Bike Sales

Bike sales can also be seen as a reflection of Australians' interest in cycling. Although there are plans to improve the way statistics on the bicycle industry are collected, measuring the number of bike sales in Australia is at present undertaken by

keeping track of the number of new bikes imported into Australia each year (Australian Bicycle Industry, 2005).

Table 2 provides data on the number of bikes imported to Australia between 2000 and 2004 and shows that in 2004 there was an increase of 20 per cent over 2003 figures.

Table 2. Bikes Imported into Australia 2000-2004

Year	Number of bikes imported into Australia
2000	926,924
2001	774,938
2002	1,109,736
2003	1,003,844
2004	1,247,991

Source: Australian Bicycle Industry (2004).

3.3 Organisation and Agency Facilitators

A number of organisations have noted the trends suggesting the potential of cycle tourism and its potential benefits (discussed in Section 5). Such organisations have the ability to facilitate the growth of cycle tourism through lobbying and policy making. Organisations include cycling associations and industry groups, tourism industry and organisations, local government and State/Territory transport, regional development and tourism agencies.

Cyclists in Australia are served by a range of associations and organisations. Table 3 provides an overview of the activities and membership of some of Australia's primary cycling associations and organisations. This should not be seen as an exhaustive list of cycling organisations, or of the activities of the organisations listed. The table illustrates the potential number of people who may have an interest in cycling for leisure and tourism purposes. Furthermore, it should be noted that more recently the bicycle industry and cycling organisations have realized the potential of cycle tourism and taken a lead role in trying to develop a coherent and organized approach to its development and marketing through the establishment of the Australian Centre for Excellence for Cycle Tourism (now called Cycling Tourism Australia).

The Centre aims to create *“an environment allowing cycling to become a high yield quality tourism niche market in Australia, benefiting regional economies and creating healthier, active communities”* (Australian Centre for Excellence in Cycle Tourism, 2005) and is an initiative of Bicycle SA, the Cycling Promotion Alliance and the Bicycle Federation of Australia. However, the Centre attempts to bring together the cycling industry and associations (such as the groups in Table 3) with tourism development and promotion bodies at a national, regional and local level.

Table 3. Cycling Associations and Organisations

Organisation	Role/Activities	Membership
Bicycle Federation of Australia	▪ Peak body for non-competitive cyclists	Represents over 20,000 cyclists through member organisations
Bicycle Transport Alliance	▪ Cycling advocacy non-profit organisation based in Perth, WA	538 members
Bicycle Institute of South Australia	▪ Established in 1974 ▪ Advocates for safe and pleasant cycling environment in SA	Approx. 700 members
Bicycle South Australia	▪ Peak body for recreation cyclist in SA ▪ Be Active Tour ▪ Savings and Loans Coast to Coast and Mini Coast to Coast ▪ Dirty Weekend ▪ Easter Cycle ▪ Fat Tyre Festival ▪ Annual Tour ▪ Grand Slam Festival ▪ Track and Trail Festival ▪ Wolf Blass Sea to Vines ▪ World Solar Cycle Challenge	
Bicycle NSW	▪ Publishes <i>Australian Cyclist</i> magazine six times per year, with a circulation of over 12,000 copies each issue. ▪ NSW Big Ride	Approx. 10,500 members and over 50 affiliated community-based Bicycle User Groups
Bicycle Queensland	▪ Cycle Queensland ▪ Brisbane to Gold Coast 100km Cycle Challenge	Over 5,000 members
Bicycle Tasmania	▪ Bicycle advocacy group ▪ Tasmanian State Bike Week	Approx. 60 members
Bicycle Victoria	▪ Great Victorian Bike Ride ▪ Great Tasmanian Bike Ride (2004) ▪ Great West Australian Bike Ride (2006)	Over 40,000 members
Pedal Power ACT	▪ Cycling body for ACT and the region ▪ Organises regular training rides ▪ Community events of inaugural Brindabella Challenge	Approx. 1,500 members
Cycling Promotion Fund	▪ Established 1999 ▪ Bicycle Industries Australia initiative ▪ Promotes benefits of cycling	
Cycling Promotion Alliance	▪ Brings together the different cycling sectors in Australia ▪ Lobbies government for greater support for cycling	National cycling and retail bodies; state cycling organisations
Cycling Australia	▪ Peak body for the sport of cycling	
Mountain Bike Australia	▪ National mountain bike governing body ▪ Affiliated with Cycling Australia	
Australian Veteran Cycling Council	▪ Affiliated with International Cycling Federation ▪ National and state championships	Approx. 2,000 members

At a regional level groups such as the Hunter Cycling Network have formed to help improve the conditions for cyclists in the Hunter Region of NSW. Their vision is to create “*a world class cycling experience in the Hunter, through a network of shared paths show-casing an attractive region and providing access for all tourism, transport, recreation, health and education opportunities*” (Hunter Cycling Network, 2005: i). As part of that vision they have commissioned a study to examine the potential of cycle tourism in the region. They also note the lack of data on cycle tourism and propose regional survey research to deal effectively with this issue.

At a local level, local governments are also examining cycling as a tool for sustainable transport, recreation and tourism. Local government are able to develop strategies and policies to help facilitate cycle tourism through the development of bicycle plans, infrastructure developments such as rail trails and provide grants for rural cycle tourism businesses. For instance, the Hunter Cycling Network identified Newcastle City Council as the only city council actively branding and marketing cycle tourism routes in the Hunter Region.

Wollongong City Council has produced a Draft Bicycle Plan, with one of the listed goals being to improve bicycle tourism opportunities (Wollongong City Council, 2005:8). Apart from the need to further develop the existing cycle ways and improve signage and safety for all cyclists, suggested actions related to cycle tourism include:

- Working with tourism organisations to look at opportunities to promote cycling tourism
- Encouraging and supporting commercial providers to explore opportunities to promote cycling
- Developing and distributing a bicycle map of Wollongong for on and off road facilities
- Identifying opportunities to develop and promote attractions for visitors on key trails
- Providing suitable car parking facilities at the start and finish of selected recreation trails
- Providing adequate access to water, toilets, seating and rest facilities along recreation trails.

Cycle tourists have needs and requirements that, although not exclusive to cycle tourism, would facilitate cycle tourism activities, particularly in relation to cycling in rural and regional Australia. Primarily, cycle tourists need a safe environment in which to ride, with research indicating that cycle tourists generally prefer quiet roads or designated shared paths (Lumsdon, 1996; Hunter Cycling Network, 2005). In addition to this basic necessity, there are a range of other aspects that can facilitate cycle tourism, which are outlined in Table 4. These factors suggest the need for coordination and cooperation between the large number of stakeholders including the bicycle and tourism industry as well as tourism and cycling industry organisations, such as those discussed above. Furthermore, as the Hunter Cycling Network (2005) study illustrated, coordination is also required between local, regional and state government authorities in both developing and linking cycle tourism strategies and policies to other policy areas (such as health and sustainable transport).

Table 4. Factors to Facilitate Cycle Tourism Experiences

Attractions	Built attractions	<ul style="list-style-type: none"> ▪ Town ▪ Restaurants ▪ Historic sites ▪ Accommodation
	Natural attractions	<ul style="list-style-type: none"> ▪ Scenic views ▪ Forests ▪ Lakes
Information	Maps	<ul style="list-style-type: none"> ▪ Hard copy & electronic ▪ Should include information on ▪ Accommodation ▪ Location of toilets, shops & bike storage ▪ Description of terrain, grading & surface of tracks ▪ Key attractions
	Signage along routes	
Routes	Variety of lengths	<ul style="list-style-type: none"> ▪ Circular or out & back day routes on quiet roads ▪ Overnight trails with various accommodation along route ▪ Longer overnight trails with accommodation and/or facilities ▪ Routes that link sites of geographic, historic & cultural interest ▪ Routes that connect towns or villages
	Variety of terrains	
Public Transport	Transport of bikes required	<ul style="list-style-type: none"> ▪ Trains ▪ Buses ▪ Aeroplanes
Tour companies		<ul style="list-style-type: none"> ▪ Can provide ▪ Guided tours ▪ Transport for gear and luggage ▪ support services, including organising accommodation & meals
Bicycle Hire		<ul style="list-style-type: none"> ▪ Should be available near promoted cycle routes
Accommodation	Cycle friendly accommodation	<ul style="list-style-type: none"> ▪ Can be identified and promoted to potential cycle tourists
Storage and Parking Facilities	Secure storage of bikes and equipment	<ul style="list-style-type: none"> ▪ Cafes and restaurants ▪ Accommodation sites, including campsites & hotels
	Secure car parking	<ul style="list-style-type: none"> ▪ Cafes and restaurants ▪ Accommodation sites, including campsites and hotels

Source: Hunter Cycling Network (2005).

4. Scope and Nature of Cycle Tourism

4.1 Defining Cycle Tourism

Cycle tourism and the cycle tourist have been defined in a number of ways, by both academics and government organisations. For example, the South Australian Tourist Commission (2002) define cycle tourism as “*any holiday or pleasure trip involving a stay away from home of one or more nights on which cycling is undertaken as an activity or is one of the transport modes used*”. The Munda Biddi Trail Foundation (2005), however, propose a broader definition of cycle tourism in that it does not require an overnight stay: “*a recreational visit, either overnight or a day away from home, which involves cycling as a significant part of the visit.*”



Most literature agrees that a traveller must be away from their home destination for at least 24 hours or one night to be considered a tourist (Leiper, 1991; World Tourism Organisation, 1991). Therefore, a *bicycle tourist* has been defined by Ritchie (1998: 568-569) as:

a person who is away from their hometown or country for a period not less than 24 hours or one night, for the purpose of a vacation or holiday, and for whom using a bicycle as a mode of transport during this time away is an integral part of their holiday or vacation. This vacation may be independently organised or part of a commercial tour and may include the use of transport support services and any type of formal and/or informal accommodation.

This definition of a bicycle tourist excludes recreational excursionists who are away from home for less than 24 hours. Therefore, a *recreational cyclist* or *excursionist* should be defined as “*a person involved in any recreational cycling activity or excursion, which is undertaken within a time period not longer than 24 hours or one night from their home destination, and for whom cycling is seen as a positive way of using leisure time*” (Ritchie, 1998:569). Although Ritchie’s (1998) definition appears to be focused on those that are involved in the cycling activity itself he has defined bicycle tourism as any activities, whether cycling or non-cycling, that are undertaken by those who are on vacation for longer than 24 hours, and those who are undertaking an excursion for whom the bicycle is an integral part of their trip (Ritchie, 1999). This includes the market segments outlined in Table 5.

It is clear from Ritchie’s definition and other researchers, as well as those used by both the Munda Biddi Trail Foundation (2005) and the South Australian Tourist Commission (2002), that within the group of tourists labeled as cycle tourists, there are many variations. Although riding a bicycle is a common thread amongst many cycle tourists, cycle tourism could be more broadly defined to include those who participate and watch cycling events away from their home environment. According to Lumsdon (1996) cycling needs to be an integral part of their trip in order to be classified as cycle tourism. Although cycle tourism includes those who use organised tours, according to Beioley (1995), the majority of cycling holidays will be Do-It-Yourself (DIY) or independently organised holidays where people use their own

bikes, plan their own route and book their own accommodation. However, the growth of cycling events (attracting participants and spectators) has often been ignored by researchers possibly because they perceive this particular segment to be sport motivated and not tourism motivated. Nevertheless, these events attract competitors, officials and spectators (both overnight and day excursionists) and have been acknowledged as providing tourism revenue for destinations (see Section 7.3-7.5).

Table 5. Different Segments and Characteristics of Recreational Cyclists and Bicycle Tourists

Activity Type	Segment Types	User Characteristics
Day Touring	-Home Based -Mountain Biker -Day Events	Half day and day trips, primarily from home, families and adult groups, younger mountain bikers.
Cycle Hirers	-Causal -Holidaymakers	Holiday based for whole or part day, experienced and inexperienced cyclists, families and youth groups, some adult groups.
Pre-planned cycle touring	-Independent -Organised	Independent, group led tours, suit inexperienced and overseas visitors, couples, individuals and families, 25-44 age.
DIY touring holidays	-Independent	Touring holidays, more experienced with good knowledge, aged 15-44, couples and adult groups.
Centred holidays	-Independent -Organised	Independent, group led tours from an accommodation base, popular with mountain bikers and younger people.
Cycling events	-Participants and support crews -Spectators	Usually club members depending on type of event (competitive, non-competitive) and supporters.

