



# Cycling and Mountain Biking Product Overview

BUILDING TOURISM WITH INSIGHT

## CYCLING AND MOUNTAIN BIKING

April 2009

This profile summarizes information on the cycling and mountain biking sector in British Columbia and contains a demographic and travel profile of travellers who participated in cycling and mountain biking activities while on a pleasure trip. Also included, is information on other outdoor and cultural activities participated in by cycling and mountain biking travellers, a discussion of recent trends within the sector, and information related to the economic impact of the cycling and mountain biking sector in general.

Information in this report has been compiled from several sources, including the 2006 Travel Activities and Motivations Study, a summary of US data from the Outdoor Industry Foundation, information from an economic impact assessment of the 2003 UCI Road World Cycling Championships from the Canadian Sport Tourism Alliance, and data gathered through a 2007 economic impact study of mountain biking in the Sea to Sky corridor conducted by the Western Canada Mountain Biking Tourism Association.

## Demographic Profile

### DEMOGRAPHIC PROFILE OF CYCLING AND MOUNTAIN BIKING PLEASURE TRAVELLERS

Pleasure travellers participating in the Travel Activities and Motivations Survey (TAMS) who had been to British Columbia in the past two years were asked to indicate if they had participated in a cycling activity<sup>1</sup> while on a trip (in the past two years). Those who had participated in these activities were further asked if cycling activities had been a primary motivating factor for any of their trips (see Table 1).

- More males than females participated in cycling activities; this difference was greater for travellers who were motivated by cycling. The gender split is also more pronounced for visitors from the US than from Canada (for instance, 63% of participating travellers from the US are male, compared to 55% from Canada).
- Canadian cycling travellers were younger overall than US cycling travellers. The largest group of Canadians were aged 18-34 (40%), while the largest group of Americans were aged 45-54 (30%) for participating travellers.
- A larger proportion of US cycling travellers were 65 years of age or older as compared to Canadian cycling travellers (7% participated and 10% motivated, compared to 3% and 3% respectively).
- The majority of Canadian and US cycling travellers had household incomes over \$60,000 (64% and 71% participated, respectively and 63% and 69% motivated, respectively).
- Education levels for Canadian and US cycling travellers were similar, with most travellers having completed post-secondary education (66% and 69% participated, respectively and 64% and 65% motivated, respectively).

<sup>1</sup> Throughout this report, cycling and mountain biking includes same day excursions, mountain biking, and overnight tour trips. Unless otherwise noted, information in this report is from the 2006 Travel Activities and Motivations Survey.

**Table 1: Demographic profile of cycling travellers from Canada and the US**

Demographics of Cycling Travellers from Canada and the US who have been to BC	Canada		US	
	Participate	Motivate	Participate	Motivate
Adults 18+	976,438	273,114	980,443	356,949
Unweighted Numbers	1,188	335	311	114
Gender				
Male	54.5%	62.4%	63.3%	64.3%
Female	45.5%	37.6%	36.7%	35.7%
Age				
18-34	40.1%	37.5%	26.8%	30.1%
35-44	22.6%	19.3%	18.1%	14.0%
45-54	22.1%	23.3%	30.2%	28.4%
55-64	12.2%	17.4%	17.8%	18.0%
65+	3.1%	2.5%	7.0%	9.5%
Household Income				
Under \$40,000	12.4%	14.0%	9.2%	12.1%
\$40,000-\$59,999	11.8%	11.4%	8.8%	9.9%
\$60,000-\$99,999	27.5%	25.2%	25.0%	26.9%
\$100,000 or more	36.5%	38.1%	45.7%	42.4%
Not stated	11.7%	11.3%	11.2%	8.7%
Education				
Less than Secondary	2.4%	1.8%	1.5%	2.6%
Completed Secondary	17.6%	15.1%	4.3%	2.5%
Some Post Secondary	13.4%	18.6%	24.3%	28.0%
Completed Post Secondary	66.0%	64.0%	68.7%	64.6%
Other	n/a	n/a	0.3%	0.9%
Not stated	0.5%	0.5%	0.8%	1.3%

Source: Travel Activities and Motivations Study 2006; special analysis by Tourism British Columbia. Table includes those who have visited British Columbia (at least once) in the past two years on an out-of-town pleasure or vacation trip of one or more nights.

