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Tourism on two wheels: Patterns of Motorcycle Leisure in Wales.

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Abstract:

The motorcycle leisure sector has evolved from a rebellious culture of the 1950s to a large mainstream market sector today. Motorcycle touring has grown significantly in recent years, with a shift to larger capacity motorcycles and an increase in the average age of motorcyclists. The demographics of this group has meant that, increasingly, motorcycles are used for leisure purposes rather than commuting. Peripheral locations, with a high proportion of the mountain and scenic roads favoured by motorcyclists, have seen a dramatic influx of these recreationists. Despite this significance there has been little academic work on the subject, or concerted efforts to embrace this market sector by destination marketing organisations. This paper discusses the findings of an investigation into the motorcycling leisure and tourism sector in Wales, UK, examining travel patterns of motorcycle tourists, motivations and preferences of this group and the potential economic impact.

Keywords: *Motorcycling, Destination attributes, Expenditure, Rural tourism.*

Highlights:

This study found that:

- Motorcycling tourists are >45 years of age, male but growing number of female riders.
- Motorcycles were used for leisure and tourism purposes 75% of the time, often travel in groups and carry a pillion.
- 3/4 of motorcycling recreationalists take > ten daytrips a year, average 4.7 overnight trips per year.
- For trip planning use other group members, own knowledge and biker specific websites.
- Destinations need good condition winding roads, scenic stopping points, parking and places to meet other bikers.
- Accommodation needs secure parking, proximity to restaurants, be easy to find and helpful hosts.
- Expenditure is £975.30 per motorcyclist per year, and worth over £70 million to Wales.

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1. Introduction

Every weekend in the summer months in most developed countries, rural areas accessible to major populations regularly echo with the sound of motorcycle engines. Groups of motorcycles follow each other, sinuously winding along country roads, stopping at restaurants and cafes along the way. Increased disposable incomes, motorcycle ownership, media coverage and a reframing of what it means to be a 'biker' have facilitated this phenomenon. However, whilst a significant leisure pastime, motorcycling has received somewhat limited attention in the social sciences, with most attention towards safety, environmental impacts and ethnographic studies of the biker sub-culture (Walker, 2011). Academic work in tourism has neglected the fact that motorcycling is a growing tourism sector targeted at affluent, well-educated and older individuals, and there has been limited work on the patterns of motorcycle tourism.

Existing studies show that the numbers of both motorcyclists and motorcycles have been steadily increasing in recent years. For example, the Motorcycle Industry Association (MCIA) suggests there are 1.2 million active motorcyclists in the UK (around 2.3% of the adult population), although there are up to 3.7 million full motorcycle license holders. Although the UK has one of the lowest rates of motorcycle ownership in Europe, the 1.5 million licensed motorcycles in the UK in 2014 is some 45% higher than in 1999 and has more than doubled the numbers licensed in the mid-1990s (MCIA, 2014). Similarly, there were around 54,000 motorcycles licensed in Wales in 2013, a figure over 43 % higher than in 2001. This can be compared with, for example, a 19 % growth in the number of cars licensed in Wales over the same time period. There has also been a shift to larger capacity motorcycles over past decades and an increase in the average age of motorcyclists, with 50% of all active motorcyclists now aged 40 or over (DfT, 2009). The demographics of this group has meant that, increasingly, motorcycles are used for leisure and tourism purposes rather than commuting.

This study will provide an examination of tourism use of motorcycles, using the case of west Wales, just such a rural area close (within 2 hours) to large population centres. Setting out to interrogate the characteristics of a very visible but under researched sector, the project investigated the socio-economic profile, travel patterns and behaviour, destination and facilities requirements, and economic impact of this group. Whilst there has been some limited high level data reported by governments and industry associations, there has been little work to date examining these characteristics directly with the population of interest, the motorcycle tourist. Following a literature review which examines the shift from motorcycles as a form of transport to primarily a leisure phenomenon in western countries, similar to the shift seen with unpowered bicycles (Han et al, 2017) described in this journal, we examine the attempts by various destinations in Europe and North America to capitalise on this market. Aligning to growth in active forms of tourism, a number of hospitality and event providers have developed to fulfil this need. In many senses motorcycle tourism is just another expression of the increase in experiential forms of tourism in the 21st century, with 'increased participatory involvement' (Bentley et al, 2010:563) that have blurred the line

between leisure and tourism activity. The results from the study present key findings which examine the characteristics of motorcycle tourists, destinations and events and estimates of economic importance. A discussion identifies these key points in relation to existing knowledge and makes theoretical and management recommendations for this important market sector.

2. Theory

2.1 Tourism on two wheels

Motorcycle tourism may be categorised as a subsector of the drive tourism market. Indeed, drive tourism continues to receive some scrutiny (for example Prideaux and Carson, 2011) as part of ‘the recognition that growing numbers of people desire a free and independent travel experience’ (Shih, 2006:1029). Further, this freedom means that drive tourism is influential in the regional dispersal of tourism and is therefore particularly important for rural destinations worldwide, providing an economic alternative to the relative decline in agriculture in developed countries. However, rather paradoxically, drive tourism seems to have fallen out of favour with research and destination organizations as a result of a poor image relating to the current unsustainability of the transport form (Lee and Brahmašreene, 2013). Motor-based tourism in general is unpopular in promotion terms due to concerns with fossil fuel use. However, since most motorcycles use less petrol than the average car, there is potential here to promote motorcycle tourism as a more sustainable form of drive tourism.

However, Pinch and Reamer note that, whilst in investigations of contemporary automobility, the car ‘has provided the starting point for most analysis to date’ (2012:2), there are some distinctive elements to motorcycle tourism. It is important to note that motorcycle tourism differs from drive tourism in respect of a much greater attachment to the vehicle itself, an increased likelihood of travelling in groups, and a greater emphasis on the journey aspects of the experience rather than the destination per se (Walker, 2011, Pinch & Reimer, 2012). Whereas car drive tourists will enjoy the scenic aspects of the tour on the way to tourist sites, motorcyclists have a much higher involvement in the driving experience itself (Pinch & Reimer, 2012). However, motorcyclists may also need to make frequent stops due to limited range, and physical discomfort on the bike. Because of the physical, skills and choice elements involved in motorcycling, Walker (2011) argues it is often more helpful to consider motorcycling as a leisure phenomenon rather than transport because of these characteristics.