Source: Adapted from Scottish Tourism Board (1991), Hoyt and Lumsdon (1993) and Beioley (1995).

Some authors believe that cycle tourists are part of a homogeneous group (Simonsen and Jorgenson, 1996). However, although they may be motivated by a common 'special interest' the bicycle tourist includes a wide variety of individuals and potential market segments, such as short break holiday cyclists and longer holiday cyclists, who may be either touring a circuit or staying at a main destination. Therefore, not all cycle tourists are the same, and planners and marketers should not consider them to be the same as they may have different motivations and subsequently may require different types of tourist product and respond to different marketing strategies.

There are a couple of different ways of differentiating cycle tourists:

1. Based on *motivations*. Here a continuum ranging from cycling enthusiast, or hard core cyclist, to occasional cyclist (Simonsen and Jorgenson, 1996) can be considered. For instance, the South Australian Tourist Commission (2002) suggests that cycle tourists can be categorised as being dedicated, interested, or incidental/opportunistic. It notes that individuals are not necessarily confined to one group, as cycling activities might take on different levels of importance for different trips.
2. Based on *activity*. In line with this ability to move from one group to another, cycle tourists could be divided according to the activity in which they

participate. For example, the Mundi Biddi Trail Foundation (2005) divides cycle tourists into four groups: leisure and day cyclists; touring cyclists; mountain bikers; and event cyclists (both competitive and touring).

It should be noted that even within specific activity types different market segments exist, with some commercial touring cycle tourists including camping or ‘hostelling’ (Schieven, 1998). However, other touring cycle tourists may be staying in luxury accommodation with baggage carried for them by tour operators or other service providers. Some may be short break cycle tourists travelling out from a base to explore the countryside, while others may be long stay DIY independent cycle tourists. Appendix A provides a list of some of the tour operators and details on the experiences they offer cycle tourists. Larger flagship routes (such as the C2C route in England and the Taft trail in Wales), according to Lumsdon (1996) and Cushing (1997) consist of around 20 per cent of cycle tourists from organized tours, often suiting those that are not familiar with the country (Scottish Tourist Board, 1991).

While these categories are useful, the motivational classification is difficult as most research tends to use operational definitions based on ‘activity’ and the ‘use of a bicycle within holidays’ to identify the size and scope of cycle tourism. In an attempt to present an indication of the size and scope of cycle tourism in Australia as clearly and as accurately as possible, this report will use the following cycle tourism segments based on activity (although it is acknowledged that there can be overlaps between the different sectors, and we include competitive event participation in this report):

- Touring
- Community cycling events
- Competition
- Mountain Biking.

4.2 Size and Value of Cycle Tourism Internationally

To provide context to the national, regional and local level data in Australia, Table 6 provides figures of the size and scope of cycle tourism in selected countries based on previous research. However, it should be noted that the estimates are based on definitions and market segments for each country and may vary. For instance, the Irish figures are a result of a broad definition, whereas the New Zealand figures are based on independent cycle tourists in the South Island of New Zealand only.

Table 6. Scale and Value of Bicycle Tourism in Various Countries

Country	Numbers	Value
France	-15% of domestic population	-Unknown
Fyn, Bornholm, Denmark	-9% of all foreign tourists -53,000 cycle tourists -477,000 bednights	-3.5% of total tourism turnover
United Kingdom	-2% of all leisure/day trips -1% of all holiday trips	-Leisure day trips (£293 million) -Domestic holidays (£180 million) -Overseas holidays (£60 million)
Ireland	-9% of all overseas tourists	-£538 per person
South Island, New Zealand	-1.6% of domestic holiday-makers -3% of overseas tourists	-\$64 a day per person -\$3021 per person per trip -\$75 million to economy -1472 full time jobs

Source: Carrè (1992), Beioley (1995), Simonsen and Jorgenson (1996), Cushing (1997), Ritchie (1999a).

The figures presented in Table 6 illustrate that cycle tourism is generally a small market segment, but one which has the potential to deliver economic benefits. As the next section of this report notes, the benefits have great potential for rural and regional tourism destinations.

5. Potential Benefits of Cycle Tourism

5.1 Potential Economic Benefits

Apart from individual businesses benefiting from cycling tourism, communities in regional and rural destinations can benefit from this form of tourism. The slow and relaxed pace of bicycle tourism (especially touring) and the location of infrastructure and cycling routes in England have illustrated that cycle route users spend more and stay in serviced accommodation in greater numbers than the average visitor (Countryside Commission, 1997 in Cope *et al.*, 1998). This research also showed that cycle tourism provided important tourism revenues in light of the remote areas where these routes were located (Cope *et al.*, 1998; Cope and Doxford, 1997; Jackson and Morpeth, 1999; Morpeth, 2000). The C2C cycle route in England (a 140 mile route crossing England) in 1996 had 15,000 cyclists who generated £1.5 million over a 3-4 day journey. In the United States Moore *et al.* (1992) demonstrated that between US\$1.2 million and US\$1.8 million was spent on durables, accommodation and food in each of the trail areas. Support services such as bike hire and repair facilities, accommodation and cafes have developed alongside cycling routes in the United Kingdom and United States to service cycle tourists.

The development of cycling infrastructure and routes has provided opportunities for rural communities to diversify and help maintain existing infrastructure (Ritchie, 1999b). Cycle tourism is small scale in nature providing local ownership of facilities and resources compared to mass tourism, reducing the amount of economic leakage from local areas. In New Zealand, Ritchie (1999a; 1999b) discovered that although independent touring cycle tourists generated a lower daily spend compared to all international visitors (\$64 compared with \$152), they have a higher total trip spend

(\$3021 compared with \$2776) due to a longer length of stay. Furthermore, Ritchie (1999a; 1999b) noted that this resulted in \$76 million per annum for the South Island of New Zealand and an estimated 1,472 jobs, mostly in regional areas (which at the time was similar to the size and impact of the cruise ship market). The Central Otago Rail Trail in New Zealand has increased local revenues from businesses by approximately 25% since its inception (Blackwell, 2001). In Britain, estimates of between £535 million per annum and £635 million per annum have been made (Cushing, 1997; Sustrans, 1999).

In Australia it has been suggested that the economic return from the Murray to Mountain Rail Trail to the local economy is around \$2 million per year (Murray to the Mountains Rail Trail Committee of Management, 2005, cited in Hunter Cycling Network: 12). Munda Biddi Trail (WA) estimated that within 5 years 42,000 people will use the trail creating an annual revenue of \$5 million – based on an average stay of 3 days and spending \$40 per person per day on accommodation/food (Munda Biddi Trail Foundation, cited in Hunter Cycling Network: 12).

Other figures indicating the potential economic benefits are located in the following sections of the report outlining regional and local data. However, projections regarding the economic benefits may be ambitious according to Beeton (2003). Beeton (2003) is one of the few studies in Australia which has examined the economic impact of three Victorian rail trails. A total of 89 per cent of her sample cycled these trails and the overall sample generated an average of \$51.10 in expenditure per day or between \$176, \$147 and \$103 in total per trip across the three trails. Beeton (2003) estimates that on this basis trails in Victoria could be responsible for generating over \$10 million per annum in expenditure. Although these figures are comparable with other countries, the cycle tourism expenditure is not disaggregated from the whole sample so it provides only an estimate of the direct economic impact associated with cycle trail use.

5.2 Potential Social Benefits

According to Lumsdon (1996) the provision of safe and attractive cycling routes has stimulated cycle tourism demand and provided opportunities for both locals and tourists. The development of cycle routes for touring have also provided a focus for sustainable development and Local Agenda 21 initiatives in the United Kingdom (Jackson and Morpeth, 1999; Ritchie and Jay, 1999). Although some landowners often express strong concerns about proposed trails for cycling and walking, research has shown that these concerns usually disappear once the trail is developed (Kaylen *et al.*, 1993). Problems that do exist are predictable and able to be alleviated through proper planning and developing positive relations with landowners in the early stages of trail development (Moore *et al.*, 1994).

Community spirit has also been recognized as a potential social benefit of cycle tourism. For instance, in Ireland Jackson and Morpeth (1999) note that the development of cycling routes have facilitated cross border cooperation between the political divisions of the Irish Republic and Northern Ireland, as well as at a regional level. In New Zealand Blackwell (2001) suggested that the Central Otago Rail Trail provided the community with the following social benefits:

- Mental and physical well being such as health, aesthetic appreciation, sense of achievement;

- Learning benefits such as an understanding of what it may have been like to work on the railway;
- Being together as a family;
- Meeting like minded people;
- Bringing 'new faces' into small rural communities, enhancing social interaction;
- Sense of pride and community identity.

The European Cyclists Federation (1998) noted that the spin off effects for the development of cycling events and trails include improved health and fitness and easing traffic congestion. In Australia, Australian Major Events (2004b) suggest that holding a successful international event, such as the Jacob's Creek Tour Down Under, has a positive effect on South Australians generally, and more specifically, the regional communities involved with the event. It also suggests that these events are likely to stimulate greater interest in road cycling, mountain-bike riding and other outdoor activities, with health related spin offs.

5.3 Potential Environmental Benefits

It has been suggested that bicycle tourists are more environmentally sensitive. Simonsen and Jorgenson (1996) noted that bicycle tourists choose more environmentally friendly accommodation and were found to cause less damage through their energy consumption, water consumption, refuse and sewage, traffic, noise and visual pollution. Nevertheless, most use cars during their holidays in Denmark (Simonsen and Jorgenson, 1996) and concerns have been raised concerning the use of cars by cycle tourists in English national parks (Lumsdon, 2000). Ritchie (1999a) discovered that 50.6% of cycle tourists in his study had used, or were intending to use, transport support services during their cycling holiday. As Section 6 suggests, cycle tourists in Australia also often use motorised transport for some for some part of their holiday, questioning their degree of environmental sensitivity.

Many government agencies have turned disused and often derelict railway lines into rail trails for walkers, cyclists and horse riders. In the United States by 1996, 7,600 miles of old railway lines had been converted into rail trails often funded through state taxes, lotteries, foundations and from government transport programs (Clarke, 1996). Most of the literature notes that such trails are mainly used by locals for recreation or social purposes, although the United Kingdom is developing a national cycling network by Sustrans (an environmental charity) in partnership with stakeholders such as local government and government agencies such as Railtrack, English Heritage and VisitBritain. As researchers have noted, the infrastructure for cycle tourism (such as routes) are often already in existence and do not require large investment in resources. This type of tourism is small scale and hold great potential for revitalizing greenways helping to preserve heritage for future generations (Iles and Wiele, 1993).

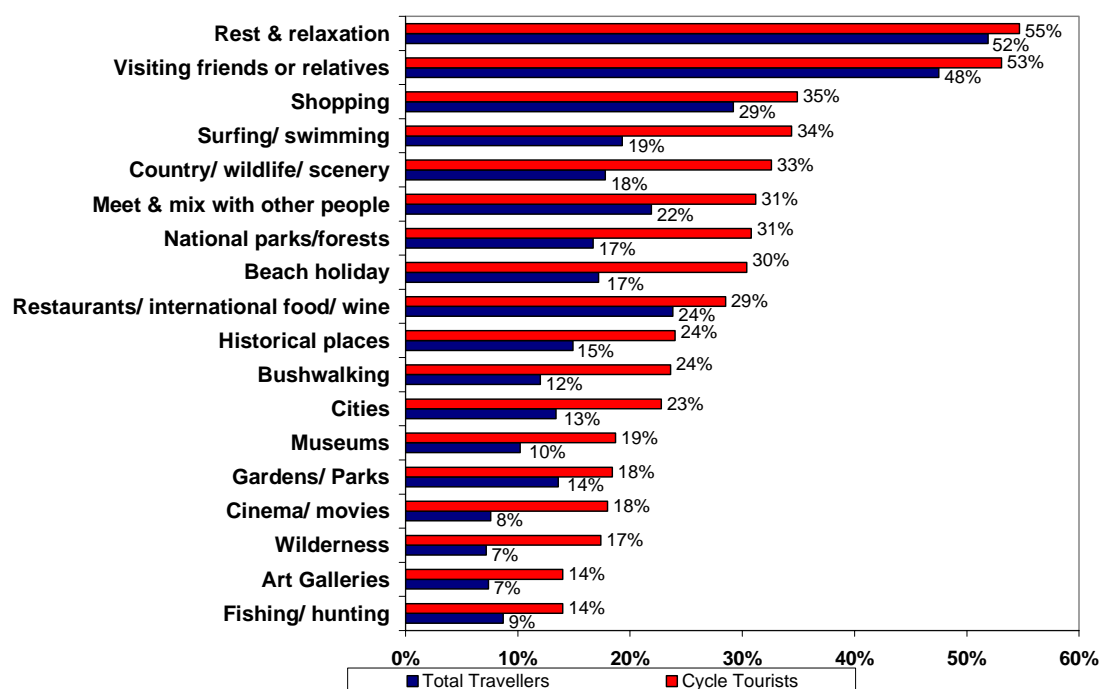
However, the realization of potential environmental benefits depend on the size and scope of market segments. Clearly an increase in the number of commercial cycle tour operators providing commercial accommodation, support services and the like may provide as much emissions as a mass tourist and certainly more from a DIY independent cycle tourists who may camp or stay with friends and relatives.

