



South Australian Tourism Commission

Cycle Tourism *Strategy* 2005-2009



Introduction

Cycling and cycle tourism are undergoing significant growth worldwide, particularly in SA's key overseas markets. From a strategic perspective it is clear cycle tourism is a major niche tourism opportunity.

A Cycle Tourism Strategy can strengthen South Australia's tourism industry by leveraging the State's high profile cycling events and adding value to existing tourism activities by incorporating the various cycling initiatives under Brand SA.

This South Australian Tourism Commission (SATC) strategy has been developed in consultation with the Office for Recreation and Sport, the Office for Cycling and Walking of the Transport Planning Agency of the Department of Transport and Urban Planning, Bicycle SA, the Southern Flinders Regional Tourism Authority and cycle tourism operators.

The **Jacob's Creek Tour Down Under (JCTDU)**, now in its seventh year, is Australia's premier international cycling event and attracts around 100 of the world's best road cyclists. The event, owned and managed by Australian Major Events – the events division of the SATC – continues to grow in size and stature, achieving crowd numbers of 495,000 in 2005, with television highlights broadcast in Europe, USA, Asia and around Australia.

The accompanying *be active tour* sponsored by the Office for Recreation and Sport and presented by *The Advertiser*, attracted more than 1900 recreational riders in 2005 – up from 1400 in 2004.

Along with the JCTDU and its extensive associated events program, including the SA Classic Veterans' Race Series and Men's and Women's Criteriums, SA also hosts the **Australian Open Road Championships (AORC)** in January 2005 and 2006.

Other mass participation events in SA include the **Coast to Coast** (February, Glenelg-Victor Harbor), **Sea to Vines** (November, Glenelg-Nuriootpa) and cycling events held as part of the **10th Australian Masters Games** in 2005 and the **World Police and Fire Games** in 2007.

The *South Australian Tourism Plan 2003-2008* notes that cycling is one of the most popular recreational activities for local people and visitors, and that it is "... an important complement to the drive market, whether in the mass market or niche sense."

The State's *Responsible Nature-based Tourism Strategy 2004-2009* also illustrates this strategic imperative:

Cycling in particular is an under-rated opportunity in SA. We can however leverage our Jacob's Creek Tour Down Under fame to achieve a significant competitive advantage. One of the key trends in the consumer market is the growing interest in the outdoors and healthy lifestyles. Cycling is a key opportunity in this regard, as it appeals to the general market and a significant global niche market of dedicated cyclists.

The Federal Government's recent *Tourism White Paper* notes that "the (cycle tourism) niche ... is an ecologically sustainable tourism product, which is expected to grow in popularity".

An important focus for this strategy will be to support key priorities for cycle tourism in South Australia, including further leveraging the JCTDU and its associated events and developing/promoting initiatives in regional South Australia.

Community, business and industry involvement and engagement will be an essential component in the strategy's success.



The SATC Vision

Core Theme

For South Australia to provide outstanding cycling lifestyle experiences for the benefit of our visitors and residents.

Description

Within a decade, SA will be synonymous with cycle tourism and be known as the home of Australian cycling.

The Jacob's Creek Tour Down Under, already being developed as Australia's 'festival of cycling' is proving to be one of the world's favourite cycling events and will position SA's lifestyle and cycling experiences at a competitive level, both nationally and internationally.

South Australia will be one of the most appealing cycle tourism destinations in the world, set apart by its excellence in urban design, integration with the natural environment, human scale, liveability and ease of movement.

A number of regional areas will be desirable cycling destinations, attracting visitors with a wealth of landscape variety, attractions and opportunities for cycling adventures and enabling visitors to see Australia in a "Different Light", as promoted by Tourism Australia.



Jacob's Creek Tour Down Under, Aldinga Beach,
Fleurieu Peninsula

The Imperative

SATC research indicates that cycle tourism is a high-yield market of primarily white collar workers who use all types of accommodation and rely on cafés, bakeries and restaurants along the route for supplies.