Continuing this argument there may be links between two wheeled vacation transport and the adventure tourism sector, noted by Blackman and Haworth (2013). Both of these sectors may share an attraction of perceived risk, although Fuller et al (2008) note that motorcyclists are aware of risk but not actively seeking risk. In common with this, Cater (2006) notes that the commercialisation of adventure tourism has itself led to tourists playing with commodified perceived risk, rather than seeking actual danger. Indeed the adventure activity sector is now more likely to be defined as *‘activities that are focused upon engaging with the natural environment in a physically and mentally challenging manner, where skill*

acquisition and an element of risk management are central to the experience' (Visit Wales, 2011). On road motorcycling's engagement with the natural environment is based largely on the scenic qualities of the landscape through which the participant travels, and a much higher feeling of immersion in that landscape, due to the lack of a rigid structure around them. The engagement with the environment for a motorcyclist is skills based, has a high degree of physical and mental challenge and relies on constant risk assessment (Illum, 2010). In this sense, then, motorcyclists are adventure seekers, and it may be appropriate for marketing organizations to cross target this sector.

2.2 Motorcycle Destinations

Indeed, there have been recent efforts from destinations to develop their motorcycle tourism product (Sykes and Kelly, 2014). Two destinations which have engaged with this market are in Southern Scotland and Northern Ireland, both developing motorcycle tourism with European Union funding under the LEADER scheme. The *Motorcycle Scotland* project aimed to promote Dumfries & Galloway as a motorcycle touring destination, through the development and marketing of a route based website (MotorcycleScotland, 2014). This lists biker friendly businesses in southern Scotland and contains advice on green biking and links to carbon offsetting schemes. The Northern Ireland project identified the importance of road quality, good signage and scenic stopping places for motorcycle tourists. However, many of these initiatives seem to have been based on a 'build it and they will come' approach. Sykes and Kelly (2016) describe the development of a motorcycle tourism strategy in West Virginia, USA, which had limited evaluation of the 'effectiveness of the marketing effort' (16). This paper builds on work by these authors as 'a greater understanding of motorcyclists and their needs may be useful if destinations wish to attract and cater for this group' (Walker 2011:147). In particular, this approach uncovers the economic potential for motorcycle tourism, particularly for rural regions which are the usual hosts for this activity. The UK Motorcycle Industry Association estimated that motorcycle-related tourism expenditure in the UK as a whole is around £569 million, supporting approximately 13,250 tourism jobs (MCIA, 2010). That report suggested that Wales accounts for some 6.7% of this total at £38m or 890 jobs. However, the methodology in the MCIA survey was limited in that it only split total expenditure by a similar ratio of total regional tourism spend. Given that rural Wales has a high proportion of the mountain and country roads favoured by motorcyclists and proximity to the large population centres of the British Midlands, it is suggested that this spend is significantly higher.

Given the specialty nature of motorcyclists, many hospitality providers have found it useful to deliberately target this market. For example, the Ponderosa Cafe Complex targets motorcycle enthusiasts in North Wales, having a 'bikers breakfast' on the menu, and the Ace café on London's North circular road has been an important motorcyclist venue for decades. There is also scope for accommodation providers to target this market. Advice for Biker accommodation has been developed by Visit Scotland for the Bikers Welcome Scheme (motorcyclescotland, 2009). Furthermore, a growing events sector based on motorcycling includes sports events, bike shows and displays, or rallies for motorcycle enthusiasts. The former tend to be larger high profile events, whilst the latter are often organised by clubs and

associations. For example the Isle of Man Tourist Trophy (TT) races have been running since 1907, when the island was chosen due to its seemingly lax laws on racing on public highways compared to mainland Great Britain. The event remains popular and the 2013 event attracted some 40,000 visitors and is estimated to have contributed £26.2 million to the Isle of Man economy (Isle of Man Government, 2013). There are also a large number of UK organisations that arrange motorcycle shows, rallies, rides and other tourism activities including: the British Motorcyclists Federation (BMF); the Motorcycle Action Group (MAG); and many national and regional owners and riders clubs associated with the different motorcycle manufacturers (MCIA, 2010). Many of these events can be sizable, for example the Thundersprint weekend in Northwich in Cheshire, or the European Bike Week, Faaker See, Austria, both of which have attracted over 100,000 visitors annually (Broughton and Walker, 2009). A study undertaken by the North West Development Agency (NWDA) suggested that the 2009 Thundersprint event attracted more than 75% from outside the county, with a total net economic impact for the region estimated to be approximately £4.4 million (HMSO, 2010:116). In the small village of Pocardo, Brittany, France, 20,000 motorcyclists visit the annual pardon of the Madonna of Motorcyclists in August, an event that has been running since 1979 (les Infos de pays de Redon, 2014).

3. Material and Methods

This research is located in a rural region of Wales, where motorcycling tourism is becoming increasingly popular. In order to gain a greater insight into the motorcycle tourism sector in mid-Wales, this study undertook a detailed investigation into the sector in Ceredigion, a predominantly rural county with both mountains and coastal areas popular with motorcycling visitors. Overarching research questions focused on identifying the socio-economic profile; travel patterns and behaviour; destination and facilities requirements; and economic impact of motorcycle tourists to the region. Initial contact was made with the Motorcycle Action Group (MAG) club in Aberystwyth, as they were important gatekeepers for motorcycle tourism activity locally. The researcher attended several monthly meetings and discussed the research questions with members. This assisted in questionnaire design and also facilitated attendance at a summer motorcycle event being organized by the group. A research instrument was designed to answer the above questions, with sections on respondent demographics; riding behaviour; preferences for destination and accommodation attributes; and event attendance. A section was also included on expenditure for the current trip which allowed some estimates of daily expenditure on accommodation, travel and subsistence. Information on preferred roads for riding was also collected as well as current route taken. The latter was chosen over a more complex GPS solution initially considered as it simplified the data collection, and accuracy was deemed to be acceptable. The questionnaire was pilot tested at a screening of a motorcycling film about the Isle of Man races, 'TT3D'. Although these were mainly local residents they had a high degree of commitment to motorcycling and were a useful sample population to undertake the pilot study. Minor refinements were added to the questionnaire from this phase.