6. A National Snapshot

While Tourism Australia (2005) and the Tourism White Paper (2003) have identified cycle tourism as a growing niche market and the potential of this market for regional Australia, to date little research has been conducted on cycle tourism to quantify the size and scope of this market. For example, neither the International nor the National Visitor Surveys include specific questions related to cycling. Tourism Australia does, however, commission the Roy Morgan Holiday Tracking Survey (HTS), which obtains information on the holiday patterns and behaviours of Australians. For the purposes of this survey, cycle tourists are defined as “Australians aged 14+ who have taken a holiday in the last 12 months and who rode a bicycle as a form of transport on their last holiday” (Roy Morgan Research, 2005). It should be noted that this excludes those travelling to take part or watch cycling events away from their home town.

In the HTS for the period July 2004- June 2005, there were 134,000 cycle tourists, which is approximately 1 per cent of all domestic tourists and a 17 per cent increase on the 115,000 estimated cycle tourists (2001-2002 cited in South Australian Tourist Commission, 2002). The scale and size of domestic cycle tourism is similar to the United Kingdom and New Zealand (see Table 6). Results from this survey concur with Section 4 of this report, demonstrating that cycle tourists are a diverse group of tourists and participate in a range of activities on holiday. For example, as Figure 2 illustrates, cycle tourists are more likely than ‘all tourists’ to participate in each of the activities listed in the HTS survey. They can be considered as ‘active’ travellers who appear to be more familiar with the destinations they visit and camp or stay with friends and relatives. However, only 27.5% travelled interstate with 20% travelling overseas and the majority travelling intrastate but stayed on average on holiday for 16 days.

Figure 2. Activities on last trip by cycle tourists and all tourists



Source: Roy Morgan Research (2005).

Other details pertaining to cycle tourists and their last trip are provided in Table 7, which highlights the differences between the characteristics of cycle tourists and ‘all tourists.’

Table 7. Comparison of Characteristics of Cycle Tourist with All Tourists

Cycle Tourist Characteristic (based on last trip)	Cycle Tourists n=805	Total Tourists n=90,928
Demographics		
More likely to be male	58 %	52 %
More likely to be aged 14-24 years	32 %	18 %
More likely to be aged 25- 34 years	27 %	19 %
Less likely to be over 65 years of age	2 %	12 %
More likely to live in Western Australia	17 %	10 %
Less likely to live in Queensland	15 %	19 %
Travel Party		
More likely to travel as a family with children	28 %	25 %
More likely to travel alone	18 %	11 %
Less likely to travel with a partner/as a couple	22 %	32 %
Accommodation		
More likely to stay in home of friend or family	45 %	40%
More likely to camp/stayed in a tent	19 %	7%
Other Transport		
More likely to use aeroplane	38 %	24 %
More likely to use ferry/boat/other boat	32 %	6 %
Less likely to use own car or 4WD	51 %	55 %
Information Sources		
More likely to have visited destination previously	29 %	18 %
More likely to get information from friends/family	24 %	21 %
Destinations		
More likely to go on overseas trip	20 %	9 %
More likely to visit Western Australia	16 %	8 %
Less likely to visit New South Wales	24 %	31 %
Less likely to visit Queensland	15 %	21 %
Booking Method		
More likely to book through a travel agent	24 %	14 %
More likely to book on the Internet	12 %	9 %
Seasonality		
More likely to travel in January	11 %	9 %
More likely to travel in April	11 %	10 %
More likely to travel in December	10 %	10 %
Holiday Type		
More likely to have a holiday where “I can undertake some active outdoor pursuits”	30 %	13 %
More likely to have “a family holiday where I can relax and the kids are occupied”	23 %	15 %
More likely to have “a very active holiday where I can pursue physically challenging activities”	19 %	5 %
Less likely to have a holiday “where I can escape the grind”	26 %	31 %
Length of stay		
More likely to stay more than one month	11 %	3 %
Less likely to stay 3 nights or less	35 %	46 %
Expenditure		
More likely to spent more than \$2000	27 %	18 %

Source: Roy Morgan Research (2005).

As Table 7 demonstrates, cycle tourists are more likely than all tourists to spend more than \$2,000 on their last trip. Further details related to the expenditure of cycle tourists are provided in Table 8 which indicates that, based on information from the HTS, domestic cycle tourists spent over \$213 million in Australia during 2004-2005. Interestingly, the average spend is \$124.65 per night for each domestic cycle tourist or \$1,994 in total. This compares slightly more favourably than the average overnight domestic expenditure of \$112 per night in 1998 or \$444 per trip (BTR, 2000)

Table 8. Estimated Domestic Cycle Tourist Expenditure 2004/2005

Average spend per night	\$124.65
Average length of stay	16 nights
Total trip expenditure	\$1,994.40
Number of cycle tourists in 2004/2005	134,000
Total expenditure by cycle tourists 2004/2005	\$267,249,600.00
Number of cycle tourists holidaying in Australia (80% of all cycle tourists)	107,200
Total expenditure by cycle tourists 2005/2005 holidaying in Australia	\$213,799,680.00

Source: Roy Morgan Research (2005).

With regard to the Roy Morgan value segments, cycle tourists are most likely to come from the 'Socially Aware' (25%) or 'Look at Me' (21%) segments, and be 'Big Spenders' (44 %). They are also more likely to be Adventure Travellers (29%) or Peer Group Travellers (28%) and least likely to be Touring Travellers (7%) or Luxury Travellers (14%).

A South Australian Tourist Commission (SATC) report produced in 2002, estimated that 298,000 Australian holiday makers (or 2.7%) participated in bike riding as an activity on their last trip, compared to 2.8% who played tennis/squash and 3.3% who played golf. This report identified cycle tourists as more likely to be male, from younger age groups, not employed in full time employment and more likely to travel for 3 nights or more at an intrastate destination. They also concluded, similar to the Roy Morgan research, that cycle tourists tended to stay in camping or caravan style of accommodation.

However, as noted above, the Roy Morgan HTS and the SATC produced no detailed information on the different cycle tourism segments, or cycle tourists participating in specific cycling activities. The obvious difference between the figures provided by Roy Morgan and the SATC could be because of definitions used to collect such data and the methodology employed. Although data exist on domestic cycle tourism there are no data on international cycle tourists at a national level. The following sections will examine the specified cycle tourism segments of touring, community events, competition and mountain biking more closely from data gathered on regions and local areas to help demonstrate the size and scope of cycle tourism in Australia at a regional and local level, because of a lack of detailed national level data.

7. Regional and Local Data in Australia

7.1 Touring

Much of the research related to cycle tourism relates to cycle touring. As discussed earlier, international research suggests that the largest cycle tourism market is that of touring, particularly DIY independent cycle touring. However, the nature of such tourists' holidays differ depending on the country under study. For example, while Ritchie (1999a) suggests longer circuit touring as an important segment in New Zealand, in Europe cycle tourism is often undertaken by families as a short-break holiday (Becken, 2002; Simonsen and Jorgenson 1996). Differences appear to be based on the potential needs of different cycle touring markets, as well as the provision of infrastructure (routes, information etc.) and the terrain and level of difficulty. This section of the report looks more closely at both independent and commercial touring in Australia.

7.1.1 Commercial Cycle Tours

A number of companies across Australia offer guided and self-guided bike tours. These tours can range from all-inclusive luxury tours to camping tours where cyclists are expected to be much more self-sufficient. An internet search has so far located approximately 20 tour operators offering bike tours in all states and territories of Australia, ranging from half and full day tours in and around Sydney, to a 30 day (2130 kilometre) tour from Port Augusta, South Australia, to Karumba, Queensland. A list of tours available to cycle tourists in Australia is provided in Appendix A. However, enquiries on international visitor numbers undertaken by tour operators suggest that from the 9 who responded 5 had no international cycle tourists and the other 4 had 127 between them or 32 each over 2005. From the data gathered tour operators may offer their services as an 'add-on' or extra to other tours that they provide. These figures are very low and indicate that the majority of international cycle tourism to Australia is most likely organised and undertaken independently as suggested by Beioley (1995) in the United Kingdom and Ritchie (1999a) in New Zealand.

Apart from cycle tours that allow participants to travel from one destination to another by bicycle, and usually at a moderately sedate pace, there are also cycle tours offered that include a greater level of adventure through offering 'centred cycle tourism experiences.' For example, Barking Gecko MTB Tours provide cycle tours through the Flinders Ranges, and uses local accommodation during its tours. Although there are also several mountain bike companies that promote mountain bike tours, these have been included in the mountain biking section of this report as tours are less than one day in duration.

7.2 Independent Travellers

Just as with other types of tourism, cyclists can also participate in cycle tourism as free independent travellers, utilising the infrastructure of cycle networks and rail trails, as well as regular roads and off-road paths. The size of this market can not easily be quantified, although an indication of the interest in the trips independent travellers undertake can be seen in magazines such as the *Australian Cyclist*, which publishes touring articles from its readers (the *Australian Cyclist* is a national

magazine for non-competitive cyclists and has 10,000 subscribers and newsagency sales estimated at 2,500). Data are required on the number of international independent cycle tourists and this may be best captured at a regional or local level (such as rail trails and well known cycling routes).

7.2.1 Rail Trails

Rail trails are “*shared-use paths recycled from abandoned railway corridors*” (Railtrails Australia, 2005) and are generally used for cycling, walking and horse riding. Although not all rail trails are suitable for cycling, they are generally attractive to cyclists in Australia because they mostly comprise gentle hills and often are located in green corridors.

Rail trails are located in both metropolitan and regional Australia, and link large and small country towns just as trains did in the past. There are currently over 80 rail trails listed on Railtrails Australia’s website, with these trails ranging from less than one kilometre in length (Webb Dock Bridge, Melbourne, .5km; Muntapa Tunnel, Queensland, .6km) to over 1000 kilometres (Old Ghan Heritage Route, Port Augusta to Alice Springs, 1050kms). It is important to note that the number of rail trails does not remain constant as more and more trails open and existing trails are linked together to form longer trails. A list of existing and proposed rail trails in Australia is included in Appendix B.

While Victoria has the most developed rail trails in Australia, with old timber tramways that were formerly used for logging being converted to trails (RailTrails Australia, 2005), in Western Australia the Munda Biddi Trail (managed by the Munda Biddi Trail Foundation) is the longest of the state’s walking and cycling trails. When the trail is completed it will be 900 kilometres long, with about one third of the distance being on old railway formations. Currently, a 332 kilometre stretch of the trail, from Mundaring to Collie, is open.

Trails in South Australia are managed by South Australian Trails, with the most popular of the South Australian rail trails, and one of the first developed in South Australia, being the 27 kilometre Clare Valley Riesling Trail (South Australian Trails, 2005b). Rail trails are also well developed in Tasmania, particularly on the west coast as railways were required in this area to serve the mines (RailTrails Australia, 2005). Rail trails also exist in the Northern Territory, Queensland, New South Wales and the ACT, although they are not as well developed in these states. For example, the Northern Territory has only two rail trails, with both being part of the former Northern Australian Railway, while rail trails in NSW are mainly found in the Blue Mountains and Newcastle area (RailTrails Australia, 2005).

State maps illustrating the location of rail trails are provided in Appendix C.

It has been argued that rail trails have the potential to promote economic development in regional Australia, as cyclists go from town to town at a leisurely pace, often utilising local services, including accommodation, food and beverage outlets, and tourism attractions, such as wineries (Railtrails Australia, 2005). As discussed earlier, Beeton (2003), in her study of rail trails in Victoria, found that for every visitor day on Rail Trails, \$51.10 of expenditure is injected into the economy. Beeton (2003) argues that this compares positively with similar overseas studies.