Note: Cells with values displayed in red are based on small sample sizes (i.e. less than 50) and should be interpreted with caution.

### DEMOGRAPHICS BY SPECIFIC CYCLING ACTIVITY – CANADIAN PLEASURE TRAVELLERS WHO HAVE TRAVELLED TO BRITISH COLUMBIA

- Gender differences were evident among Canadian travellers motivated by cycling. While more males than females were motivated by each specific activity, the difference was greatest for those motivated by mountain biking, where 75% of Canadian travellers were male (see Table 2).
- Similarly, a greater proportion of travellers motivated by mountain biking were between 18 and 34 years of age compared to other cycling activities (43% compared to 37% for overnight tour trip travellers and 32% for same day excursion travellers). No seniors were motivated by mountain biking, compared to 4% of Canadian travellers motivated by overnight tour trips and 3% motivated by same day excursions.
- The majority of Canadian travellers motivated by cycling activities had household incomes over \$60,000; this proportion was largest for those motivated by mountain biking (69% compared to 63% for overnight tour trip travellers and 64% for same day excursion travellers).
- Mountain biking travellers were most likely to be well educated, with 64% having completed post-secondary education (compared to 60% for both overnight tour trip and same day excursion travellers).

**Table 2: Demographics by specific cycling activity for travellers from Canada**

Demographics of Canadian Travellers who have been to BC by Cycling Type	All Canadian Travellers who visited BC	Type of Cycling Activity (Motivated)		
		Same Day Excursion	Mountain Biking	Overnight Tour Trip
Total	5,651,177	169,881	103,791	91,887
Unweighted Numbers	7,315	216	113	101
<b>Gender</b>				
Male	49.9%	58.4%	74.5%	61.6%
Female	50.1%	41.6%	25.5%	38.4%
<b>Age</b>				
18-34	31.4%	32.1%	42.8%	36.7%
35-44	18.8%	20.5%	18.7%	13.7%
45-54	21.3%	28.3%	24.0%	29.9%
55-64	14.9%	15.8%	14.5%	16.0%
65+	13.5%	3.3%	0.0%	3.6%
<b>Household Income</b>				
Under \$40,000	17.6%	7.9%	21.5%	8.7%
\$40,000-\$59,999	13.9%	14.0%	6.0%	10.5%
\$60,000-\$99,999	27.4%	31.9%	22.1%	14.6%
\$100,000 or more	29.1%	32.2%	46.6%	47.9%
Not stated	12.0%	14.0%	3.8%	18.3%
<b>Education</b>				
Less than Secondary	7.2%	1.8%	1.1%	3.2%
Completed Secondary	24.9%	13.2%	15.4%	11.0%
Some Post Secondary	12.0%	24.2%	19.2%	26.4%
Completed Post Secondary	55.1%	60.0%	64.2%	59.5%
Not stated	0.7%	0.8%	0.0%	0.0%

Source: Travel Activities and Motivations Study 2006; special analysis by Tourism British Columbia. Table includes those who have visited British Columbia (at least once) in the past two years on an out-of-town pleasure or vacation trip of one or more nights.

Note: Cells with values displayed in red are based on small sample sizes (i.e. less than 50) and should be interpreted with caution.

### DEMOGRAPHICS BY SPECIFIC CYCLING ACTIVITY – AMERICAN PLEASURE TRAVELLERS WHO HAVE TRAVELLED TO BRITISH COLUMBIA

- US travellers who were motivated by cycling were more likely to be male; the proportion of males compare to females was greatest for those motivated by overnight tour trips (82% compared to 74% of mountain biking travellers and 61% of same day excursion travellers, see Table 3).
- The greatest proportion of overnight tour trip travellers (30%) and mountain biking travellers (48%) were between the ages of 18 and 34; for same day excursion travellers, however, the greatest proportion of travellers (29%) were between the ages of 45 and 54. More seniors were motivated by same day excursions (13%) or overnight tour trips (11%) than by mountain biking (5%).
- The majority of US travellers who were motivated by cycling had household incomes over \$60,000. This proportion was greatest for same day excursion travellers (76% compared to 73% for overnight tour trip travellers and 61% for mountain biking travellers).
- The majority of US travellers who were motivated by cycling had completed post-secondary education. Again, however, this proportion was higher for same day excursion travellers (70% compared to 65% for overnight tour trip travellers and 59% for mountain biking travellers).