Survey sites were selected based on discussions with MAG and having observed the motorcycle tourism market. Sites needed to be those that were popular with motorcycle

visitors and where they were stopping for a reasonable period to answer a questionnaire. These included three key cafes in the region known to be popular motorcycle stopping points: located on the seafront; in the mountains; and close to a tourist waterfall. At all three of these locations questionnaires were left for self-completion, however, response rates for these were generally poor, so researcher delivered questionnaires were later implemented at these sites to improve participation. Although these are more time consuming, the reliability of results and completion of questionnaires is higher. Although some groups included pillion passengers, it was only the driver who was surveyed. Surveys were conducted in the summertime as the activity is more significant during drier and warmer months. Following agreement with MAG, the researcher also attended the Aberystwyth Motorcycle Action Group Show in July, which attracted motorcycle tourists from many parts of the UK. Questionnaires were distributed here including a supplementary section evaluating the event for the local group. In total 156 survey responses were collected and analysed.

Secondary online research was also important to the understanding the context of the study due to the large number of 'bikers guides' and websites discussing routes and tourism advice. A wide range of background discussions were conducted with other organisations such as councils, tourism partnerships, accommodation providers, motorcycling operators, associations and clubs. Whilst this material is not core to the discussion it adds an important explanatory dimension to some of the data presented. Data from the surveys was entered into SPSS 22 (Statistical package for Social Sciences) and a range of descriptive analysis techniques applied. The sample did not allow detailed comparisons, so data is examined at a macro level. The results concentrate on descriptive statistics as the most commonly used statistical techniques in the body of tourism research. Indeed, 'the importance of descriptive statistics rests on their utility as tools for interpreting and analyzing data, especially in studies using multiple items and constructs' (Nunkoo, Smith and Ramkissoon, 2013:16). The paper does not present multivariate analysis, as the focus is on presenting an insight into the sector that blends existing industry reports with the empirical work carried out for the study. These findings are arguably more useful to managers as they are easily interpreted by all stakeholders.

4. Findings

4.1 Motorcycling tourist demographics and behaviour

The lack of interest in the motorcycle tourism sector may be due to a perceived image of rebellious youthful bikers which is actually at odds with their current demographic, as this study found that motorcycle tourists were typically older and male. Over 80% of the sample were over the age of 35, and over half were over 45. The largest age group was 45-54 years of age, illustrating that the motorcycle tourism market is older and likely has more time and more money to spend on this pursuit. Although the majority of motorcycle tourists in the survey were male, a significant proportion were female, making up 17% of the respondents.

As could be expected from the study location, over half of respondents were based in Wales, but it is notable that almost 40% of those answering the survey were from England. Given that survey locations were all in west Wales, this does demonstrate the attraction of

Welsh roads and landscape to English motorcyclists. Although there were no non-British motorcyclists recruited in this particular survey (not deliberately), observation does indicate that the country is popular with two wheel tourists from the continent, particularly from the Netherlands and Germany. Postcode information was collected from survey respondents and this is plotted in figure 1. As can be seen from the map, motorcyclists travel a considerable distance to access the roads of mid Wales. Although there was a significant cluster of local motorcyclists, there are also significant clusters in the West Midlands, the North West, Bristol and the Welsh Valleys. Some motorcyclists came from further afield such as Kent, Essex, the New Forest, Devon and Ireland.

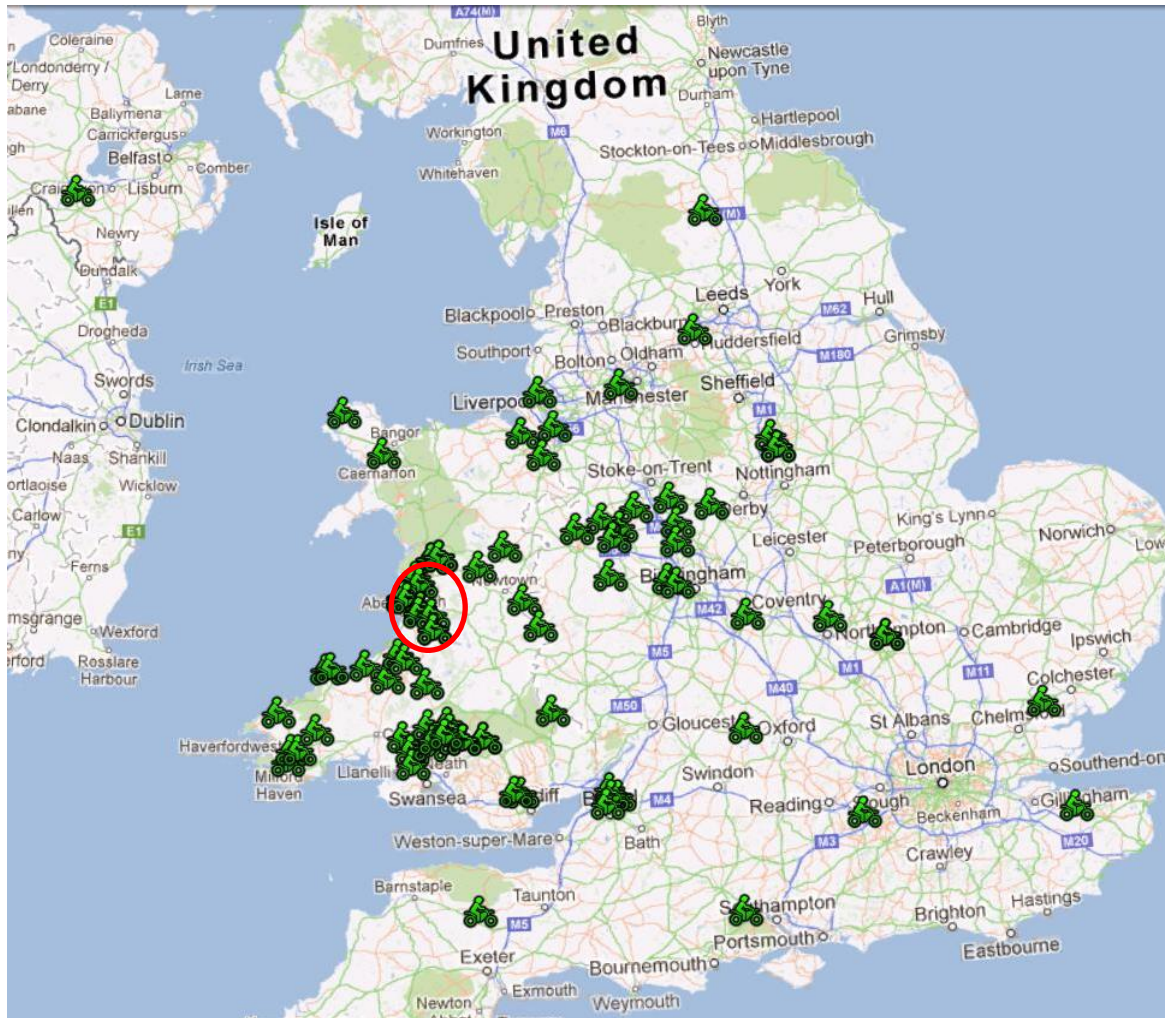
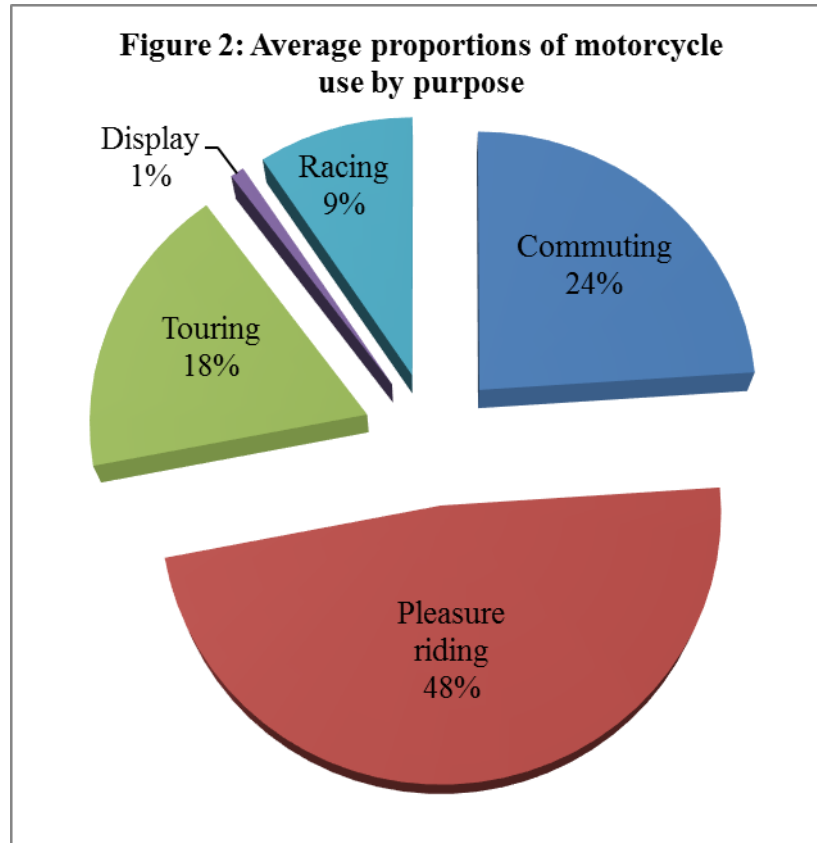