7.2.2 Cycle Networks and Trails

Apart from rail trails, there are a number of other cycle networks and trails in existence (or being developed) that provide opportunities for cycle tourists. Cycle tourists have a number of needs, one of which is good cycle routes and quiet roads or designated shared paths. Cycle networks and trails can meet this need by linking existing paths, towns and attractions. The NSW Coastline Cycleway Program and Tasmanian Trail are discussed more fully below as examples of how this type of infrastructure is used by cycle tourists.

New South Wales Coastline Cycleway Program

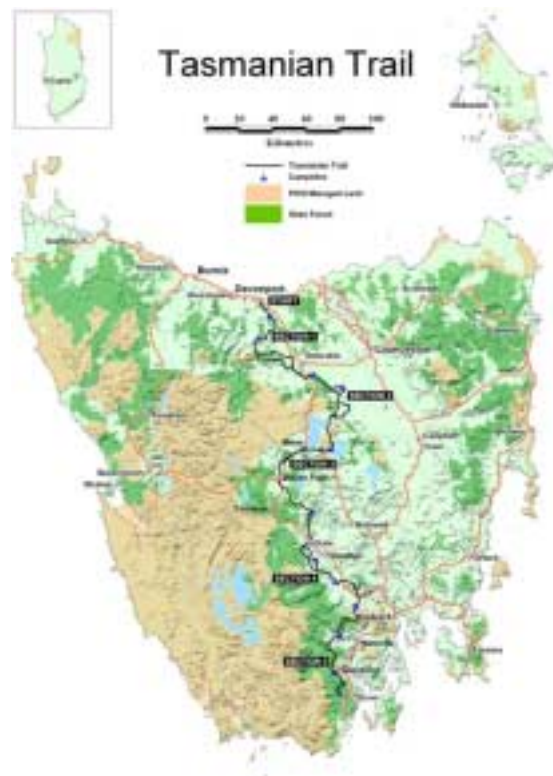
The aim of the NSW Coastline Cycleway Program is to have a “*high quality, regional cycleway running 1400km along the NSW coast from the Victorian border to the Queensland border*” (Office of Coastal, Rural and Regional NSW, 2005). The program, which is a matching dollar-for-dollar grant program, began in 2003, when the NSW government provided \$6 million in seed funding. The route involves 23 NSW regional coastal councils and aims to follow the coastline and avoid main roads wherever possible. Shoalhaven City Council is promoting its cycleways for both local use as well as tourism to connect local routes with the NSW Coastline Cycleway Program.

The Tasmanian Trail

The Tasmanian Trail is 480 kilometres in length and extends from Devonport to Dover, as illustrated in Figure 3. The trail is over 10 years old and links up existing forestry roads and fire trails as well as country roads and passes through a number of small towns. The Tasmanian Trail is promoted and managed by the Tasmanian Trail Association and supported by private landowners and the Hydro Electric Commission, who allow access and/or camping (Parks and Wildlife Service, 2005). The Tasmanian Trail Association received a grant of \$120,000 in late 2004/early 2005 from the State Government to secure and maintain the trail.

The Tasmanian Trail Association considers the greatest demand for the trail as being “*from predominantly urban people seeking a soft adventure experience. They are less experienced in the bush and need more support*” (Tasmanian Trail Association, 2005: 2). To meet the perceived needs of this market, the Tasmanian Trail Association plans to improve facilities provided at campsites; develop accommodation and service guides; improve trail markings; and produced a new guidebook for cycle tourists.

Figure 3. The Tasmanian Trail



Source: Parks and Wildlife Service, Tasmanian Department of Tourism, Parks, Heritage and the Arts

However, data from local agencies on the potential economic impact related to cycle tourism from such trails and cycleways was proven difficult to gather in the compilation of this report. Section 9 makes recommendations for the development of models to examine the cost/benefits of cycle routes for tourism and local use.

7.3 Community Cycling Events

While touring is clearly a popular activity with cycle tourists, it is in the area of cycling events that receives much of the media attention, and in which there has been the greatest amount of research undertaken in Australia (which is a very different situation to international countries who focus on cycle touring). The emphasis on these events is participation, friendship and meeting the personal challenge of completing the event. The following sections address multi-day and single-day community events and provide details of some of these events. A list of cycling events is provided in Appendix D.

7.3.1 Multi-Day Rides

Multi-day rides offer opportunity for regional and rural communities to benefit from cyclists staying in local accommodation and purchasing food and beverages and retail items before and after, as well as during these events. The following section includes a snapshot of some of the multi-day events available to cyclists, and, where available, includes details on the number of participants, estimated expenditure and length of stay of the cycle tourists. As is evident by the number of new events that continue to

enter the marketplace, as well as from the growth in the size of existing events, it is clear that multi-day events are a growth area of cycle tourism.

Table 9 provides some estimates using secondary data provided at a national level on cycle tourism and regional tourism expenditure surveys applied to some of the larger bike rides. Although cycling organisations provide some data on the impact of events, often details on the method and sampling are lacking and sample sizes are small. For instance, the Be Active Tour spend estimates were generated from a sample of 128 visitor respondents. The authors realise that event organisers have limited resources and suggest in Section 9 a need for consistent methods for evaluating the economic impact of cycling events so that events can be compared across regions.

Table 9 used two sources of data: the Roy Morgan HTS data on cycle tourist expenditure, and BTR (2000) data on regional tourist expenditure to estimate the direct economic impact associated with cycling events. It illustrates a lower amount of economic impact from individual surveys undertaken by cycling event organisers, but does not include data on ride entry fees and expenditure by event organisers and volunteers.

Table 9. Economic Impact Estimates of Major Cycle Tourism Events

Event	Participant numbers¹	Event Duration	Total Spend Estimate Based on Roy Morgan Data²	Total Spend Estimate Based on BTR (2000)³
Cycle Queensland	1,000	9 days	\$1,218,850	\$1,116,000
Great Victorian Bike Ride	4,000	9 days	\$4,487,400	\$3,960,000
Great Tasmanian Bike Ride	1,100	9 days	\$1,234,035	\$1,267,200
Great NSW Bike Ride	1,100	9 days	\$1,234,035	\$990,000

¹ Based on most recent figures.

² Based on secondary data provided in section 6 of the report suggest an average spend of \$124.65 per night from domestic overnight cycle tourists in Australia. The average total overnight spend of cycle tourists based on Roy Morgan data is \$1994.

³ Based on secondary data provided by BTR (2000) assessment of regional tourist expenditure. The average spend of each region is used based on average State/Territory or local tourism regional expenditure by visitors.

Note: This data includes intrastate as well as interstate expenditure and is an indicative estimate only and excludes ride entry fees and expenditure by event organisers and volunteers. Not all participants will take part in the rides on all days.

The data in the table above, suggest that the big bike rides create economic impacts at a regional and local level. However, the estimates in Table 9 do differ somewhat to the data provided by event organisers, which are noted in the following section of the report. However, conservatively they estimate between approximately \$1.2 million and \$4.5 million per Big Bike Ride in Australia.

Great Victorian Bike Ride

The Great Victorian Bike Ride is an annual event organised by Bicycle Victoria. The event has been running for 20 years and each year the ride visits different areas of regional Victoria. The 2005 event involved riding 570 kilometres, from the Murray River (Swan Hill) (see Figure 4) to the Yarra River (Heidelberg, Melbourne), over a nine day period. In 2004 there were approximately 8,000 riders and was from Port Fairy to Geelong. The 2005 Great Victorian Bike Ride attracted over 4,000 riders and involved more than 400 volunteers.

Figure 4. 2005 Great Victorian Bike Ride

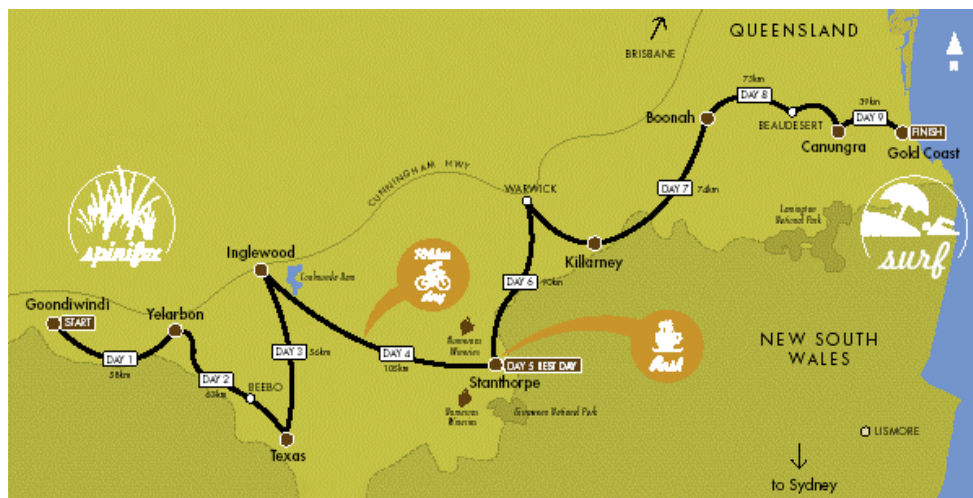


Source: Bicycle Victoria.

Cycle Queensland

Cycle Queensland is the annual nine day ride through regional Queensland that is organised by Bicycle Queensland. This ride attracts approximately 1,000 riders each year, with each ride going through different regions of Queensland so that the tourism expenditure is dispersed throughout the State. The 2005 Cycle Queensland covered the 560 kilometres from Goondiwindi to the Gold Coast (see Figure 5), while the 2006 Cycle Queensland will commence in Port Douglas and finish in Mission Beach.

Figure 5. 2005 Cycle Queensland Route



Source: Bicycle Queensland.

The Great Tasmanian Bike Ride

The Great Tasmania was held in February 2005 and was organised by Bicycle Victoria as its annual 'out of state' event. The event attracted over 1,100 riders who rode 576 kilometres through Tasmania's west coast wilderness over a nine day period. Part of the ride utilised the Tasmanian Trail, as depicted in Figure 6.

Figure 6. Participants in the Great Tasmanian Bike Ride



Source: Tasmanian Trail Association.

NSW Big Ride

The NSW Big Ride is an annual event organised by Bicycle NSW and takes a maximum of 1,500 riders (plus volunteers) through New South Wales regional towns over a nine day period. Although Bicycle NSW has not undertaken economic impact or evaluation studies on this event each of the towns visited (see Figure 7) receives the benefit of any expenditure made by participants and volunteers during their visit.

Figure 7. 2006 NSW Big Ride Route



Source: Bicycle NSW

An evaluation by event organizers reports an average spend of \$137 per day per person involved in the event, and a total average spend of approximately \$1,233 per person (in EcoGIS, 2002).

Be Active Tour

The Be Active Tour is one of the events associated with the Jacob's Creek Tour Down Under (see Section 7.5.1) and was developed in 2003 in collaboration with Bicycle SA. This event allows non-elite cyclists to ride either 73 or 150 kilometres on the Stage 3 race route.

The Be Active Tour 2005 attracted just under 2,000 participants (1,387 in 2004; 613 in 2003), with almost 20 per cent of these participants coming from outside South Australia (22% in 2004). The expenditure of visitors to South Australia attributable to the Be Active Tour 2005 has been estimated at \$350,000, although a small percentage of this expenditure associated with pre-event costs may have been spent outside South Australia. The average expenditure per visitor reported was \$2,702.44, with accommodation (18.3%) and meals, food and drink (17.8%), being the largest expenditure sectors (Australian Centre for Excellence in Cycle Tourism, 2005; Australian Major Events, 2004b).

Errinundra to the Snowy

The Wilderness Bike Ride Association is a grassroots community group based in Orbost, East Gippsland in Victoria and has successfully run two Errinundra to Snowy bike rides. The Errinundra to Snowy bike ride is an example of a much smaller community ride (compared to the 'Great' state rides), covering 230 kilometres from Wulgulmerang to Orbost over four days.

With a maximum number of riders being set at 250, there is still room for this event to grow, with 132 riders participating in 2004 and 187 riders in 2005. As the traditional timber industry of this region is now in decline the Wilderness Bike Ride Association *"committed to developing recreational bikes that build ecotourism in Far East Gippsland, as a means of creating a community building enterprise that offers people of all ages opportunities to participate, build skills and develop links between communities"* (Wilderness Bike Ride Association, 2004a).

