

Motorcycle Tourism Strategy 2013-2016



Contents

Message from the Minister	4
Executive Summary	5
Strategic & Policy Context	6
Motorcycling in Victoria	7
Market Overview	8
Action Area One: Marketing of Motorcycle Tourism	11
Action Area Two: Product and Industry Development & Motorcyclist Safety	12
Action Area Three: Motorcycle Events	13
Reporting & Evaluation	14

Message from the Minister

From the spectacular 12 Apostles as a backdrop against the Great Ocean Road, to one of the many picturesque chateaux and vineyards that wind through the Yarra Valley, Victoria's diverse regions and world-class road network are great to tour by motorcycle.

Victoria's *Motorcycle Tourism Strategy 2013-16* ('the Strategy') the first of its kind for the State, was developed by Tourism Victoria in partnership with the Department of Transport and the tourism and motorcycle industries to leverage and enhance opportunities in motorcycle tourism.

Motorcycle tourism has the potential to make an important contribution to the Victorian economy, particularly in regional areas. Motorcycling is the fastest growing road user sector, nationally experiencing eight per cent growth per year over the last decade¹ and 12.5 per cent in sales growth last year alone.²

Additionally, Victoria is well 'on track' to be the country's top destination for motorcycle culture, with Phillip Island hosting two of the top global motor sport series, the Superbike World Championship and the MotoGP, and with Melbourne the only Australian capital city where you can park a motorcycle or scooter on the footpath for free.

The Strategy identifies the tourism potential of motorcycling, while underpinning the overall priority of rider safety. It is part of the Victorian Government's commitment to motorcyclists and will grow the State's \$15.9 billion tourism sector, which includes greater dispersal of visitor expenditure throughout regional Victoria.

Whether you are a motorbike enthusiast or a holidaymaker seeking a new adventure, Victoria offers safe and enjoyable motorcycle touring from standard motorbikes to three person trikes, making it the perfect way to let your hair down and see our great State.



The Hon Louise Asher MP

Minister for Tourism and Major Events

¹ Bureau of Infrastructure, Transport and Regional Economics (BITRE) data

² Australia's motorcycle market in 2012, Federal Chamber of Automotive Industries (FCAI)

Executive Summary

Vision

Victoria will be regarded in key intrastate and interstate markets as the State that offers and supports a diverse range of motorcycle touring experiences. This includes the experiences of visitors at major motorcycling events and touring experiences in the regions.

Motorcycling in Victoria is a popular recreational activity for both intrastate and interstate visitors, positively impacting many of the State's communities and local economies. According to the Australian Bureau of Statistics, in the five years ending January 2011, the number of motorcycle registrations grew at an annual average growth rate of 8.2 per cent, higher than the growth rate of any other vehicle type³. Tourism Victoria's *Motorcycle Tourism Strategy 2013-16* identifies an untapped, niche market, uncovering opportunities and potential for the sector to grow.

Victoria is well placed to position itself as a motorcycle tourism destination. The State has a number of car touring routes, such as the Great Southern Touring Route, the Sydney to Melbourne Coastal Drive and the Great Alpine Road that provide a platform for motorcycling tourism in regional Victoria. Victoria is home to one of the most scenic motorcycle tracks in the world at Phillip Island, hosting the two largest motorcycling events in Australia, the Australian Motorcycle Championship Grand Prix and the World Superbikes Championships.

The *Motorcycle Tourism Strategy 2013-16* is part of the Victorian Government's commitment to motorcyclists. This Strategy identifies the tourism potential of motorcycling, while underpinning the overall priority of rider safety.

This Strategy has been informed by consultation with Department of Transport (DoT) agencies and both the tourism and motorcycle industries, as its implementation can only be achieved through partnerships across Government and the private sector.

Three key areas of focus have been identified:

- 1 Marketing – Further leveraging of the intrastate market.
- 2 Product and Industry Development and Motorcyclist Safety – Identifying the facilities and infrastructure needed to expand motorcycling tourism and ensuring motorcycle tourism has a consistent voice in general tourism issues, keeping safety aspects top of mind.
- 3 Events – Outlining how existing major motorcycle events can be leveraged to attract more motorcycle riders to Victoria and encouraging them to stay on for a touring holiday. This area of focus also supports the tourism potential of smaller, regional events.

³ Source: 2011 Motor Vehicle Census Australia, Australian Bureau of Statistics

Strategic & Policy Context

Strategic Context

Tourism is a major economic driver for Victoria. In 2010-11, tourism directly and indirectly contributed \$15.9 billion or 5 per cent of Gross State Product and employed approximately 204,000 people (latest figures available).