Figure 1: Origin of Motorcycle tourists in survey (survey location circled in red).

The average mileage covered by motorbike owners in the survey was 6452 miles in a year, with 60% covering over 5000 miles or more a year, and nearly a quarter 10,000 miles or more a year. Almost 30% of motorcycle owners in the survey owned more than one motorcycle. The strong leisure and tourism orientation of motorcycles is demonstrated by their percentage use in the current survey, shown in figure 2. When asked the relative proportion of time that these vehicles are used for commuting, pleasure, touring, display and racing, there was a dominance of recreational use, with motorcycles on average only being used just over a quarter of the time for commuting purposes. Of the remaining time,

motorcycles were used in the main for pleasure riding over half of the time, and were used for longer touring about 20% of the time. A small, but significant proportion were motorcycles used for racing purposes at track days or other events (11%).

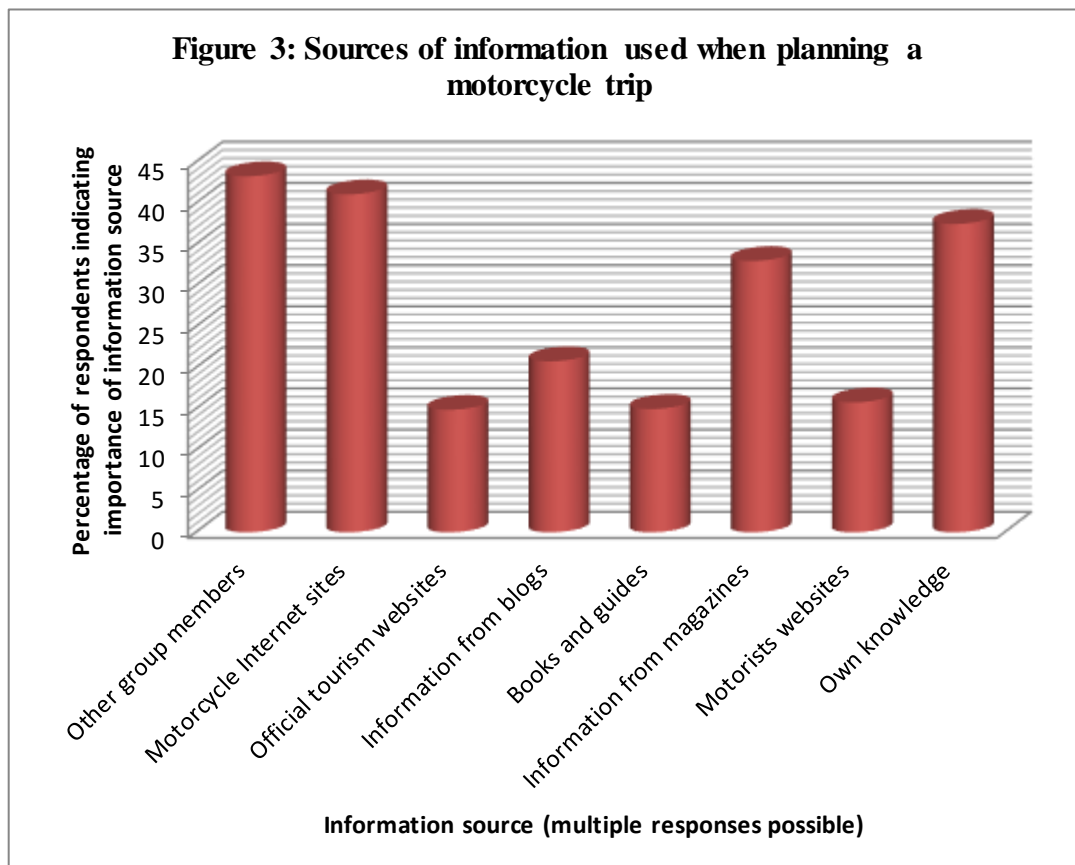


Although a significant number of respondents were travelling alone, the majority of motorcyclists were travelling with other motorbikes. Nearly a quarter of motorbikes were in groups bigger than five. This further emphasises the social aspect to motorcycling and the significant additional volume of spending that may be considered when looking at expenditure. However, it does also highlight a potential issue of motorcyclists travelling in large groups, which may bring them into conflict with other road users. Furthermore, many motorcyclists carry passengers. Although only about half of motorcyclists in this study carried a pillion passenger at all, those who did were on average carrying a passenger approximately half (44 %) of the time.