Although definitive economic data for cycle tourism in Australia is limited, the following research findings give an indication of its potential:

- In 2003, 10 800 tourists travelled to South Australia specifically to be a part of the **Jacob's Creek Tour Down Under**, generating a total net economic benefit of \$12.5 million and the equivalent of 207 full-time jobs.
Australian Major Events
- A recent study has shown that the **Riesling Trail** contributes an estimated \$1.08 million of direct expenditure annually to the Clare Valley region.
Trails Research Project, Market Equity, June 2004
- Bicycle SA's **Outback Odyssey**, held during the Year of the Outback in 2002, contributed over \$0.5 million directly to the local economy.
Bicycle SA Evaluation Report 2002
- Cycle tourist numbers in **Tasmania** doubled between 1997 and 2003.
Tourism White Paper, Tourism Australia 2004
- The development and promotion of cycle tourism also provides an opportunity to capitalise on similar trends in Europe, New Zealand, Canada and the US:
- The economic value of cycle tourism in **Europe** is forecast to be £14 billion per annum by 2020.
Sustrans, 1999
- **Britain** estimates cycle tourism brings £635 million per year to the economy. Its most popular long distance cycle route, the C2C (sea-to-sea), attracts over 15,000 holiday makers annually and has won two international tourism awards.
Sustrans, 1999
- In **Denmark**, it is estimated that 53,000 cycle tourists visit the islands of Fyn and Bornholm annually, accounting for 477,000 bed nights.
Ritchie, 1998
- **Austria's** Danube cycle route attracts 1.5 million visitors per year. In typical towns on the route, the majority of overnight visitors are cyclists.
Cycle Tourism Solutions
- In **Ireland**, 9% of overseas holiday makers participate in cycling, with one third of these engaging in touring holidays for longer than 15 nights.
Ritchie, 1998



be active tour, 2005

Definition

The SA Government is committed to promoting cycling as a legitimate form of transport and healthy lifestyle activity. It has made a substantial investment in cycling initiatives. Cycle plans are being developed in many key regional cities and towns.

Cycle tourism is also listed as an important niche in the following plans and strategies:

South Australian Tourism Plan 2003-2008

Government of South Australia

Responsible Nature-based Tourism Strategy 2004 – 2009

South Australian Tourism Commission / Department for Environment and Heritage

Southern Flinders Ranges Cycle Tourism Strategy

Southern Flinders Ranges Tourism Authority

State Mountain Bike Plan for SA (Mount Lofty Ranges Region) 2001-2005

Government of South Australia

Recreational Trails Strategy for South Australia 2005-2010

Government of South Australia

SA's Draft Transport Plan 2003

Government of South Australia

Australia Cycling – National Strategy 1999-2004

Australian Bicycle Council

Tourism White Paper: A Medium to Long Term Strategy for Tourism

Commonwealth of Australia, 2003

Strategy and Action Plan for Cycling in South Australia 2001-05 (Draft)

State Cycling Council

Strategic Bicycle Plan 2003

Adelaide City Council

‘Cycle tourism visits are considered to be for the purpose of holidays, recreation, pleasure or sport; and to include either overnight stays, or day trips to other tourism regions during which the visitor either engages in active cycling, or is a spectator at a cycling event.’

(Note: This definition *excludes* activities that are essentially non-tourist in nature, ie cycle commuters; recreational and sporting cyclists who are active within their own region; and spectators at events held within their own region.)

There are many ways to group cycle tourists. SATC research has previously categorised cycle tourists according to their degree of commitment to the activity, ie *dedicated*, *interested* or *incidental* cyclists. Cycling is the primary reason for visiting a region for *dedicated* cyclists and for some of the *interested* group, but only a secondary reason for the balance of the *interested* group and the *incidental* group.

However, in order to identify potential cycle tourism markets for South Australia, segmentation into discrete activity groups may be necessary. The following table illustrates one such method of classification.



The Store, North Adelaide

Cycle Tourism Market

Sub-groups	Touring cyclists	Event cyclists	Mountain bikers	Recreational cyclists	Event spectators	Leisure cyclists
Cycling as a trip motivator	Primary	Primary	Primary or Secondary	Primary or Secondary	Primary or Secondary	Secondary
Characteristics	<ul style="list-style-type: none"> • Relatively small market • High fitness levels • Longer trips • Own bikes • Guided or independent • Cycle for transportation and recreation • Accommodation needed en route • Usually no children 	<ul style="list-style-type: none"> • High fitness levels • Own bikes • Recreational or competitive events • Road or mountain bike events 	<ul style="list-style-type: none"> • Adventure market • Generally younger, male • Fitter than recreational, leisure cyclists • Own bikes • Mostly destination mountain biker tourists (regular riders) • Some come for competitive events 	<ul style="list-style-type: none"> • Multi-use trails, bike lanes and secondary road network • Guided tours, some independent (longer than leisure cyclists) • Mostly rented bikes, some bring own • Family participation 	<ul style="list-style-type: none"> • Mainly domestic market • Mainly competitive events, eg JCTDU • Family, friends of recreational event participants • May also ride in <i>be active tour</i> or do other cycle touring while here 	<ul style="list-style-type: none"> • Largest market • Occasional cyclists • Short, guided tours and rented bikes • Multi-use trails, bike lanes and secondary road network • Family participation
Potential activities:						
Road/trail touring	✓	✓		✓	✓	✓
Road events		✓			✓	
Off-road touring	✓	✓	✓	✓	✓	
Off-road events		✓	✓		✓	

