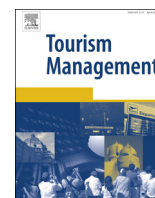


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Tourism on two wheels: Patterns of motorcycle leisure in Wales



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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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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.

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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

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has more than doubled the numbers licensed in the mid-1990s (MCIA, 2015). 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, Meng, & Kim, 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, Cater, & Page, 2010, p. 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, p. 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 organisations as a result of a poor image relating to the current unsustainability of the transport form (Lee & Brahmarsene, 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, 2011). In this sense, then, motorcyclists are adventure seekers, and it may be appropriate for marketing organisations to cross target this sector.

2.2. *Motorcycle destinations*

Indeed, there have been recent efforts from destinations to develop their motorcycle tourism product (Sykes & 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*, 2009). 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 (*Northern Ireland Tourist Board*, 2006). 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,

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