The current study confirms that motorcycle trips play a central part in the leisure time of owners, with the vast majority of motorcycle owners taking over ten day trips per year. Conversational research with respondents suggested that those who did not do so were owners of classic motorcycles that they would only use on short trips. There was much greater variation in the number of overnight trips, with a fifth of those not making overnight stays at all, but some motorcycle owners taking over ten overnight trips. A conservative estimate calculated from the mean, would therefore suggest that on average, the number of overnight trips taken by motorcycle by owners was 4.7 trips per year. Motorcyclists were well travelled, with almost half (47%) of bikers surveyed having taken an overseas trip by

motorcycle. For reasons of proximity, France, Italy and Spain were the most popular destinations, but some motorcyclists had been to more exotic destinations such as the Arctic Circle and Black Sea on two wheels (see Cater, 2017).

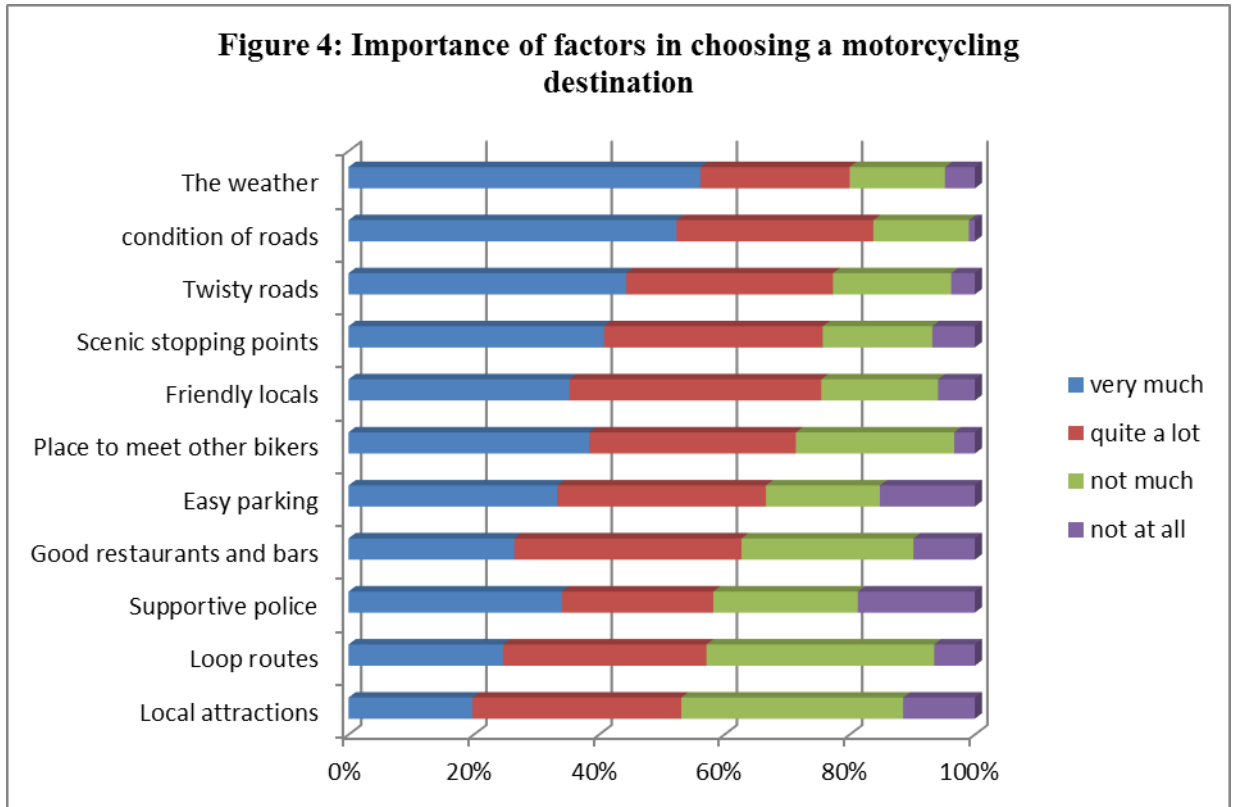
As motorcyclists are a close knit community with orientation towards social factors, many are members of motorcycling organisations. Of the respondents, 41% were members of a motorcycle organisation, either a local club, a national or bike specific club, or the Motorcycle Action Group. These often provide some organisation to this activity, for example planning and facilitating group rides. Motorcyclists use a variety of information sources when planning their trips, illustrated in figure 3. The social nature of motorcycling was an important source with nearly half of respondents using information and recommendations from other group members. Prior knowledge was also an important factor, with a significant proportion of respondents indicating that this was how they planned their trips, highlighting the biker preference for self-sufficiency. The internet was an important information source, but the nature of this search was quite specific. Rather, motorcyclists seemed to trust other motorcyclists, with a preference for websites that were specific to the motorcycling fraternity, and were also significant users of online weblog and discussion boards. There was less use of official tourism websites, which may indicate that specific areas for this segment on DMO sites are not necessary. Motorcyclists also made limited use of general motoring websites, presumably mainly for travel information and route planning. Another important information channel, as already highlighted, is motorcycling magazines, which were used by over a third of bikers to plan their travel. Magazines are therefore an important channel for marketing motorcycle tourism products. Seventy percent of respondents read motorcycling publications, the most popular of these being *Motorcycle News (MCN)*, which was regularly read by 30% of the sample. Other popular magazines were *Bike*, *Ride*, *Fast Bike*, *100% Bike*, *Backstreet Heroes* and *Motorcycle Monthly*.