Event organisers have estimated that the event contributes approximately \$75,000 to the local East Gippsland economy through payment to contractors, community groups and through wages, with some economic leakage present (estimated at \$10,000) as not all services can be provided within the local region (Wilderness Bike Ride Association, 2005). Apart from participant registration fees, riders spent money on accommodation, meals and fuel in Orbost before or after the ride.

7.3.2 One-Day Rides

Like the community multi-day rides, the one day rides serve to raise the profile of cycling, with the focus being primarily on community participation and participants meeting the personal challenge of completing the event. The following two examples of community one day rides serve to demonstrate the growth in this sector of cycling. Again, research on these events is much more comprehensive than that available for independent or guided cycle touring although research is often based on survey research which is not consistent. More examples of one day community rides can

found in Appendix D. However, it should be noted that their ability to attract tourists from interstate, or those that stay overnight, is probably low.

Around the Bay in a Day

Around the Bay in a Day is an annual event run by Bicycle Victoria, with the first Around the Bay in a Day taking place in 1993. The ride has traditionally involved cyclist circumnavigating Port Philip Bay, covering approximately 210 kilometres. In 2005 two associated events were introduced - a 100 kilometre Challenge requiring cyclists to ride from Sorrento to Docklands and a 50 kilometre ride to the western suburbs and back. In 2005 the event attracted approximately 10,000 competitors, an increase on the 8,800 participants in 2004 (Smith Family, 2005).

Around the Bay in a Day participants can also opt to raise money for the Smith Family, which has been the event's charity partner for 13 years (Bicycle Victoria, 2005). In 2004 approximately \$260,000 was raised for the Smith Family and approximately \$300,000 in 2005.

City of Perth Great Bike Ride

The City of Perth Great Bike Ride was first staged in 2004, with 1,350 riders completing the 53 kilometre ride, and an addition 100 riders in the 6 kilometer ride. Changes to the 2005 included the addition of a two lap challenge for faster riders, and increasing the shorter ride to 10 kilometres. Approximately 150 competitors participated in the longer challenge (106 kilometres) and over 1600 participants in the 53 kilometre ride (City of Perth Great Bike Ride, 2005).

7.3.3 Cycling Festivals

With indications that there is continued growth the cycling as a leisure activity and sport, as well as in the purchase of bikes (see Section 3), there also appears to be a growth of festival style events, where either a number of different cycling activities take place and/or cycling events are combined with other community events or tourism activities. For example, the Jacob's Creek Down Under combines the international road racing event with a range of associated community and cycling events, while the Dungog PedalFest hosts a three days of family-focused cycling activities. The following provides examples of some traditional and more recent cycling festivals.

Evandale Village Fair and National Penny Farthing Championships

The Tasmanian town of Evandale, with a population of approximately 1,000 people, is host to the annual Evandale Village Fair and National Penny Farthing Championships. Cycling events over the weekend festival include the Century Ride (100 miles/162 kilometres) and the Clarendon Road Race (30 kilometres). While the organisers offer to organise billeted accommodation, participants also utilise hotel and cottage accommodation in Evandale and nearby towns.

The event attracts approximately 40 to 50 cyclists each year, but approximately 8,000 spectators. Aspects of the event are depicted in Figures 8 and 9.

Figure 8. Evandale Village Fair



Source: Evandale Village Fair.

Figure 9. Penny Farthing Championships, Evandale



Source: Evandale Village Fair.

Harvest Cycle

The first Harvest Cycle was held in April 2005 and is a three day cycling festival that includes five races, as well as wine and food featuring highly during the event. The aim of the event, in fact, is to “*bring riders, their supporters and spectators to the Coal Valley, one of Tasmania’s premier wine and fine food regions*” (Harvest Cycle 2005). Event organisers expect approximately 150 competitors in the 2006 event.

Brindabella Challenge

The first Brindabella Challenge was held in December 2005 and brought together over 1,500 cyclists who participated in community rides, BMX races and displays, mountain biking, and road races over the three-day cycling festival. An event evaluation by the Centre for Tourism Research (2005) on behalf of Australian Capital Tourism estimated a direct economic impact of approximately \$100,000 for the ACT economy from participants alone, based on a nightly spend of \$88 per person.

7.4 Mountain Biking

While mountain biking is an activity cyclists can participate independently, commercial operators also offer mountain biking of half day to multi-day duration, with many of these tours also falling into the category of adventure tourism. For this reason, these tours are presented separately from the tours and events covered in previous sections of this report.

7.4.1 Multi-Day Mountain Bike Events

The following examples of multi-day mountain biking events illustrate the growth in the popularity of mountain biking and, even though some of these events are also races they share with the big state rides and smaller community run rides the emphasis on participation and meeting the challenge of completing the event.

Wildside MTB

Wildside MTB is a challenging mountain bike race held each year in Tasmania, beginning near Cradle Mountain and concluding at Strahan. The four days of cycling covers approximately 200 kilometres, made up of 140 kilometres of competition and 60 kilometres of cruising.

According to results listed on the event website, the event was first held in 2002, with just over 106 cyclists registered. The size of the event more than doubled in 2003, with 265 registered cyclists, followed by a further increase in 2004 to 297 cyclists. There was a slight decrease in 2005, with registrations falling back to 266 cyclists. However, an estimated 400 people were involved in the 2005 event when support rider, support crew and Wildside crew numbers were combined (Wildside, 2005).

The majority of riders in the Wildside MTB 2005 were male, with women making up only 9 per cent of all riders. Males 23-34 years made up 41 per cent of riders, with males 35-44 years being the next largest group (31%).

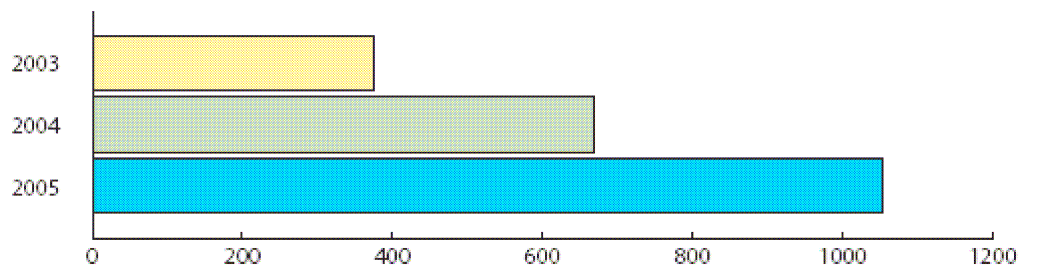
Wildside MTB adds to the economy of the west coast of Tasmania as cyclists, and their support crew, require accommodation in Cradle Mountain, Tullah, Rosebery, Zeehan and Strahan during, or after the race. Apart from Tasmanian competitors, Wildside MTB attracted 151 riders from interstate or overseas, with an estimated additional 68 accompanying non-riders. As well as accommodation during the event, visitors chose to extend their stay either before or after the event, with the average length of stay in Tasmania for the 4 day event being 6 nights. Many visitors also indicated that the Wildside MTB was part of a longer holiday, with 48 visitors indicating they stayed in Tasmania for 10 nights or more (Wildside, 2005).

The Wildside MTB 2005 event evaluation estimated the direct economic benefit to Cradle Coast region to be \$280,000, and the direct economic benefit to Tasmania to be \$236,520.

Cycle Epic

Cycle Epic is an annual mountain bike event held in Queensland's Lockyer Valley. The event is marketed as "Australia's premier single day endurance event" and offers a 50 kilometre and 100 kilometre ride for both recreational riders and professional racers. The event has been running since 2003 and attracts approximately one-fifth of the field from outside Queensland. Participation numbers have increased each year, as illustrated in Figure 10, but will be capped at 1,500 in 2006.

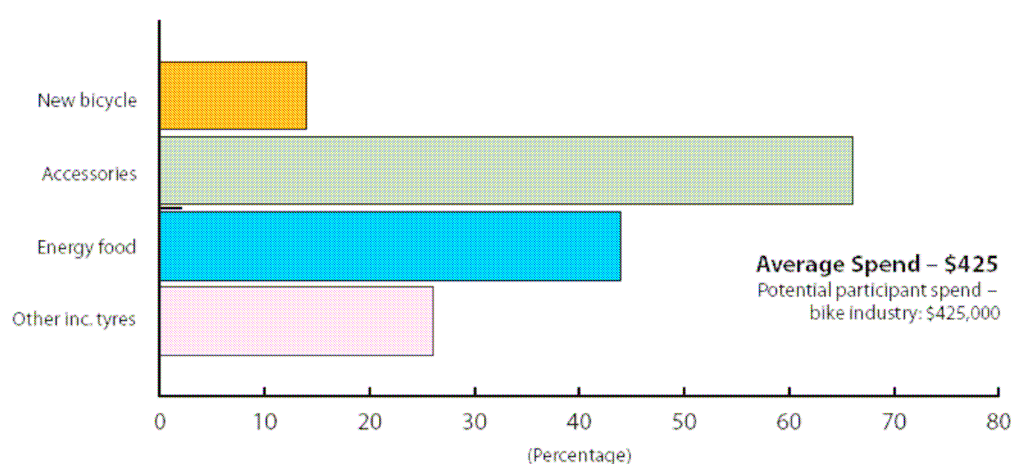
Figure 10. Cycle Epic Participation Numbers 2003-2005



Source: Cycle Epic (2005).

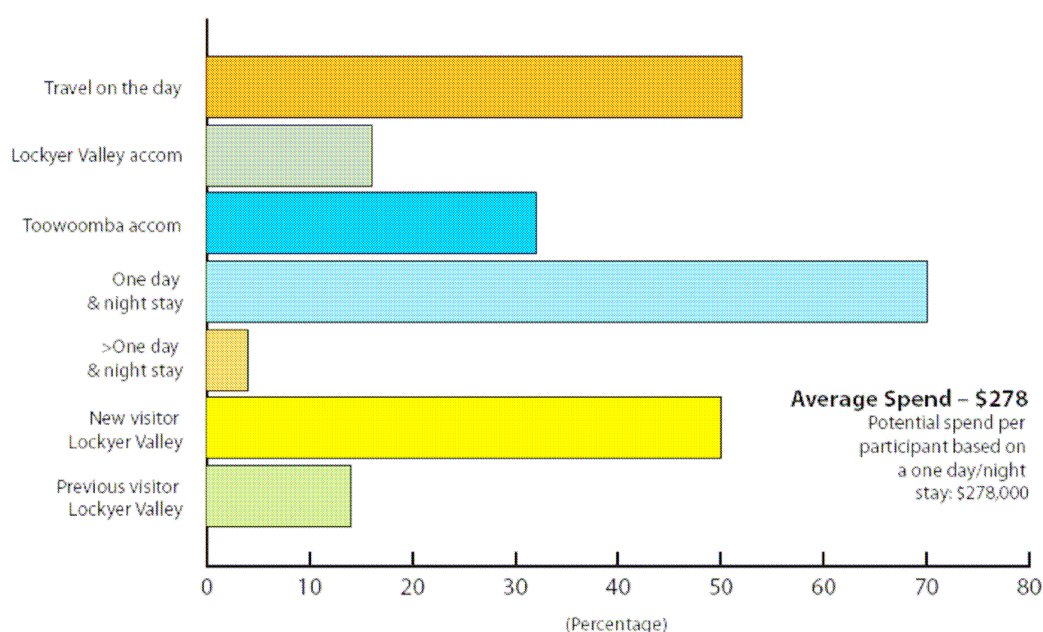
Figures 11 and 12 illustrate the expenditure by participants in relation to event specific spending as well as travel and accommodation expenses.

Figure 11. 2005 Cycle Epic Event Specific Spending



Source: Cycle Epic (2005).

Figure 12. Cycle Epic Travel and Accommodation



Source: Cycle Epic (2005).

7.4.2 Independent Mountain Biking

There are many opportunities for independent mountain biking, with trails, such as the Mawson Trail, offering the infrastructure to attract this sector of the cycle tourism market.

Mawson Trail, South Australia

The Mawson Trail almost 900 kilometre long and has been described by Bicycle SA as Australia's premier off road cycling trail (Bicycle SA, 2005). The Mawson Trail uses country roads, state forest and national park fire trails, farm access tracks and

unmade or unused road reserves and, unlike rail trails, is quite steep in some sections and allows mountain bikers to travel through South Australia's regional and remote areas. The Mawson Trail is managed by South Australian Trails (South Australian Trails, 2005a).

7.5 Competition

7.5.1 Competition - Road and Track Cycling

Australia is now considered to be one of the world's top competitive cycling nations (Australian Bicycle Industry, 2005), and as such stages a number of national and international events. These include the Australian Open Road Championships and the Australian Masters Road and Track Championships.