Source: SATC modification of a classification system developed by the Canadian organisation Cycle Tourism Solutions



The Market Opportunity

South Australia has significant competitive advantages in terms of providing a first-class environment for cycle tourism:

Further leveraging the Jacob's Creek Tour Down Under

The Jacob's Creek Tour Down Under is one of the State's most colourful and exciting events. Continued leveraging will ensure that its international profile, as well as popular interest and emotion in the event, continue to grow, providing further opportunities to promote the State as a desirable destination for cycle tourism.

Terrain and Climate

South Australia has a terrain and climate ideal for cycling, which is a significant competitive advantage. Throughout the year, SA offers both safe and easy or more challenging routes throughout regional SA.

Leveraging South Australia's Cycling Connections

SA has a strong connection with competitive cycling. Identities such as Stuart O'Grady, Jay Sweet, Luke Roberts, Patrick Jonker, Mike Turtur and Charlie Walsh provide further opportunities to establish a competitive edge.

Leveraging State Recreation Initiatives

A key part of the State's tourism strategy is to link, leverage, or value-add to other initiatives in order to achieve relevance and authenticity. Existing opportunities include Adelaide City Council's free bike scheme (*City Bike*), *Adelaide Parklands Recreation Ring Route*, *Coastal Linear Park*, *Torrens Linear Park*, *MOSS* network of open space and the growing network of cycling routes and trails such as the *Riesling Trail*, *Encounter Bikeway* and *Mawson Trail*.

Healthy Lifestyle

One of the key trends in the consumer market is the growing interest in the outdoors and healthy lifestyles. Cycling is a key opportunity in this regard. This can be pursued as a preferred form of recreational activity or as a different way of experiencing South Australia.

A Niche Opportunity

International travel guide publisher Lonely Planet sells a series of guides on cycling tourism, including one for Australia. This is a good indication of the segmentation of the market and the emerging niche opportunities. The popularity of cycle tourism in South Australia's major markets of the UK and Europe provides an ideal niche-to-niche opportunity.

Leveraging 'Brand Australia'

Tourism Australia's 'Brand Australia' focuses on Australia's great outdoors and sense of freedom. The cycling experience is a natural fit with its 'Australia. A Different Light' brand notions of space, nature and freedom.

The above factors present a strong case for the SATC to develop cycle tourism. It represents a clear opportunity to add value to South Australia's lifestyle attractions in both domestic and international markets.



Riesling Trail, Clare Valley

Market Positioning

South Australia's tourism positioning centres around *lifestyle, good living, events, unspoiled nature* and *accessibility*. There is great potential for cycling to connect many of South Australia's tourism assets and strengths.

To establish a market position as a unique and desirable destination for cycle tourism, South Australia needs to create one or more points of difference in the mind of the potential cycle tourist.

To provide maximum differentiation between South Australia and its cycle tourism competitors, cycle tourism market positioning should be focused on the following:

- Further leveraging the **Jacob's Creek Tour Down Under** – Australia's premier international cycle touring race and its associated events, especially the *be active* tour.
- Adding value to SA's **Wine/Food, Coastal** and **Outback** experiences, eg promoting Bicycle SA's **Outback Odyssey**.

Target Markets

In the marketing context, one of the primary benefits of promoting cycle tourism in South Australia will be **adding value to existing tourism markets**.

Promotional activities should generally concentrate on SA's existing tourism markets, which include the high-value segments of the key **domestic markets** of Melbourne, Western Victoria, Sydney, Brisbane and South Australia – as well as SA's key **international markets** of Western Europe, USA, New Zealand, Asia and Japan.

Since most of these markets have established cycle tourism activity and traditions, promoting cycle tourism in SA can be seen as a natural extension to current SATC marketing strategies that target these markets.

To support the bulk of sub-groups identified in the cycle tourism definition, the general approach would be to include relevant cycling content in brochures, intrastate and interstate marketing campaigns, regional visitor guides, the list of 'must see & dos' and on *southaustralia.com*.

In addition, targeted marketing should be considered for the more dedicated 'touring cyclists' and 'mountain bikers' sub-groups, in the form of direct mail, e-marketing and advertising in specialty cycle and trail magazines.