4.2 Motorcycle Destinations, Facilities and Events

As highlighted above, destinations are recognising the potential significance of motorcycle tourism, although they may not necessarily be targeting this sector appropriately. Motorcyclists answering the survey indicated what factors they deemed important in choosing a destination to visit on their motorcycle (these are displayed in figure 4). The most important factor (which destinations have little control over) was that of the weather, as clearly motorcycling is more enjoyable in dry weather. Similarly, a presence of twisty roads, with sweeping bends that are favoured by motorcyclists, was another desired factor largely out of control of the destination. Whilst Wales may not score on the former, it does have a significant proportion of the latter, which is perhaps one of the major reasons why significant numbers of motorcyclists visit the country.

Factors which may be influenced by destinations, and particularly local councils, are the condition of the roads, which was noted as very or quite important by 84% of respondents; scenic stopping points which were important to 76%; and easy parking which was important to 67%. The latter are particularly important to motorcyclists, as one of the other highly ranked attributes was a place to meet other bikers, with over 70% indicating this would be important in their choice of destination. As mentioned previously, motorcyclists are a close but socially oriented segment, who like to engage in social activity and admire each other's motorbikes. Much of this may also take place in restaurants and bars in the destination, and the presence of good establishments was important to over 60% of motorcyclists. The economic impact on this sector is mentioned later in the paper.

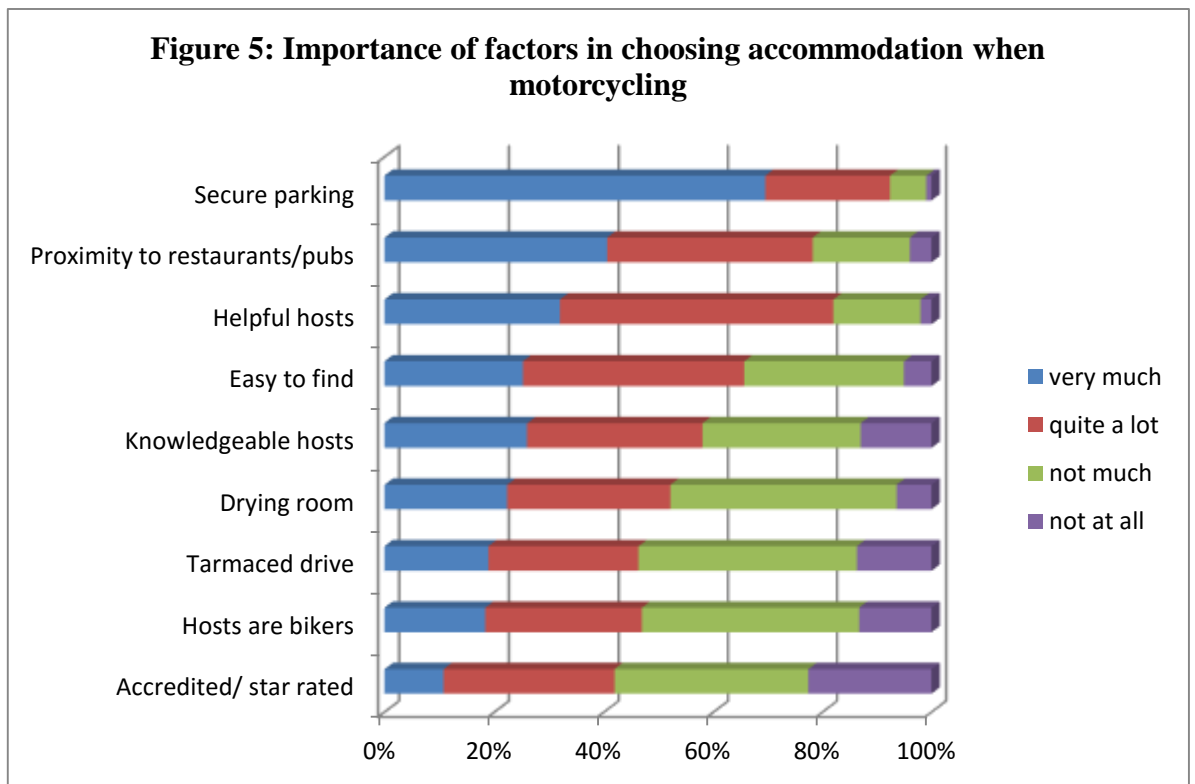


Although a significant proportion did indicate an interest in loop routes which would start and end in the same destination, these were ranked lower in the hierarchy. Similarly, other local attractions were not deemed to be the main reason for travelling to a destination. However, a significant proportion are interested in other activities to do when taking a break from riding, so there is potential for attraction operators and activity providers to consider this in their marketing. Other attributes that were also mentioned by respondents were the presence of garages and main dealers for any maintenance requirements to the vehicle. Whilst the journey was central to the experience, motorcyclists also liked to have a goal, in this case reaching the seaside. As mentioned above it was important that bikers had places where they could stretch their legs and get refreshment and sustenance. However, as motorcycling is the central activity, less emphasis in this survey is given to other activities when visiting destinations. The main additional activity that surveyed motorcyclists were engaged in was refreshment, with three quarters of respondents having a meal (and a drink), and half having a drink only. The high proportion of those wanting food illustrates an important opportunity for hospitality outlets. Lower numbers of respondents engaged in shopping for either souvenirs or groceries. A limited number of respondents, largely those on extended tours, undertook additional tourist activity, seeking visitor centres, visiting museums or other attractions or taking a trip on a local steam train.

In the survey we asked motorcyclists to indicate which attributes of accommodation would be important to them in choosing an establishment (figure 5). The most important attribute by far was secure parking for their motorbike, which 92% felt was very important or

quite important. As mentioned previously, bikers have a high degree of attachment and pride in their vehicle, so the security of this is paramount. Host factors were important, particularly in relation to being helpful to the individual needs of motorcyclists. Knowledge of motorcycling was slightly less important, pointing to the self-sufficiency of motorcyclists, and it was not important to the majority of bikers that hosts were motorcyclists themselves (although a minority would be interested in this). Also of importance was the accommodation being easy to find, as using maps and satellite navigation is difficult on a motorbike. Of high importance was that accommodation was close to restaurants and pubs, as once bikers are finished riding for the day they would prefer to be able to walk to any eating establishments. A drying room and a hard surface drive were not seen as essential, but about half of respondents would be interested in these. Accreditation and star rating of establishments were not deemed as important to this particular segment.