From a cycle tourism perspective cycle tourists may be the competitors, or, as is the case with the Jacob's Tour Down Under (below), they may be spectators.

Jacob's Creek Tour Down Under

The Jacob's Creek Tour Down Under is an annual road cycling event that has been running since 1999 and involves Australian and international cycling teams completing 728 kilometers over six stages. The Jacob's Creek Tour Down Under is an internationally accredited race, endorsed by the world cycling federation, the Union Cycliste Internationale (UCI) and is owned and managed by Australian Major Events, the major events division of the South Australian Tourist Commission (Australian Major Events, 2004b).

Attendance at each of the six stages of the event is free, making the calculation of attendance figures difficult to assess. However, crowd estimates by South Australian Police, combined with survey results in 2003 and 2005 make estimates possible. These estimates demonstrate the event continues to grow in both total attendance and visitor numbers. These figures are provided in Table 10. Based on these attendance numbers, it is estimated that holding the Jacob's Creek Tour Down Under provided an economic benefit of \$13.2 million to South Australia in 2005 (approximately \$12.5 million in 2003 and 2004). At a regional level, it is estimated that the 10,920 event-specific visitors in 2003 stayed an average of 1.4 nights in regional South Australia and spent an average of \$135 per night, amounting to around \$2.36 million in total (Australian Major Events, 2004a, 2004b, 2005).

Table 10. Attendance at Jacob's Creek Tour Down Under 2003-2005

	2003	2004	2005
International and interstate visitors who came specifically for the event	10,920	11,000	11,670
Total attendance	450,000	470,000	495,000

Importantly, from a cycle tourism perspective, other cycling events and community activities associated with the Jacob's Creek Tour Down Under include:

- Australian Open Road Championships
- Women's and Men's Criterium Series
- *Be Active Tour*
- South Australia's Classic Veterans' Race Series

- Jacobs Creek Ride to Cure Diabetes
- Super-Drome Challenge
- Legends Night Dinner.

Apart from the economic impact of the Jacob's Creek Tour Down Under, the media coverage adds to the exposure that regional South Australia receives both domestically and internationally. Australian Major Events estimated television coverage in key target areas during the 2004 to be greater than 50 hours (Australian Major Events, 2004b).

7.5.2 Competition - Mountain Biking

Apart from road and track championships, annual mountain bike championships are also run at different venues throughout Australia. For example, the 2006 Mountain Bike Australia's National Downhill and Mountain Cross Country Championships held in Thredbo between January 19 2006 and January 22 2006. This event was expected to attract over 500 competitors (Raw NRG, 2005). A similar event, the AMBA Cup, was held in Thredbo in 1999, with details of this event outlined below.

AMBA Cup

In 1999 an evaluation of the AMBA Cup Mountain Bike Race (Snowy Mountains stage of the Mountain Bike National Championship) was undertaken. This evaluation indicated that participants in the AMBA Cup brought with them on average 1.14 accompanying people; stayed on average 2.9 nights; and spent \$508.87 (including accompanying persons) in the Snowy Mountain Region. Visitor expenditure due to this event being held in the Snowy Mountain Region was calculated to be \$222,258, with an impact on Gross Regional Product of \$88,459 (Janeczko, Mules and Ritchie, 2000).

8. Conclusion and Recommendations

This report has attempted to provide an analysis of the size and scope of cycle tourism in Australia. It has noted the growth and importance of cycle tourism to other countries including the United Kingdom, Denmark and New Zealand and the documented economic, environmental and social benefits from cycle tourism overseas. However, because of limited research and coordination in Australia, the size and scope of cycle tourism is difficult to ascertain. This is partly because of the potential range of market segments and definitions used to collect data on cycle tourism. Other countries, such as the United Kingdom, use consistent definitions to measure the size and scope of cycle tourism. However, in Australia there appears to be some discrepancies concerning the nature of cycle tourism and different operational definitions used to collect survey data. The following recommendations are focused on data collection required to provide an adequate estimate of the size and scope of cycle tourism in Australia.

Recommendation 1: That Cycle Tourism Australia develop and promote a definition of cycle tourism and identify cycle tourism market segments which will help determine the size and scope of cycle tourism in a consistent and accurate way at a national, regional and local level.

Although the Roy Morgan HTS does provide a snapshot of domestic cycle tourism, the definition used in data collection excludes those traveling to participate in or watch cycling events. Furthermore, there are no data collected at a national level concerning international cycle tourism. However, data collected at a national level through the National and International Visitor Surveys would not provide a sufficient sample size. Clearly, the number of commercial tour operators catering to international cycle tourists is small, providing ease of data collection and monitoring prior to any possible growth in numbers.

Recommendation 2: That consideration is given to ways of gathering data on the size and scope of international cycle tourists. This could involve tour operators providing data through online data tools such as IPAT to track international commercial cycle tourists and regional or local level research data to track DIY cycle tourists (discussed in recommendations 3-5).

Although there are some data at a national level, the Roy Morgan HTS data on cycle tourists appears to mask the different market segments of cycle tourists. It appears that this might be best carried out at a regional or local level at key cycle tourism destinations such as trails or routes. It may be possible to further investigate the Roy Morgan data or recontact respondents to more accurately assess the size of various market segments, at possibly a lower cost than a new national survey.

To date limited research has been carried out on DIY cycle tourists (the largest potential segment of cycle tourism) with research in Australia including trail walkers and horse riders as well as cyclists (Beeton, 2003). In the United Kingdom route monitoring is undertaken using trail counters on usage levels linked with observations of trail user types followed by surveys of trail users (including cycle tourists) weighted by counter and observational data. Such data provide useful information on

cycle tourist size, profiles and economic contribution to the local and regional area. Similar research at trails or routes in Victorian, South Australian or Western Australian could help identify the size and scope of trail cycle tourists which could be applied to other similar trails. Such information would be of value to government in undertaking cost/benefit analysis of potential trail or route development, but it must be developed and applied consistently. Finally, research is required into cycle tourism events as current data are not consistent and could lack rigor. In Section 7.3.1 of this report a consistent approach was applied to compare events.

Recommendation 3: That tourism and cycling organisations examine the possibility of jointly funding research from market research companies to gather data at a national level on the size of domestic cycle tourism (based on an established definition as noted in recommendation 1) examined by market segment (i.e. DIY longer touring, centered day trips, cycle event participation).

Recommendation 4: That tourism and cycling organisations (in conjunction with regional and local partners such as State and local government) develop a research program to supplement national research at a regional and local level choosing a range of trails or routes to study. That this research be undertaken to help identify the size and scope of the current market at a regional or local level and collect information on spending patterns to estimate the economic impact by cycle tourism segments (international, domestic, DIY touring, centred day trips).

Recommendation 5: That tourism and cycling organisations examine the possibility of jointly funding research concerning cycling tourism events. It appears that current data are not consistent and could lack rigor. It is suggested that event organizers consider using consistent event templates to measure the size, market type and economic impact of cycling tourism events (such as the STCRC Encore product) and identify who or what is included in such assessments (such as volunteers, entry fees etc).

The overseas experience suggests that the development of product that can be used by cycle tourists (information, transport and support services) often in proximity to cycling routes, does increase the demand for cycle tourism. However, no research or models have been developed in Australia concerning the potential latent demand and identifying constraints that could be overcome (through product development or marketing) thereby turning latent demand into effective or real demand.

Recommendation 6: That research is undertaken to develop a latent demand model to examine constraints to cycle tourism and the effect of investment in infrastructure and/or routes on cycle tourism numbers. Such information could be used in cost/benefit analysis prior to construction of routes.

The report also has started to collect some data on cycle touring trails, events and commercial operators. A more detailed audit (including aspects outlined in Table 4) could be undertaken to help provide information concerning possible supply or infrastructure gaps at a national, regional and local level, which if dealt with, could tap into the latent demand for cycle tourism. Certainly longer touring routes (such as the C2C in the United Kingdom) appear to be attractive to international cycle tourists. Conducting a resource audit and identifying where local or regional routes can be joined to provide longer distance routes is required.

Recommendation 7: That regional or local tourism and government authorities identify potential cycle tourism routes and consider undertaking resource audits, prior to developing and marketing such routes to cycle tourists.

Certainly, cycle tourism has many potential benefits for regional and local communities, however the development and marketing of cycle tourism in Australia has been hindered by a lack of information and data at a national, regional and local level. Cycling Tourism Australia has the potential to take a lead role in facilitating research, product development and marketing in a consistent and rigorous way. It is hoped that this report has made some small contribution to the future development of cycle tourism.

9. Bibliography

- Australian Bicycle Industry, (2004). *Australian Bicycle Industry Report 2004*, Victoria.
- Australian Bureau of Statistics, (2002), Cat No. 4177.0.
- Australian Centre for Excellence in Cycle Tourism (2005). *Interim Draft Survey Results: Be Active Tour 2005*,
<http://www.bikesa.asn.au/cycletourism/pdf/BAT%20Draft%20Survey%20findings.pdf>
- Australian Centre for Excellence in Cycle Tourism (2005).
<http://www.bikesa.asn.au/cycletourism/index.html> (accessed 5/1/06)
- Australian Major Events (2005). *Economic Impact and Post-Event Survey Results from 2005 Jacob's creek Tour Down Under*, (unpublished report)
- Australian Major Events (2004a). *Fast Facts: 2005 Jacob's Creek Tour Down Under*, (unpublished report).
- Australian Major Events (2004b). *Yellow Pages South Australian Tourism Awards 2004: Category 3 Major Festivals and Events – Jacob's Creek Tour Down Under*, (unpublished report).
- Australian Sports Commission,(2005a). *Participation in Exercise, Recreation and Sport Survey 2004 Annual Report*, Standing Committee on Recreation and Sport.
- Australian Sports Commission (2005b). *Membership Growth – cycling*,
<http://www.ausport.gov.au/membershipgrowth/cycling.asp> (accessed 9/1/06)
- Becken, S. (2002). *Tourism and Transport in New Zealand: Implications for Energy Use*, Lincoln University: Christchurch.
- Beeton, S. (2003). *An Economic Analysis of Rail Trails in Victoria, Australia*, La Trobe University, Bendigo.
- Beioley, S. (1995). On yer bike - Cycling and tourism. *Insights*, September, B17-B31.
- Bicycle Federation of Australia (2005). *Bicycle Federation of Australia – Homepage*,
<http://www.bfa.asn.au/> (accessed 4/11/05).
- Bicycle New South Wales (2005a) *Australian Cyclist*, December 05-January 06,
<http://www.australiacyclist.com.au/> (accessed 5/1/06).
- Bicycle New South Wales (2005b). *Bicycle New South Wales Annual Report 2005*,
<http://www.bicyclensw.org.au/pdf/2005%20Annual%20Report.pdf>, (accessed 5/1/06)
- Bicycle Queensland (2005). *Cycle Queensland 2005*,
<http://www.cyclequeensland.com>, (accessed 18/11/06).

- Bicycle South Australia (2005). *Mawson Trail*, http://www.bikesa.asn.au/mtb_projects/mawson.htm, (accessed 9/1/06)
- Bicycle Victoria (2005). *The Good Oil*, Issue One, November 2005.
- Blackwell, D. (2002). *The Community and Visitor Benefits of the Otago Central Rail Trail*. Lincoln university: Canterbury, New Zealand.
- Carrè, J. R. (1992). 'La Situation de la bicyclette en France.' Paper presented at *The Bicycle: Global Perspectives*. September 13th-17th, Montreal. Canada.
- Centre for Tourism Research (2006). *Brindabella Challenge 2005: Event Evaluation*. (unpublished report) Centre for Tourism Research: Canberra.
- City of Perth Great Bike Ride (2005). *City of Perth Great Bike Ride*, <http://www.greatbikeride.com.au/index.htm> (accessed 5/1/06)
- Clarke, A. (1996). Beyond recognition: Trails for transportation and liveable communities. *Trends*. 33(2): 25-29.
- Cope, A., & Doxford, D. (1997). *Visitor Monitoring of the C2C Cycle Route: Analysis of the Results from 1996*. School of the Environment, University of Sunderland. Sunderland, England.
- Cope, A., Doxford, D., & Hill, T. (1998). Monitoring tourism on the UK's first long-distance cycle route. *Journal of Sustainable Tourism*. 6(2): 210-223.
- Cushing, S. (1997). The tourism potential of the national cycle network routes. *Tourism Society Seminar*. 20th October, London.
- Cycling Australia (2005). *Australian Cycling Federation /Mission*, <http://www.cycling.org.au/AM/Template.cfm?Section=Mission> (accessed 9/1/06).
- Department of Industry, Tourism and Resources (2003). *Tourism White Paper*. Australian Government: Canberra.
- EcoGIS (2002). *Submission on Cycle Tourism to the Tourism Strategy Group*, <http://www.cyclingpromotion.com/Tourism%20submission.pdf> (accessed 4/11/05).
- European Cyclists Federation. (1998). *Eurovelo*. <http://www.dcf.dk/ecf/html/eurovelo.htm>. (accessed 24/6/98).
- Harvest Cycle, (2005), *Harvest Cycle – Home*, <http://www.harvestcycle.com.au/home.htm> (accessed 16/1/06)
- Holden High Country Cycle Challenge (2005). *Holden High Country Cycle Challenge*, <http://www.highcountrycyclechallenge.com.au/index.html> (accessed 16/1/06).