Policy Context

The development of a Motorcycle Tourism Strategy was identified by the Victorian Government and reflected in the 2010 election commitment, *New Approach for Motorcyclists Policy*.

In undertaking consultation for this Strategy, a number of issues were raised, including the growth of motorcycling as a recreational activity. Although recognising this, from a tourism perspective motorcycling remains a niche segment. It should also be noted that the overriding Government priority will continue to be road safety.

Definitions & Scope

The definition of motorcycle tourism is widely accepted to be the activity of visiting a region and/or destination, using a motorbike as the primary form of transportation. It can involve group tours or solo riders, both organised by tour businesses or independently.

Motorcycling is undertaken in a variety of ways and for a range of purposes and in different settings. These include recreational riding, off-road/on-road riding, riding through National and State Parks, commuting, riding in built up/non built up areas and on private land.

For the purpose of this Strategy, motorcycle tourism will focus on on-road recreational riding. This is directly attributed to the Government's 2010 *New Approach for Motorcyclists Policy* and the Department of Transport being charged with maintaining the public road network. In addition, recreational riding on on-road bikes offers the best opportunity for tourism benefits and greater yield in regional Victoria. Although the focus is not on off-road activities, there is still the opportunity for this area to leverage the actions included in the Strategy, e.g. event listing.

The Strategy will also focus on motorcycling events, both major and regional, and visitation at motorcycle-related tourist attractions such as the Grand Prix Visitor Centre at Phillip Island.

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Motorcycling in Victoria

There are a number of organisations that effectively represent aspects of the Victorian motorcycle community. However, there is not a single, unified voice to represent all motorcycling activities. From a tourism industry perspective, no motorcycle tourism operators are current members of the Victorian Tourism Industry Council (VTIC).

It should also be noted that motorcycling plays a significant role in the State's major events calendar. International spectator events are the responsibility of the Victorian Major Events Company and the Australian Grand Prix Corporation, organised on behalf of the State Government.

VicRoads has also established a Motorcycling Advisory Group which includes people from Government road safety agencies, motorcycling industry, retail sector and road users.

General Motorcycle Participation in Victoria

Who is riding in Victoria and what are their characteristics?

In October 2010, the Transport Accident Commission (TAC) undertook the Motorcycle Tracker Research Project, conducted by Sweeney Research. There were 1,755 licensed motorcyclists approached to take part in the Project, resulting in the following findings:

- > Recreational on-road riding constitutes the largest proportion of riding time for motorcyclists. Forty-nine per cent of respondents use their bikes for this purpose, compared to 31 per cent of time riding to commute and 20 per cent of time riding for recreational off-road.
- > Gender wise, the proportion of time spent recreational riding is similar between males and females. Males spend 48 per cent of total riding time recreational riding and females spend 54 per cent of total riding time recreational riding.
- > 55 per cent of riders are aged over 40 years old.
- > Approximately 53 per cent of all riding undertaken in regional Victoria is for recreation on-road purposes. Similarly, 44 per cent of all riding undertaken in Melbourne is for recreation on-road purposes too.

Feedback from consultation with external stakeholders suggests that most recreational riders have unique characteristics that differ from more traditional visitors:

- > They are more likely to make 'spur of the moment' or 'last minute' decisions and are dependent on external factors such as favourable weather and riding conditions.
- > Whilst the towns and destinations that riders visit and pass through are important, the actual experience of getting there is an overarching motivator to travel. The degree of difficulty of the roads taken (i.e., twists and turns) and the opportunity to improve bike handling skills take priority.
- > Riders tend to be in professional occupations, with a high disposable income.
- > They enjoy looking for new routes and destinations to ride to/in.
- > Motorcyclists like to be informed with facts about the destination they are riding to/in, and also the technical detail about conditions of the road.

Motorcycle Incident Statistics

Acknowledging motorcycle incident statistics is important when encouraging and managing motorcycle participation. VicRoads data showing the distribution of motorcycle casualty crashes since 2001 suggests a strong link between population mass and motorcycle crashes, with most weekend incidents generally occurring either within Melbourne or within a 90 minute radius of Melbourne. From a regional tourism perspective, the crash data shows that there is a higher tendency for incidents to occur in the Yarra Valley and the Dandenongs, the Mornington Peninsula, west Gippsland, and along the eastern end of the Great Ocean Road (Geelong, the Bellarine Peninsula and the Surf Coast). The commonality between these regions is that they all receive high interstate and intrastate visitation and are characterised by either coastal scenery or windy, mountainous roads.