Some other accommodation attributes were also mentioned by respondents. There was a preference for clean establishments and those that had good showers and bath facilities, due to the often cold, dirty and tiring experience of motorcycling. A degree of interest in camping facilities was indicated and bikers did indicate a preference for good value accommodation. However a small number of respondents did mention a preference for high end accommodation, so there may be a market niche in high standard motorcycle oriented products, which reflects the contemporary demographic of older and wealthier motorcyclists. Overall bikers were keen to stress that they would often use establishments recommended by other bikers, showing the close knit nature of this community. The most important was that accommodation was seen to be ‘biker friendly’ and would not portray a feeling of being unwelcoming to the specific needs of these tourists.



The centrality of *motorcycling* to the motorcycle tourism sector is demonstrated in the popularity of motorcycle events, which do attract motorcyclists to visit destinations, and offer bikers the opportunity to meet like-minded individuals. Over three quarters (76%) of those surveyed had been to some form of motorcycle event in the past year. These included motorcycle races, motorcycle rallies and club events, classic or custom motorcycle shows and new motorcycle shows such as that held annually at the National Exhibition Centre. The importance of the Isle of Man TT as a ‘must do’ on the motorcycling calendar is shown by the fact that some 16% of respondents in the survey had visited the race.

4.3 Motorcycling tourism expenditure

Expenditure patterns of motorcycle tourists further emphasise the importance of motorcycling when examining the holistic experience. Motorcyclists in the survey were asked to detail their current and planned expenditure on their trip. Those in the current survey were not particularly high spenders when it came to accommodation, as average expenditure on accommodation (for those travelling overnight in the survey) was £48 per night. The average expenditure on food and drinks per day was £21. This was predominantly on snacks and meals in cafes and pubs along the route at stopping points or at days end. The inability to carry much food and drink means that motorcyclists spend more in the local economy than those taking other forms of transport. As motorcycling is unusual in that the tourism activity is the mode of travel, average expenditure on travel is relatively high, despite the slightly better fuel consumption of two wheeled transport. Motorcyclists spent an average per day of £30 on travel, primarily on petrol for the motorcycle. Although some of this spend would take place at point of origin, limited capacity of fuel tanks means that again the majority of this expenditure would also take place within host communities at local service stations. In this particular survey there was limited expenditure on other items, but there was some mention of souvenirs and other activity expenditure.

Motorcycle tourists are therefore spending some £51 per day excluding accommodation and £99 per day including accommodation when they travel. Using an estimate from above that the average number of day trips is 10 and the average number of overnight trips is 4.7, a conservative estimate of motorcycle related tourism expenditure is £975.30 per motorcyclist per year. It is difficult to estimate the exact number of motorcyclists who do visit Wales for tourism purposes. Using the results of the survey we can assume that approximately 76% of motorcycles in Wales are used for tourism and leisure purposes, which is approximately 42,000 vehicles. Given that a further 40% of visitors to Wales were from England (these numbers may be much higher in other regions) we can estimate that there would be at least 72,000 motorcycle owners active in Wales in any one year. Taking the estimate of annual expenditure, we can assume that motorcycle tourism is worth at least £70 million to the Welsh economy per year. Although this is an estimate, knowledge of this sector would suggest that this is a lower limit, and total value to the economy is much higher still, particularly as no multipliers have been included in this calculation.

5. Discussion

5.1 Theoretical implications

It is clear from the results of this study that our understanding of the motorcycle tourist may be outdated, for their popular image may actually be at odds with their current older demographic, highlighted by several authors as ‘born again’ bikers (Pinch & Reimer, 2012, Walker, 2011). Furthermore, although the activity is still dominated by male participants, the most significant growth in motorcyclists has been in female riders, which formed a significant proportion of this study. There are now over half a million female motorbike license holders in the UK (MCIA, 2008). Although research by the MCIA suggested that only about half of all motorcyclists use their motorcycles for any form of tourism activity, with a third using their motorcycles for day trips, 22% using motorcycles for short (weekend) breaks, and 10% using their motorcycles to take longer holidays (MCIA, 2010), this study found a much higher participation rate in leisure and tourism use of 76%. The greater tourism orientation of this survey may be biased as the research was conducted in a tourism location, so one would expect a higher leisure orientation for these users. Of those who own a motorcycle, the vast majority take over ten day trips per year, a finding in line with results in other countries (Sykes and Kelly, 2014). Previous research had suggested that the average motorcyclist in the UK spends at least 4.5 days per annum taking overnight motorcycling trips, equating to 6.7 million tourism days in total (MCIA, 2010), and this study found a similar average of 4.7 days per annum.

Community aspects of motorcycle tourism are strong, demonstrated by high levels of membership of motorcycle groups and use of these as an information source shown in figure 3. As identified by Walker, clubs are an important aspect of motorcycle participation, with ‘riders having a sense of belonging to a community’ (2011:152). It is also important that the local community feels welcoming to motorcyclists (shown in figure 4), although it is recognised that this must be a reciprocal process with equivalent respect of local residents and other user groups by bikers. Sykes and Kelly suggest that for the majority of motorcycling tourists ‘there is respect for people and place, mutual reciprocity, and that relationship evolves to place, people, loyalty and repeat visitation, based on memories of past interactions with people at that place’ (2014:96).

Motorcycle tourism is of clear economic importance to rural areas, such as those in this study. Whilst several authors (Broughton and Walker, 2009, Walker, 2011) have pointed to the affluent nature of the contemporary biker, those in the current survey were not particularly high spenders when it came to accommodation, although the MCIA estimated that average annual expenditure on motorcycle-related accommodation would be £270, Broughton and Walker (2009) suggested that motorcyclists spend £430 per year on motorcycle related accommodation and had an annual tourism related expenditure of £798, which is broadly comparable to the figures in our survey. Interestingly Broughton and Walker estimated a total of £4263 pa on all biking activities, but this included significant expenditure on the motorcycle itself, and elements such as insurance, maintenance and servicing. This study estimates the economic contribution of motorcycle tourism to be at least £70 million to

the Welsh economy, twice the estimates provided by previous industry studies. Whilst this is less than 2% of the current estimates of domestic tourism as a whole, being worth approximately £4.5 billion to the country (Welsh Government, 2013), this calculation is without multipliers. Furthermore, the fact that this expenditure is dispersed is highly important, for it is likely to benefit peripheral areas more significantly than traditional tourism expenditure.