Mutually beneficial marketing links can also be established with those niche areas that have an affinity with cycle activities and in which South Australia has a competitive advantage, such as the wine/food, nature-based and backpacker markets.

In the category of niche-to-niche marketing, targeted strategies can be developed to tap into the membership of cycle touring associations in major interstate and international markets.



Cycle Tourism in SA Regions

The table below details those exhibiting significant current activity and/or future potential.

Note: cycle tourism can occur in any region.

Region	Destination	Focus	Infrastructure Strengths / Weaknesses
Adelaide metropolitan area	Adelaide	Events, recreational cycling – road & leisure trails	Road network, leisure trails, proximity to services and accommodation <i>Trail development including maps, interpretation, tourist support</i>
Southern Flinders Ranges	Melrose	Mountain bike, soft adventure	Accommodation, access to food and dining outlets, community support <i>Trail development</i>
Central Flinders Ranges	Wilpena, Blinman	Mountain bike, soft adventure, epic adventure	Existing cycle tourism operators and product, scenery, regional events <i>Accommodation, trail development</i>
Clare Valley	Auburn, Mintaro, Clare, Riverton and Kapunda	Mountain bike, touring, soft adventure	Wine and food product, accommodation, trail information, community support, regional events <i>Toilets, car parking, trail connections</i>
Barossa	Kapunda to Angaston and down to Mt Pleasant and Williamstown	Road cycling, touring	Wine and food product, accommodation, scenery, major events <i>Lack of cycle tourism operators, specific route and product information</i>
Fleurieu Peninsula – Adelaide Hills	Birdwood across to Kersbrook and down to Goolwa and Cape Jervis	Road cycling, touring	Wine and food product, scenery, road network, major events <i>Lack of cycle tourism operators, specific route and product information</i>
Adelaide Hills	Eagle Mountain Bike Park, Cudlee Creek	Mountain bike – sport, events	Trail design and development, scenery, regional events <i>Lack of cycle tourism operators and consumer information</i>
Kangaroo Island	Whole of Island	Touring – off road	Nature-based product, accommodation, scenery <i>Lack of cycling tourism operators, specific route and product information.</i>



Adelaide Superdome, Gepps Cross, Adelaide

Objectives and Strategies

This strategy is consistent with the *SA Tourism Plan 2003-2008*, which emphasises quality of life, clean and green, space, plenty of things to do, connection, learning, health, energy, adventure and challenge.

South Australia will be seen as a place that stands apart for its 'lifestyle' differences and cycle tourism can provide an active alternative to traditional beach and sun tourism.

Objective 1

Position South Australia as Australia's 'top of mind' cycle tourism destination.

- Further leverage from high-profile SA events such as Jacob's Creek Tour Down Under, *be active tour*, Australian Open Road Championships World Solar Cycle Challenge and Outback Odyssey.
- Support the 'Australian Centre for Excellence in Cycle Tourism'.
- Encourage cycle tourism research to better understand the industry.
- Promote and leverage Outback initiatives such as the Outback Odyssey and activities associated with the Mawson Trail.
- Support the Australian Cycle Tourism Conference, Adelaide 2006.
- Attract cycling and related conferences to SA.
- Establish a cycle tourism web page linked to www.southaustralia.com and www.southaustraliantrails.com
- Encourage cycle-friendly improvements to public transport, eg bikes on buses, trains and planes.

Objective 2

Empower the cycling industry, adventure-based operators and others to provide exceptional cycling product.

- Encourage further development of existing trail initiatives such as Southern Flinders mountain bike trail development.
- Establish an International Mountain Bicycling Association (IMBA) 'Epic' trail in SA eg investigate whether the Mawson Trail meets the criteria.
- Encourage further development of mountain bike trails.
- Provide business development support for new and existing cycle tour operators.
- Support trail development that supports key SA tourism themes such as wine and food, heritage and nature.
- Support bicycle-friendly accommodation and services.



Wilpena Pound, Flinders Ranges

Objective 3

Integrate cycling tourism product into marketing activities both within SATC and externally with regional tourism bodies, industry and business.