The Parliament of Victoria Road Safety Committee tabled its report for the Inquiry into Motorcycle Safety in December 2012. Although acknowledging the positive attitude of most riders, the report still raises concerns as to motorcycle safety, particularly as usage is anticipated to increase in the future.

Market Overview

Motorcycle Tourism Visitor Research

There is minimal data available about recreational riders in a tourism context. Motorcycling as a specific activity is not listed in Tourism Research Australia's quarterly International Visitor Survey or quarterly National Visitor Survey.

Domestic Research

The only source of qualitative data on motorcycle tourism is Roy Morgan Research's Holiday Tracking Survey, July 2009-June 2011. However, as these results contain a relatively small sample of 167 people throughout all of Australia, not solely Victoria, they must be interpreted with caution. The Survey found that only 1 per cent of overnight domestic leisure travellers used a motorcycle as a form of transport on their last domestic holiday.

Other key findings from this survey found that domestic motorbike holidaymakers were likely to do the following, compared to the average domestic overnight holidaymaker.

- > More likely to travel intrastate.
- > More likely to visit multiple destinations on their holiday.
- > More likely to use tents/camping and standard hotel/motels.
- > Less likely to have used the internet to plan their trip.
- > Less likely to have pre-booked elements of their trip (i.e., accommodation).
- > More likely to have undertaken the following activities: wilderness, country/wildlife/scenery, national parks and forests and other outdoor activities.
- > More likely to have had a weekend away in the previous three months.

Roy Morgan's Regional Awareness and Perceptions Study 2011 found that for Phillip Island, motorsport (including the Australian Motorcycle Grand Prix) was the top of mind attraction. Of the total respondents 53.1 per cent mentioned a motorsport event, the Motorcycle Grand Prix or other motorsports, ahead of penguins (51.9 per cent), coastal scenery (11.6 per cent) and natural attractions (10.2 per cent). Specifically, interstate respondents were most likely to associate motorsport events (60.8 per cent) with Phillip Island, ahead of the penguins (49.2 per cent).

Car Touring in Victoria

Linking motorcycling tourism to touring routes is vital as they enable several regional areas within Victoria to work together. Tourism Victoria also heavily promotes established touring routes at international trade shows.

Roy Morgan Research's Brand Health Survey is a key indicator of Tourism Victoria's marketing performance. Conducted annually, the survey measures Victoria's and Melbourne's competitive image or 'brand health' by looking at consumer perceptions of the State's product strengths.

In response to the question of which one State or Territory 'is a great place to tour by car', Victoria has clearly dominated each year since 2001, reinforcing the State's touring potential.

Although there is no specific research on touring by motorcycles, data on car touring provides some indication as to the State's appeal in this space. Motorcycle touring has potential to align with existing car touring marketing activities as both aim to increase consumer demand for regional tourism experiences.

Motorsport events are important to local communities in enhancing economic and social benefits

Tourism Victoria's touring strategy is captured within the Regional Tourism Action Plan 2009-2012. Several car touring routes have been developed for the State, with a heavy focus on three particular routes:

- > The Great Southern Touring Route (Melbourne, Great Ocean Road, the Grampians, Goldfields).
- > The Sydney to Melbourne Touring Routes, comprising the Coastal Drive (Melbourne, Gippsland); Heritage Drive (Melbourne, Goulburn Valley, the Murray) and the Great Alpine Road (linking the Coastal Drive and the Heritage Drive from Gippsland to Victoria's High Country).
- > Melbourne's Southeast Touring Triangle (Yarra Valley and the Dandenongs, Mornington Peninsula, Phillip Island).

The strategic directions for these routes involve further developing the Sydney to Melbourne Touring Routes; providing further assistance to the Great Southern Touring Route (particularly in targeting international markets) and promotion of routes via trade shows and wholesaler representation (in partnership with Regional Tourism Boards).

Motorcycle Events Research

Motorsport events are important to local communities in enhancing economic and social benefits. The Australian Motorcycle Grand Prix on Phillip Island attracts over 100,000 visitors and contributes strongly to the Island's economy.

The potential of smaller, regional motorcycle events is reflected in the growth of the Island Motorcycle Classic at Phillip Island. Each January, the event, which originally started as a get together for people with a passion for historic bikes, generates \$6.7million to the local economy.