**Table 3: Demographics by specific cycling activity for travellers from the US**

Demographics of US Travellers who have been to BC by Cycling Type	All US Travellers who Visited BC	Type of Cycling Activity (Motivated)		
		Same Day Excursion	Mountain Biking	Overnight Tour Trip
Total	7,025,878	227,814	154,179	77,012
Unweighted Numbers	2,196	70	51	27
<b>Gender</b>				
Male	52.2%	61.2%	73.8%	82.0%
Female	47.8%	38.8%	26.2%	18.0%
<b>Age</b>				
18-34	21.5%	24.9%	48.3%	30.4%
35-44	13.6%	14.5%	16.3%	16.3%
45-54	21.9%	29.1%	16.8%	21.5%
55-64	19.7%	18.2%	14.0%	21.3%
65 +	23.3%	13.3%	4.6%	10.6%
<b>Income</b>				
Under \$40,000	13.0%	10.0%	14.0%	13.0%
\$40,000-\$59,999	13.6%	13.4%	6.4%	13.9%
\$60,000-\$99,999	27.4%	26.9%	27.9%	24.0%
\$100,000 or more	34.5%	48.8%	32.7%	49.1%
Don't Know/Not Stated	11.6%	0.8%	18.9%	0.0%
<b>Education</b>				
Less than Secondary	1.6%	2.7%	5.3%	0.0%
Completed Secondary	7.9%	0.8%	4.6%	0.0%
Some post Secondary	23.4%	26.3%	28.0%	31.2%
Completed Post Secondary	64.7%	70.1%	59.0%	64.8%
Other	0.5%	0.0%	2.1%	0.0%

Source: Travel Activities and Motivations Study 2006; special analysis by Tourism British Columbia. Table includes those who have visited British Columbia (at least once) in the past two years on an out-of-town pleasure or vacation trip of one or more nights.

Note: Cells with values displayed in red are based on small sample sizes (i.e. less than 50) and should be interpreted with caution.

## Travel Profile

### TRAVEL BY CANADIAN AND US CYCLING PLEASURE TRAVELLERS

- Of the estimated 5.6 million Canadian travellers who travelled to British Columbia in the past two years, just under 1 million (17%) participated in a cycling activity while travelling. Over 270,000 (5%) stated that cycling was their primary motivation for at least one overnight trip (see Table 4).
- US travellers were slightly less likely to include cycling activities while travelling. Of the estimated 7 million US travellers who travelled to British Columbia in the past two years, just under 1 million (14%) participated in a cycling activity while travelling; over 350,000 (5%) stated that cycling was their primary motivation for at least one overnight trip.
- The majority of Canadian and US travellers had taken five or more out-of-town pleasure trips in the past two years. Both those who participated in and those who were motivated by cycling were more likely to have taken five or more out-of-town pleasure trips compared to all travellers to British Columbia. Overall, nearly three quarters of Canadian and US cycling travellers could be considered frequent travellers.
- British Columbia was seen by the majority of travellers from both the US and Canada as a very appealing destination, with the majority rating the appeal of BC 8 or better on a 10-point scale. All Canadian travellers were more likely (88%) to rate the appeal of BC 8 or higher compared to all US travellers (76%), and ratings among cycling travellers were even higher than overall travellers from each country. Among participating cycling travellers from Canada, 92% provided a rating above 8 out of 10, while 90% of Canadian travellers

who were motivated by cycling activities provided a high rating. Among US cycling travellers, 85% and 83% of participating and motivated travellers, respectively, provided high destination appeal ratings for BC.

- Canadian and US cycling travellers (both participated and motivated) were more likely to travel in either summer or winter season compared to the overall traveller. However, a larger proportion reported travelling in the summer (97% participated and motivated among Canadian cycling travellers and 94% participated and 96% motivated among US cycling travellers).