5.2 Managerial implications

This study demonstrates that there are clear opportunities for tourism destinations to develop their motorcycle tourism product. Some of the attraction factors are beyond the control of the destination, for example weather, or the presence of roads with sweeping bends that are favoured by motorcyclists. However, it is worth noting that destinations that have these attributes do possess a competitive advantage in these areas (Ritchie and Crouch, 2003). Furthermore, as Denstadli and Jacobsen highlight, it is 'clear that roadside facilities play a crucial role in achieving overall satisfaction among motor tourists' (2011:787), and this is particularly true for motorcyclists, who expressed a preference for safe places to stop. Good condition roads were also an important factor in responses reported by Sykes and Kelly (2016). Although there does not seem to be high levels of interest in additional tourism activity, this may be to the advantage of rural regions, which do not need to provide significant additional investment in infrastructure in order to appeal to this market (Sykes and Kelly, 2016). The minor investment that this sector requires may be much lower than that required by other motor based tourism, such as RVs. There is, however, significant opportunity for destinations to develop motorcycle tourism events, with high repeat visitation. For example the Isle of Man TT has an incredibly high loyalty, with 73% having visited before and 65% of visitors claiming they come every year to the island races (Isle of Man Government, 2013).

In relation to the host-guest relationship in the theoretical discussion above, destinations should develop a good relationship with the police who are supportive of safe motorcycling activity. Indeed, destinations need to be wary of creating a negative biker image. There are many historical reports of north Wales suffering from a bad image in terms of unreasonable policing, and bikers feeling unfairly targeted. The west Wales town of Aberystwyth has had a particular on-going issue of parking provision for motorcyclists on the seafront promenade. The seafront is a very popular destination for motorcyclists, as it has catering facilities and a large open area where many bikers can congregate. However, this has brought conflict with other users, prompting the council to regulate parking provision. Some initial reports indicated that motorcyclist visitors were either put off from visiting the town, or are not complying with the new regulations (Cambrian News, 2011).

There are some minor limitations to this study, As the study was carried out in a largely tourism area, the study may overstate the importance of tourist use, however, given that this is the population of primary interest, this is perhaps a strength rather than a weakness to the study. The relatively small sample size did not allow detailed breakdown of the sample into what is unlikely to be a completely homogenous group. However, the study is largely

exploratory in nature given the lack of work in this area, a concern noted in other studies of active tourism (Bentley et al, 2010). Although the data presented here is mostly descriptive we hope that this study prompts further and larger studies allowing investigation of sub groups in the motorcycle tourism sector.

6. Conclusion

This paper has highlighted the significance of the motorcycle tourism sector, both in behaviour and implications for destinations. The majority of motorcycling tourists are over 45 years of age, illustrating that the motorcycle tourism market is older and likely has more time and more money to spend on this pursuit. Whilst many are male there are a growing number of female riders and they often travel in groups and frequently carry a pillion passenger. Leisure and tourism is a major use of two-wheeled transport in developed countries, with three quarters of the time the motorcycle is on the road being for recreation in this survey. Over three quarters of motorcycling recreationalists take over ten daytrips a year, and on average 4.7 overnight trips by motorcycle per year, sometimes overseas. Indeed, the importance of motorcycle tourism as a driver of tourism flows is significant, as it is suggested that around 100,000 independent riders from the UK take tourism-related motorcycling trips abroad each year, compared to 23,000 international riders visiting the UK (MCIA, 2010). Greater attention to these forms of mobility is warranted, for example, the significant number of motorcyclists taking extended overland journeys, for example to the North Cape of Norway (Cater, 2017).

As identified by previous authors, motorcyclists identify strongly with the activity, with high levels of membership of motorcycle organisations, and regular use of motorcycling publications. Tourism is increasingly used as a form of identity expression (Cater and Poguntke, 2017), and motorcycling is no exception. When planning a trip they use other group members, their own knowledge and biker specific websites. They are lower users of generalist motoring or tourism websites. This is perhaps emblematic of the fragmented nature of the information search process in contemporary tourism noted by Choi et al. (2007). What is evident, however, is the central nature of motorcycling itself in the motorcycle tourism experience. Walker (2011) highlights the expressive nature of motorcycle journeys and their importance in destination selection. Thus when selecting a destination, winding roads in good condition were important, as well as scenic stopping points, easy parking and a place to meet other bikers. Motorcycle tourists in this study were frequent users of catering facilities, but less of tourism attractions. When selecting accommodation, secure parking, proximity to restaurants/pubs, being easy to find and helpful hosts were deemed the most important. Furthermore there is a very significant motorcycle event sector, with over three quarters of those surveyed having been to some form of motorcycle event in the past year. As Walker notes 'the amount that motorcyclists spend in the pursuit of their riding activities and the way this money is spent can bring valuable insights into their potential value as a leisure and tourism market segment' (2011:149). Average daily expenditure in this study on meals was £21, travel £30 and accommodation was £48 per night. A conservative estimate of motorcycle related tourism expenditure derived from this study is £975.30 per motorcyclist

per year. Direct expenditure on motorcycle tourism (without multipliers) is estimated to be worth a minimum of £70 million to the Welsh economy per year.

However, there does need to be attention directed towards the environmental and social impacts of motorcycle tourism. The emergence of viable electric motorcycles in recent years may alleviate some of the former impacts. Nevertheless, it is clear that greater targeting and servicing of this tourism sector is required, as well as partnership with road safety organisations to ensure education of all road users. The chance of a motorcycle rider being killed or seriously injured, per kilometre travelled, is still around 54 times greater than for a car driver (WAG, 2009). Sykes and Kelly (2016) suggest the creation of regional tourism organisations focused specifically on the motorcycle sector for the benefit of rural stakeholders. In a climate of reduced regional representation for the tourism industry, this may be difficult in Wales (government funded Regional Tourism Partnerships in Wales were dissolved in 2014). However, one advantage that this sector may have which is illustrated in this study is its close-knit nature, with RTOs potentially ‘leveraging the motorcycle touring community itself to promote the touring route’ (Sykes and Kelly 2016:14). Not only can destinations use these networks to develop motorcycle tourism, they can also use them to ensure that there is adequate stakeholder communication and a reduction of negative impacts. This is particularly the case in terms of safety of motorcyclists and other road users, and the development of the collaborative *Bikesafe* (www.bikesafe.co.uk) educational program in the UK is a positive initiative here. Such initiatives will ensure the social and environmental sustainability of this tourism activity as it continues to grow.

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