Priority Markets and Segments

The primary market for motorcycle tourism in Victoria will be the intrastate market. Based on anecdotal feedback from stakeholders, the intrastate market has a greater likelihood to participate in motorcycle touring as motorcyclists have a tendency to travel on the spur of the moment and are able to do so more frequently. There are low accessibility issues as they use their own motorcycle and will generally have high discretionary income.

A secondary market is the interstate market, particularly in the linking of major events. The long term goals are to attract more motorcycle riders to ride into Victoria for the Australian Motorcycle Grand Prix and World Superbike Championships, from nearby States (New South Wales and South Australia) and encouraging a greater proportion of them to stay on for a touring holiday.

Issues and Opportunities

Strengths, weaknesses, opportunities and threats (SWOT) analysis:

STRENGTHS	WEAKNESSES
<ul style="list-style-type: none"> > Existing well-established car touring routes. > Victoria hosts Australia's two major international motorcycling sporting events: the Australian Motorcycle Grand Prix and the World Superbikes Championships. > The Grand Prix Circuit at Phillip Island is one of the most scenic racing tracks in the world. > Low cost of participation in motorcycling activities. > High number of clubs and motorcycle events in regional areas. 	<ul style="list-style-type: none"> > Small tourism segment – only 1 per cent of total domestic holidaymakers use motorcycles as a mode of transport. > Small number of motorcycle businesses aiming specifically at visitors. > Limited relationships and networks of motorcycle tourism businesses with mainstream tourism industry. > Low level of motorcycle tourism-specific industry and product development > Where marketing occurs, motorcycle tourism is promoted as a niche industry and not seen as part of the State's overall tourism strengths. > Little research available. > Lack of a united industry voice.
OPPORTUNITIES	THREATS
<ul style="list-style-type: none"> > Take advantage of the inclination not to pre-book and convert motorcycle tourists to spend more when they arrive at a destination. > Position motorcycle touring as a complementary activity to other experiences (wildlife, walks, food and wine). > Leveraging regional motorcycling competitions and events. > Further leveraging of activities that complement major events. > Reinforce road safety messages to motorcyclists. 	<ul style="list-style-type: none"> > Elevated safety risks associated with motorcycling. > Competing brand imaging for Phillip Island (motorsport versus natural attractions/wildlife) > Unless carefully integrated, tourism marketing may be seen to be inconsistent with safety messaging.

Action Area One: Marketing of Motorcycle Tourism

Although motorcycle tourism is a niche segment, there are a number of marketing activities that could be readily implemented to improve the type and accessibility of information sought by motorcyclists.

What will we do in the future?

Actions	Responsibility	Timing
Incorporate motorcycling in touring routes, marketing and public relations activities (where possible): <ul style="list-style-type: none"> > Continue to support international media familiarisations focusing on motorcycle touring. > Encourage motorcycling media to sign up to Tourism Victoria's media newsletters and contribute appropriate content. 	Tourism Victoria Regional Tourism Boards	Ongoing
<ul style="list-style-type: none"> > Enhance the depth and accessibility of information tailored specifically for motorcyclists on visitvictoria.com, including information for tour operators and independent riders. 	Tourism Victoria VicRoads Motorcycling Industry Groups	Ongoing
<ul style="list-style-type: none"> > Encourage Regional Tourism Boards to include motorcycling as part of campaigns directed towards intrastate markets, particularly during shoulder and off-peak seasons. 	Tourism Victoria Regional Tourism Boards	Ongoing

Case Study: Marketing of motorcycle tourism by regional tourism organisations

Ontario, Canada is a prime example of a destination using motorcycle tourism as a priority strength. Several sub regions in the province have actively promoted motorcycle tourism for many years.

One initiative in southern Ontario is the Ontario South Coast Tourism Alliance, a partnership including three local counties. To leverage the region's regular motorcycle event, Friday the 13th, the partnership has produced an integrated motorcycle tourism campaign, Cruise the Coast, to promote their touring routes. Elements include a pocket-size map of touring routes, a dedicated website, a Facebook page, attendance at motorcycle shows and special accommodation deals for riders.

Action Area Two: Product and Industry Development & Motorcyclist Safety

Product development is essential in enhancing the tourism potential of motorcycling while supporting the road safety message.

The disengagement of a large percentage of motorcyclists with motorcycling industry bodies leads to not having a strong, united voice on a number of issues, including tourism. This needs to be addressed if the motorcycle industry is to effectively engage tourism industry bodies such as Victorian Tourism Industry Council (VTIC) and Regional Tourism Boards.