**Table 4: Travel Profile of Visitors from Canada and the US (Participated and Motivated)**

	Canada			US		
	All Travellers who Visited BC	Participate	Motivate	All Travellers who Visited BC	Participate	Motivate
Total	5,651,177	976,438	273,114	7,025,878	980,443	356,949
Unweighted Numbers	7,315	1,188	335	2,196	311	114
Total number of out-of-town pleasure trips taken in past two years						
One	6.9%	5.9%	3.7%	3.3%	0.5%	0.0%
Two	11.8%	6.5%	9.6%	8.7%	3.9%	5.4%
Three	11.9%	8.0%	8.5%	9.5%	8.7%	9.3%
Four	11.5%	8.5%	7.1%	11.7%	9.3%	12.2%
Five Or More	57.9%	71.2%	71.1%	65.4%	77.2%	72.7%
Not Stated	0.0%	0.0%	0.0%	1.3%	0.4%	0.4%
Appeal Of British Columbia - Rated on a scale of 1 to 10						
8 to 10	87.5%	91.9%	90.2%	75.7%	84.6%	82.5%
4 to 7	9.6%	6.8%	7.2%	18.2%	11.1%	11.6%
1 to 3	1.1%	0.8%	2.3%	2.6%	3.0%	4.4%
Don't Know	0.6%	0.0%	0.0%	2.2%	0.2%	0.0%
Not Stated	1.2%	0.4%	0.4%	1.2%	1.1%	1.5%
Season travelled						
Summer	89.9%	97.2%	96.5%	87.7%	94.4%	95.8%
Winter	71.0%	80.8%	74.7%	77.4%	87.8%	87.9%

Source: Travel Activities and Motivations Study 2006; special analysis by Tourism British Columbia. Table includes those who have visited British Columbia (at least once) in the past two years on an out-of-town pleasure or vacation trip of one or more nights.

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## OTHER DESTINATIONS VISITED

- Among participating Canadian cycling travellers who visited British Columbia, other popular destinations included Alberta (66% visited) and the US (69% visited) for overnight travel destinations. Similar destinations were also popular among motivated Canadian cycling travellers who visited BC; however, they were more likely to have travelled to Alberta with 72% including an overnight trip to this location.
- Of the 10.8 million US travellers who participated in cycling, 9% had made at least one trip to British Columbia in the past two years. The percentage of motivated US cycling travellers who had visited BC was slightly higher, at 12%.

## OTHER ACTIVITIES (OUTDOOR AND CULTURAL) PARTICIPATED IN

- For the most part, other outdoor and cultural activities participated in were similar for British Columbian, Canadian and US cycling travellers (see Table 5).
- For both British Columbian and Canadian travellers, swimming in lakes was the next most popular other activity, while for US travellers strolling a city to see buildings ranked second in popularity for participating travellers, while visiting a national or provincial nature park ranked second for US motivated travellers.

- Sunbathing or sitting on a beach was also popular, with roughly two thirds of British Columbian and Canadian participating cycling travellers and just over half of US cycling travellers participating. Sunbathing rates were slightly lower for motivated cycling travellers from BC and Canada.
- US cycling travellers were more likely to report visiting historic sites or buildings as compared to Canadian or British Columbian travellers (61% and 58% of participating and motivated US travellers, respectively, as compared to 47% and 40% for BC travellers and 50% for both participating and motivated Canadian travellers).

**Table 5: Other outdoor and cultural activities participated in by cycling travellers**

Activities	BC		Canada		US	
	Participate	Motivate	Participate	Motivate	Participate	Motivate
Swimming In Lakes	67.9%	69.2%	67.6%	63.9%	50.6%	54.9%
Sunbathing/Sitting On A Beach	68.1%	61.2%	65.8%	59.5%	53.8%	59.8%
Stroll A City To See Buildings	63.1%	54.0%	63.1%	58.6%	68.3%	60.4%
Nature Park- National/Provincial	58.2%	40.9%	57.7%	50.3%	63.3%	61.7%
Hiking - Same Day Excursion	62.4%	47.8%	57.1%	48.3%	65.7%	61.3%
Historic Site/Buildings	47.2%	39.9%	49.9%	49.7%	60.7%	57.9%
Swimming In Oceans	47.1%	47.2%	49.2%	51.6%	52.4%	55.6%
Well Known Natural Wonders	43.6%	41.1%	44.8%	43.7%	62.1%	61.1%
Museum - History/Heritage	49.9%	36.4%	42.9%	36.5%	48.3%	43.1%
Other Historic Sites/Buildings	40.8%	25.0%	38.9%	34.4%	56.4%	55.2%
Fitness - Jog/Exercise Outdoors	44.4%	35.7%	38.0%	29.1%	41.0%	36.3%
Skiing - Downhill	30.3%	40.0%	38.0%	41.4%	31.8%	28.3%
Farmers' Markets/ Country Fair	37.2%	25.0%	35.3%	24.5%	53.0%	50.7%

Source: Travel Activities and Motivations Study 2006; special analysis by Tourism British Columbia. Table includes those who have visited British Columbia (at least once) in the past two years on an out-of-town pleasure or vacation trip of one of more nights.