- Hoyt, S., & Lumsdon, L. (1993). *Cycle Opportunities*. Simon Holt Marketing. Manchester.
- Hunter Cycling Network (2005). *Cycle Tourism in the Hunter Region*, (Report prepared by Arup Consultants). September: Millers Point.
- Iles, L., & Wiele, K. (1993). From rails to trails: The benefits of rail-trails and greenways. *Recreation Canada*. 51(5): 25-28.
- Jackson, & Morpeth, N. (1999). Local Agenda 21 and community participation in tourism policy and planning: Future or fallacy. *Current Issues in Tourism*. 2(8): 1-38.
- Janeczko, B., Mules, T. and Ritchie, B (2000), *Summer in the Snowies: A Comparative Analysis of the Economic Impact of Four Summer Event in the NSW Snowy Mountains*, CRC for Sustainable Tourism: Gold Coast.
- Kaylen, M., Bhullar, H., Vaught, D., & Braschler, C. (1993). Rural landowners' attitudes towards the Missouri River state trail. *Journal of Leisure Research*. 25(3): 281-289.
- Leiper, N. (1989). *Tourism and Tourism Systems* (Occasional Paper No. 1). Massey University. Palmerston North.
- Lumsdon, L. (1996). Cycle tourism in Britain. *Insights*. March: D27-D32.
- Lumsdon, L. (2000). Transport and Tourism: Cycle Tourism – A Model for Sustainable Development, *Journal of Sustainable Development*, 8 (5), 361-377.
- Moore, R., Graefe, A., Gitelson, R., & Porter, E. (1992). *The Impacts of Rail Trails: A Study of the Users and Property Owners from Three Trails*. Rivers, trails, and conservation assistance program, National Park Service. Washington, D.C.
- Moore, R., Graefe, A., & Gitelson, R. (1994). Living near greenways: Neighboring landowners' experiences with and attitudes toward rail-trails. *Journal of Parks and Recreation Administration*. 12(1): 79-93.
- Morpeth, N. (2000). Diversifying Wine Tourism Products: An Evaluation of Linkages Between Wine and Cycle Tourism. In: C. M. Hall, L. Sharples, B. Cambourne, & Niki Macionis (Eds.), with R. Mitchell & G. Johnson. *Wine Tourism Around the World: Development, Management and Markets*. (pp. 272-282). Butterworth-Heinmann, London.
- Munda Bididi Trail Foundation (2005). *Cycle Tourism: A New Tourism Market Emerges in Western Australia*, http://www.mundabididi.org.au/cycle_tourism/images/cthires.pdf (accessed 4/11/05).
- New South Wales Coastal Cycleway Program (2005). *NSW Coastal Cycleway Program*. Office of Coastal, Rural and Regional NSW, NSW Department of Planning

Parks and Wildlife Service (2005). *The Tasmanian Trail*. Tasmanian Department of Tourism, Parks, Heritage and the Arts, <http://www.parks.tas.gov.au/recreation/ttmap.html> (accessed 9/1/06).

Pedal Power ACT (2005). *Pedal Power ACT: Canberra and Region Cycling*, <http://www.pedalpower.org.au/about/index.asp?IntContId=119> (accessed 5/1/06).

Pedal Tours (2005). *Pedal Tours*, <http://www.pedaltours.co.nz/content1.aspx> (accessed 4/1/06).

Railtrails Australia (2005). *Railtrails Australia Home*, <http://www.railtrails.org.au> (accessed 3/11/05).

Raw NRG (2005). *Press Release: Thredbo awarded the 2006 Mountain Bike Australia National Downhill & Mountain Cross Championships*, http://www.thredbo.com.au/images/adminuploads/document_mgmt/UploadFolder/PR%20Nationals%202006.pdf (accessed 19/1/06).

Remote Outback Cycle Tours (2005). *ROC Tours: Now That's Adventure*, <http://www.cycletours.com.au/home/home.htm> (accessed 4/1/06).

Ritchie, B.W. (1998). Bicycle Tourism in the South Island of New Zealand: planning and management issue, *Tourism Management*, 19 (6). 567-582.

Ritchie, B.W. (1999a). *Cycle Tourism in the South Island of New Zealand*. Unpublished PhD Thesis, Commerce Department, University of Otago, New Zealand.

Ritchie, B. W., & Hall, C. M. (1999b). Bicycle tourism and regional development: A New Zealand case study. *Anatolia: An international Journal of Tourism and Hospitality Research*, 10 (2): 89-112.

Ritchie, B., & Jay, G. (1999). Local Agenda 21 and Community Participation in Tourism Policy and Planning: Future or Fallacy. *Current Issues in Tourism*. 2 (1): 39-46.

Roy Morgan Research (2005). *Holiday Tracking Survey, July 2004-June 2005* (Data provided to researchers by Tourism Australia).

Schieven, A. (1988). *A study of cycle tourists on Prince Edward Island*. Unpublished Masters Thesis. University of Waterloo, Ontario, Canada.

Scottish Tourism Board. (1991). *Tourism Potential of Cycling and Cycle Routes in Scotland*. Scottish Tourism Board. Glasgow.

Simonsen, P., & Jorgenson, B. (1996). *Cycling tourism: Environmental and Economical Sustainability?* Unpublished Report, Bornholm Research Center. Fjellerup, Denmark.

- Smith Family (2005). *Around the Bay in a Day*,
<http://www.smithfamily.com.au/index.cfm?pid=2531&pageid=2660&sid=2686>
 (accessed 16/1/06).
- South Australian Trails (2005a). *Top Trails: Mawson*,
http://www.southaustraliantrails.com/top_trails.asp?mawson (accessed 9/1/06).
- South Australian Trails (2005b). *Top Trails: Riesling*,
<http://www.southaustraliantrails.com/pdf/riesling.pdf> (accessed 9/1/06).
- South Australian Tourist Commission (2002). *Fast Facts: Cycling Tourism Fact Sheet*. November 2002. <http://www.tourism.sa.gov.au> (accessed 9/1/06).
- Sustrans (1999). *Sustrans Information Sheets*,
<http://www.sustrans.org.uk/webfiles/Info%20sheets/ff28.pdf> (accessed 8/1/06).
- Tasmanian Trail Association (2005). *The Tasmanian Trail Association Newsletter*, April 2005, http://www.parks.tas.gov.au/recreation/tastrailnews/tnews_april2005.pdf
 (accessed 9/1/06).
- Tourism Australia (2005). *Cycle Tourism*,
<http://www.tourism.australia.com/Markets.asp?sub=0338&al=1567> (accessed 2/11/05).
- Wilderness Bike Ride Association (2005). *Event Report: Errinundra-Snow 2005* (unpublished report). WBRA.
- Wilderness Bike Ride Association (2004a). *About Us*,
<http://www.wildernessbikeride.com.au/about.htm> (accessed 4/1/2006).
- Wilderness Bike Ride Association (2004b). *Event Report: Errinundra to the Snowy 2004* (unpublished report). WBRA.
- Wildside MTB (2005). *Wildside MTB 2005 Event Report*. (unpublished report)
- Wollongong City Council (2005). *City of Wollongong Bicycle Plan 2005-2010 (Draft)*, <http://www.wollongong.nsw.gov.au/Downloads/Documents/27538-05BikeBookletS.pdf> (accessed 17.1.06).
- World Tourism Organisation. (1991). *Resolutions of International Conference on Travel and Tourism, Ottawa, Canada*. World Tourism Organisation. Madrid.

10. Appendix A – Tour Operators

The following table contains a list of companies that run cycling tours in Australia, as well as the length of these tours and the state in which the tours take place. This is not a comprehensive list of all tour operators offering cycling tours, but a compilation of information gathered to date.

Company	Length	Tours
Back Pedal Tours	2 - 7 days	NSW
Bandicoot Bicycle Tours	1 day	QLD
Barossa Cycle Tours	8 days	SA
Bike About	3 - 5 days	SA
Boomerang Bicycle Tours	half day-7 days	NSW and Vic
Brake Out Cycling Tours	half day	Tasmania
Brindabella Bike Tours	half day - 3 weeks	ACT, NSW and Vic
Bushsports Guided Bicycle Tours	1 day	NSW
Grapemobile Bicycle Hire and Tours	Half day	NSW
Green Island Tours Tasmania	19 days	Tasmania
Island Cycle Tours	half day - 10 days	Tasmania
Outbike	10 - 30 days	South Australia
Pedal Oz	2 days	Western Australia
Real Fun	1 day	ACT
Remote Outback Cycle (ROC) Tours	4 - 32 days	Vic, SA, NT, WA
Terry's Cycling Adventures	4-15 days	NSW, VIC, QLD
Wilderness Bike Ride Association	4 days	Vic
Barking Gecko MTB Tours	half day - full day	SA
Dirty Detours (MTB)	half day - full day	WA
Xterra Adventures	half day - multi day	NSW
Dan's Mountain Biking	half day - full day	QLD
Mountain Bike Tours	1 day and multi-day	NSW
Bushranger Bikes Cycling Adventure Tours	half day - full day	QLD
International Companies		
Pedal Tours (NZ)	3 - 18 days	Vic, Tasmania and QLD
ExperiencePlus! Specialty Tours Inc. (USA)	8 - 18 days	Vic and Tasmania

11. Appendix B – List of Rail Trails

The following list of rail trails in Australia is sourced from the RailTrails Australia website.

(* indicates rail trail is still under development, or partially developed; ** indicates a proposed rail trail.)

	Distance	Location
Victoria		
Ballarat - Skipton Rail Trail	54km	Western Victoria
Bass Coast Rail Trail	16kms	Gippsland
Belgrave Railway Trail	5km	Melbourne Metropolitan
Bellarine Peninsula Rail Trail	32.5km	Melbourne Metropolitan
Camperdown - Timboon Rail Trail	22km	Western Victoria
Domino Trail	4km	Western Victoria
Dookie Rail Trail*		Northern Victoria
East Gippsland Rail Trail	59kms	Gippsland
Gippsland Lakes Discovery Trail	25.5kms	Gippsland
Grampians Rail Trail	1km	Western Victoria
Great Divide Rail Trail	4km	Western Victoria
Great Southern Rail Trail	49kms	Gippsland
Hamilton to Colerain Rail Trail *	34km	Western Victoria
Hawthorn to Kew Rail Trail	1km	Melbourne Metropolitan
High Country Rail Trail	32km	Northern Victoria
Inner Circle Rail Trail	4km	Melbourne Metropolitan
Lilydale to Warburton Rail Trail	38km	Melbourne Metropolitan
Marysville Tram Lines	4km	Northern Victoria
Mirboo North - Boolarra Rail Trail	13kms	Gippsland
Moe-Yallorn Rail Trail	8km	Gippsland
Moondarra Rail Trail	7km	Gippsland
Mt Samaria Tramway	3km	Northern Victoria
Murchison - Rushworth Rail Trail	2km	Northern Victoria
Murray to Mountains Rail Trail	97km	Northern Victoria
Noojee Trestle Bridge Rail Trail	2.5km	Gippsland
O'Keefe Rail Trail	19km	Northern Victoria
Old Beechy Trail	45km	Western Victoria
Outer Circle Rail Trail	18km	Melbourne Metropolitan
Plain Creek Tramway Trail	3km	Northern Victoria
Powelltown Tramway	43.5km	Melbourne Metropolitan
Red Hill Rail Trail	6.5km	Melbourne Metropolitan
Rosstown Railway Heritage Trail	7km	Melbourne Metropolitan
Sandridge Railway Trail	5km	Melbourne Metropolitan
Tallarook - Mansfield/Alexandra Rail Trails	6kms	Northern Victoria
The Bunny Rail Trail	1km	Western Victoria
Tyers Junction Rail Trail	11km	Gippsland
Walhalla Goldfields Rail Trail	7km	Gippsland
Warnambool to Port Fairy Rail Trail**	29km	Western Victoria
Webb Dock Bridge	.5km	Melbourne Metropolitan
Whitfield to Wangaratta Rail Heritage Trail*	48km	Northern Victoria