What will we do in the future?

Actions	Responsibility	Timing
Increase the depth of information on the existing Self-Drive section of visitvictoria.com to include rider safety information for motorcyclists, including providing a link to current traffic and road conditions on the VicRoads website.	Tourism Victoria (with support from VicRoads) Motorcycling Australia	2013-14
Encourage Regional Tourism Boards to engage with existing motorcycle tour operators to create awareness of the tourism support available (i.e. VTIC membership, Tourism Excellence workshops, mentoring programs, networking events, etc.)	Tourism Victoria Motorcycling Industry Groups Tourism Industry Groups	Ongoing
Identify and communicate safety issues with high volume motorcycle touring routes.	Tourism Victoria VicRoads	Ongoing

Case Study: Striking a balance between product development and motorcyclist wellbeing

Yarra Ranges Shire Council facilitates an Instructed Motorcycle Rides Program between October and April each year. The day-long program involves participants being split into small groups of riders, each with their own instructor. During the lunch break, riders sit with each other to provide an opportunity to reflect and discuss what they have learnt together. The Program has identified 'motorcycle friendly' businesses to visit for breaks and has included destinations such as Marysville, the Dandenongs and Healesville.

The first of its kind in Victoria, the initiative was developed in response to the Yarra Ranges consistently being identified as the most frequented Local Government Area for motorcycle road trauma (Source: VicRoads Crash Data Statistics via Yarra Ranges Shire Council).

The primary aim of the initiative is to give participants hands-on skills and experience in different road conditions and a secondary aim is to encourage riders to return to the region and to enjoy the touring routes.

Action Area Three: Motorcycle Events

The Australia Motorcycle Grand Prix is an established major event that is a crucial tourism offering for Phillip Island and the State. There is the potential to further leverage visitation across the State through engagement of motorcycle enthusiasts.

What will we do in the future?

Actions	Responsibility	Timing
Major Events Integration		
The Australian Grand Prix Corporation will increase tourism and destination marketing activities in promotion of the Australian Motorcycle Grand Prix. This includes increasing the tourism component on the Australian Motorcycle Grand Prix event webpage.	Tourism Victoria	2013-14
Further integrate the Australia Motorcycle Grand Prix and World Superbikes event listings on visitvictoria.com with accommodation and suggested things to see and do.	Tourism Victoria	2014-15
Maximising Regional Competitive Events		
Encourage Regional Tourism Boards to work closely with regional motorbike events and large group rides to maximise tourism benefits. Events may include both regional motorcycle sporting events, motorcycle business events such as club Annual General Meetings and motorcycle expos and swap meets. This may include initiatives to: <ul style="list-style-type: none"> > Extend participants/spectators length of stay. > Engage non-participants through community events and related activities. > Develop community education campaigns to raise awareness of event impacts. > Include events in general tourism marketing. 	Tourism Victoria Regional Tourism Boards Business Events Victoria	2014-15
Further encourage and integrate regional event listings on visitvictoria.com with accommodation and suggested things to see and do as a resource for participants.	Tourism Victoria Regional Tourism Boards	2014-15

Case Study: Leveraging motorcycle events

The Ulysses Club is a motorcycling club for riders aged over 50. The club has 120 branches across Australia. It is extremely active, organising group and social rides and charity events. The 2012 Ulysses Club Annual General Meeting (AGM) was held in Mildura from 26 March – 1 April 2012, with up to 6,000 members attending over several days.

As part of the AGM, the Mildura branch worked with the Mildura Rural City Council on opportunities to attract members to Mildura, maximise positive economic and social impacts for the event and, most importantly, maximise the riding experience of getting to Mildura.

Before the AGM, members had the opportunity to ride to Victoria, heading to Phillip Island first to complete a lap of the Grand Prix Circuit. Suggested routes and itineraries were identified for riders to then travel to Mildura to enhance their experiences, with a particular emphasis was on routes through flood-affected regions.

In addition, Mildura Rural City Council was involved in road safety awareness campaigns advising local drivers to be aware of the significantly increased number of motorbikes on local roads.

Reporting & Evaluation

Tourism Victoria will implement a monitoring and evaluation program to assess changing environmental conditions and performance that may impact the directions of this strategy. A key element will be the delivery of an Annual Report Card that will provide a summary of the status of key actions and milestones made available to stakeholders.

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