- Once established, promote an IMBA ‘Epic’ trail to target niche markets.
- Develop cycle tourism marketing strategies for both niche and general markets.
- Bundle cycle tourism opportunities with relevant SATC marketing collateral, such as drive and nature-based marketing materials.
- Link cycle tourism with tourism interpretation opportunities.
- Advise industry on direct marketing opportunities with direct mail, e-marketing, cycle magazines etc.
- Develop cycle tourism product information, including route guides, tour operators and event information for trade shows and consumer publications.
- Promote major cycling events through targeted marketing i.e. advertorials in consumer cycling magazines.
- Conduct familiarisations of established soft and epic adventure products, and potential opportunities, for media representatives and prospective operators.
- Incorporate cycle trails into regional visitor guides.
- Develop and promote cycle touring maps built around Jacob’s Creek Tour Down Under routes, to give recreational cyclists more reasons to attend the event or ride the route at any time throughout the year.

Objective 4

Establish appropriate infrastructure that supports cycle tourism.

- Develop cycle tourism infrastructure, including trail development, signage and accommodation eg in southern Flinders Ranges and Clare Valley regions.
- Investigate permanent signposting of Jacob’s Creek Tour Down Under climbs for the benefit of cycle tourists with relevant information about the climb, such as gradients, start and end points, race facts and history etc.
- In relation to products, events and services, survey consumer expectation pre-event or pre-visit and consumer satisfaction post-event or post-visit to create benchmarks for service quality and customer satisfaction.
- Explore the full range of opportunities on private and public land, including appropriate areas under the care and control of the Department for Environment and Heritage and other State Government agencies.
- Support improvements to public cycle infrastructure, such as bicycle facilities at transport interchanges, bike racks and storage, signage.



Encounter Bay Bikeway, Fleurieu Peninsula

Partnerships

State Government

South Australian Tourism Commission (SATC)
Office for Recreation and Sport (ORS)
Office for Cycling and Walking (DTUP)
Department for Environment & Heritage (DEH)
Forestry SA

Cycle/Tourism Groups

Australian Centre for Excellence in Cycle Tourism
Bicycle Institute of SA Inc.
Bicycle SA (BSA)
Cycling Promotion Fund
Mountain Bike Australia
Riesling Trail Inc.
SA Cycling Federation (SACF)
Southern Flinders Regional Tourism Authority
Veterans Cycling Association (VCA)

Local Government

Metropolitan councils and regional councils with cycle tourism potential.

Operators

All Trails Bicycle Tours (Vic)
Barking Gecko MTB Tours
Barossa Classic Cycle Tours
Bicycle SA
Bike About
Ecotrek
Freeride Oz (Vic)
Italia Spring Tours (NSW)
Rolling Along MTB Tours
Wayward Bus – Outbike program

Retailers

Bicycle retailers
Bike-friendly hotels

Implementation

Subject to budget priorities, responsibility for implementation will rest with the product development and infrastructure areas within the SATC's Tourism Development Group, in conjunction with Marketing to ensure that new product opportunities are incorporated into relevant new marketing campaigns and activities. It should be noted, however, that no specific implementation resources are currently available within the SATC for product development or niche marketing.

Regional tourism bodies will be encouraged to develop and implement local cycle tourism strategies and action plans to complement the SATC strategy.

The SATC will establish processes to monitor, evaluate and review the strategy.



Powerade Mini Tour for kids, 2005

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Bikeway, Middleton, Fleurieu Peninsula

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www.cycletourism.com.au

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www.aorc.com.au

Bicycle Institute of South Australia
www.bisa.asn.au

Bicycle SA
www.bikesa.asn.au

Jacob's Creek Tour Down Under
www.tourdownunder.com.au

South Australian Rail Trails
www.railtrails.org.au/states/sa

South Australian Trails
www.southaustraliantrails.com

Wayward Bus – Outbike
www.waywardbus.com.au/outbike.htm

Interstate

Munda Biddi Trail Foundation
www.mundabiddi.org.au

Great Ocean Road Marketing Inc.
www.greatoceanroad.org/cycling/

National

Australian Bicycle Council
www.abc.dotars.gov.au

Bicycle Australia
www.woa.com.au/ba

Bicycle Federation of Australia
www.bfa.asn.au

Bicycling Australia
www.bicyclingaustralia.com

Cycling Promotion Alliance
www.cyclingpromotion.com/network.htm

Cycling Promotion Fund
www.cyclingpromotion.com

Railtrails Australia
www.railtrails.org.au

Overseas

Country Lanes
www.countrylanes.co.uk

Cycling in Switzerland
www.cycling-in-switzerland.ch

Explore Maine by Bike
www.exploremaine.org/bike

Otago Central Rail Trail
www.otagocentralrailtrail.co.nz

Rails-to-Trails Conservancy
www.railtrails.org

Sustrans
www.sustrans.org.uk



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