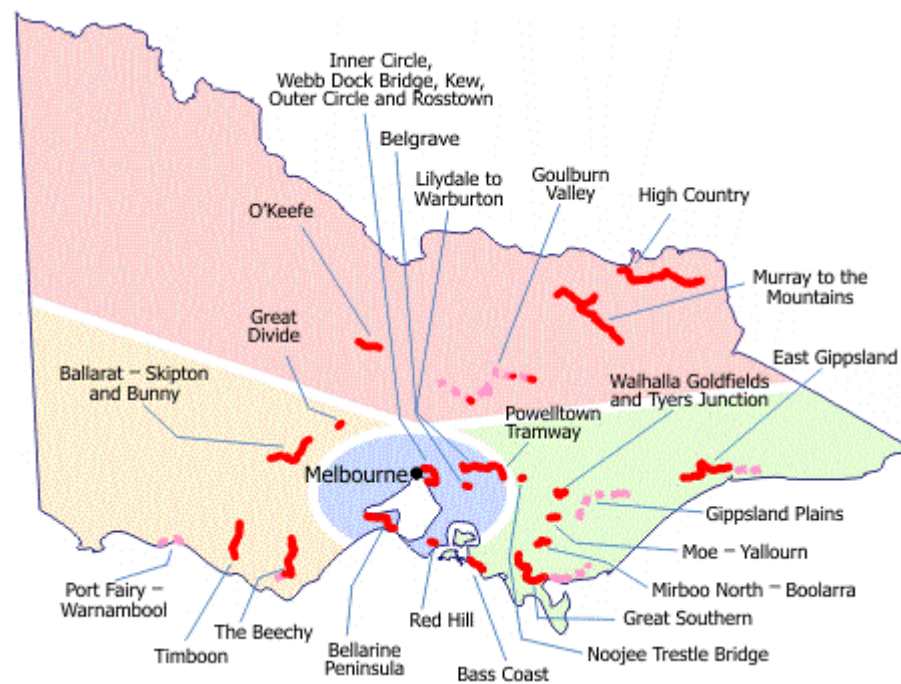
	Distance	Location
New South Wales		
Fassifern to Toronto Rail Trail	5km	near Newcastle
Fernleigh Track	5km	near Newcastle
Awaba - Wangi Wangi Rail Trail	10km	near Newcastle
Oberon - Tarana Rail Trail*		Blue Mountains
Cowra - Eugowra Rail Trail**		Mid-Western NSW
Goulburn - Crookwell Rail Trail**		Southern Highlands
Bungendore - Captains Flat Rail Trail**		Southern Highlands
Riverina Highlands Rail Trail**		Riverina
Culciarn - Corowa Rail Trail**		Southern NSW
Meadowbank Railway Bridge	.5km	Sydney
Parramatta to Liverpool Rail Side Trail	17km	Western Sydney
Coomo Railway Bridge	.5km	Sydney
Box Vale Tramway Trail	4.5km	Southern Highlands
Mount Victoria Tramways	2km	Blue Mountains
Wolgan Valley Heritage Trail	11km	Blue Mountains
Northern Territory		
Darwin Rail Trail	22km	Northern Territory
Katherine Rail Trail	1km	Northern Territory
Queensland		
Atherton Tablelands Rail Trail*		Atherton Tableland
Boolboonda Tunnel	3km	Queensland
Brisbane Valley Rail Trail	9km	South East Queensland
Caboolture-Wamuran Rail Trail*	5km	Caboolture
Hervey Bay - Links Mobility Corridor	5km	Hervey Bay
Irvinebank Rail Trail**		Cairns
Irwin Track Rail Trail**		Queensland
Mt Garnet to Lappa Junction	55km	Mt Garnet
Muntapa Tunnel	.6km	Queensland
South Australia		
Clare Valley Riesling Trail	27km	South Australia
Coast to Vines Rail Trail	34km	South Australia
Farming Heritage Trail	23.5km	Western Australia
Gladstone - Laura - Wilmington Rail Trail	3km	
Old Ghan Heritage Route	1050km	South Australia
Outbank - Mount Pleasant Rail Trail**		South Australia
Westside Bike Path	7km	South Australia

	Distance	Location
Western Australia		
Busselton-Flinders Bay Rail Trail	18km	Western Australia
Carnarvon Tramway	3km	Western Australia
Collie-Darman Rail Trail	47km	Western Australia
Denmark to Nornalup Heritage Trail	33km	Western Australia
Hopetoun - Ravensthorpe Railway Heritage Walk	39km	Western Australia
Jarahdale Timber Tramway	7km	Western Australia
Kalamunda Zig Zag Trail	3km	Western Australia
Munda Biddi	332km	Western Australia
Old Timberline Trail	22km	Western Australia
Railway Reserves Heritage Trail	28km	Western Australia
Ten Mile Brook Trail	7.5km	Western Australia
Wilson Inlet Heritage Trail	7.5km	Western Australia

12. Appendix C – Location of Rail Trails

The following maps illustrate the location of rail trails in each state. All maps are sourced from the RailTrails Australia website.

Rail Trails in Victoria



Rail Trails in Northern Territory



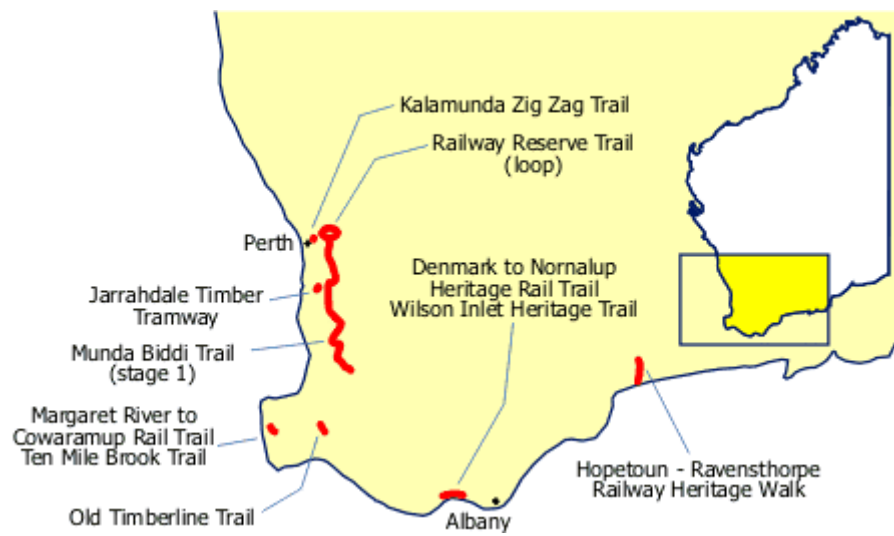
Rail Trails in South Australia



Rail Trails in Queensland



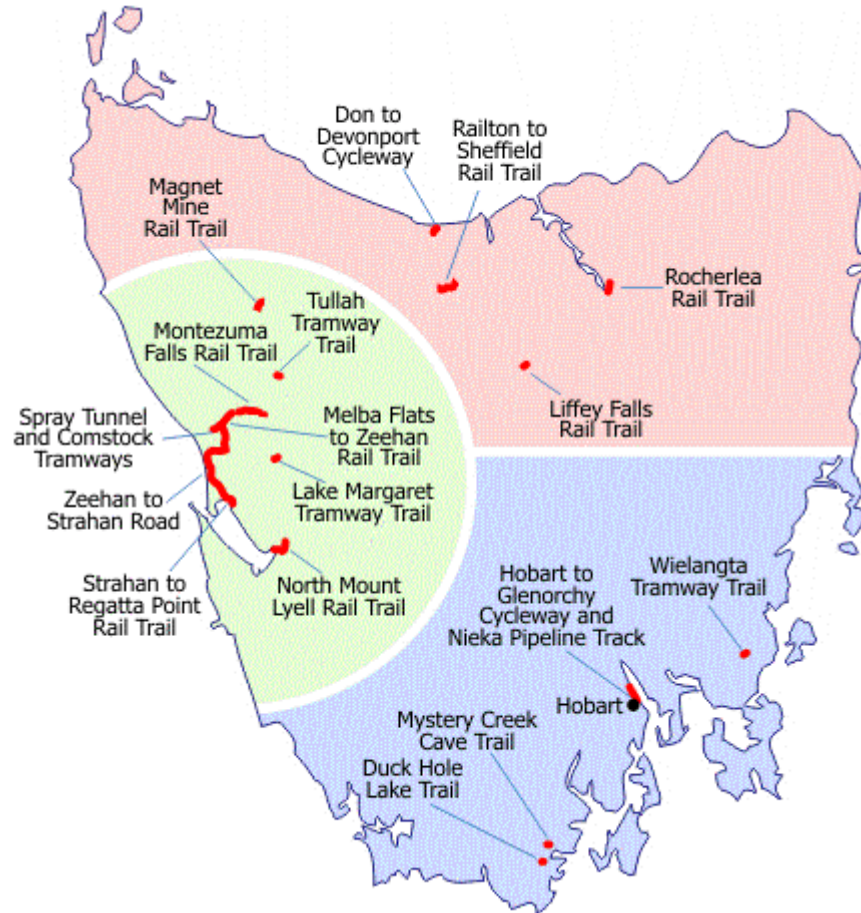
Rail Trails in Western Australia



Rail Trails in NSW and ACT



Rail Trails in Tasmania



13. Appendix D – Events

The following is a list of single and multi-day participative cycling events and includes both mountain biking and road cycling events. This list is by no means comprehensive, with not all events listed, and not all listed events being run annually. However, the list does serve to give an overview of the range of events open to cyclists in Australia, and an indication of the scope of one source of cycle tourism.

Event	Days	Distance	From	To	No of Participants
Alpine Classic	1 day	70-200km	Bright, Victoria		
Around the Bay in a Day	1 day	50/100/210 km	Port Phillip Bay, Victoria		10,000
Be Active Tour	1 day	73/150km	South Australia		<2,000
Bicycling Australia Challenge	6 days	750 km	Coffs Harbour	Mooloolaba	
Bikes and Spikes Carnival	1 day		Hobart	Marrawah	200
Brindabella Challenge	3 days	multi-event	Canberra		1,600
Broken Hill - Swan Hill	6 days (+1.5 days bus)	620 km	Broken Hill	Swan Hill	
City of Perth Great Bike Ride	1 day	10/53/106km	Perth		1636 (53km); 151 (106km)
Coast to Coast	7 days	780km	Cairns	Karumba	180
Cycle Queensland	9 days	560km	Goondawindi	Gold Coast	1,100
Dungog PedalFest	3 days		Dungong		400
Fitz's Challenge	1 day	50/100/150/210kms	Canberra		250
Great Divide Ride	1 day	180km	Melbourne		500
Great Tasmanian Bike Ride	9 days	576km	Tasmania		1,100
Great Victorian Bike Ride	9 days		Regional Victoria		4,000
Harvest Cycle	3 days		Coal River Valley, Tas		120

Event	Days	Distance	From	To	No of Participants
Hobart to Marrawah and Return 1,200 Randonnee	4 days	1,200km	Hobart		
Jayco Tour of Tasmania	5 days				
MS Sydney Gong Bike Ride	1 day	52/54/88km	Sydney	Wollongong	6,000
NSW Big Ride	9 days		Regional NSW		
Outback Odyssey	14 Days	888km	Adelaide	Blinman	
Penny Farthing Century Ride	1 day	162 kms (100 miles)/30km	Evandale Village, Tasmania		40-50
Pepper's Hidden Vale Cycling Epic (MTB)	2 days	100km	QLD		1,000
Seven Hills Dash - Long Distance Bicycle Ride	1 day	210 kms	Hobart		
Tracks of My Tiers	1 day	70kms	Margate Tasmania		
Wildside MTB	4 days	200km	Cradle Mountain	Strahan	250-300
Main Roads LifeCycle Great Western Australian Bike Ride	14 days	827km	Albany	Perth	>2000