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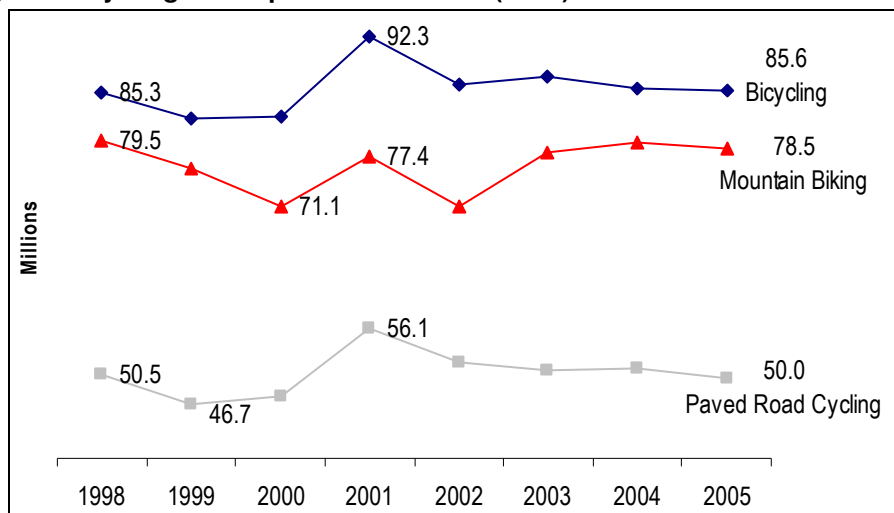
## Trends within the Cycling Tourism Sector<sup>2</sup>

### RECREATIONAL CYCLING

- In the United States, over 60 million people (27% of the population) participated in cycling, including bicycling, mountain biking, and paved road cycling.
- The number of people participating and the average number of outings has declined; for instance, in 2001, 59% of cyclists reported taking 11 or more cycling trips in a one year period, while in 2005 this proportion had decreased to 50%. Diverse factors, including colder weather throughout the year and a change in fitness trends from outdoor to indoor fitness activities may be affecting cycling.
- Regional differences in cycling trends exist, with more cyclists tending to come from Western areas of the US (44%, compared to 40% in the northern central states, 37% in the north-eastern states, and 33% in the southern central states).

<sup>2</sup> 2005 Outdoor Recreation Participation Study, Outdoor Industry Foundation, available at <http://www.outdoorfoundation.org/pdf/ResearchParticipation2005.pdf>

**Figure 1: Cycling Participation in the U.S. (2005)**



Source: Outdoor Industry Foundation (2006)

- Cyclists tend to have high levels of participation in other outdoor activities. The most popular crossover activities included hiking (52%), camping (44%) and fishing (43%).

## Economic Impact of the Cycling Tourism Sector

- The national recreation bicycling industry in the United States generates \$133 billion to the economy annually and supports an estimated 1.1 million jobs<sup>3</sup>.
- The 2003 Road World Cycling Championships held in Hamilton, Ontario in 2003 generated a total estimated economic activity of \$48.3 million in the province, including \$31.1 million in the Hamilton region and an additional \$17.2 million for other regions in Ontario. The Championships involved over 900 participants and an estimated 23,800 other visitors to the region, including 13,850 from Canada, 7,150 from the US, and an additional 2,760 from overseas countries<sup>4</sup>.
- Overnight spectators to the Road World Cycling Championships stayed an average of 4.8 nights in the Hamilton area and spent an average of \$112.15 per person per day<sup>5</sup>.
- Sea to Sky mountain biking trails that run through the North Shore (18,660 estimated riders), Squamish (8,910 estimated riders), and Whistler (25,695 estimated riders) brought nearly \$10.3 million in non-resident spending between June 1 and September 15 2006. The expenditures of these travellers supported 194 jobs in the Sea to Sky area<sup>6</sup>.
- The Whistler Bike Park is the most visited bike park in North America and accounts for approximately three-quarters of BC's bike park visits. During summer 2006 non-resident visitors to the Bike Park spent an estimated \$16.2 million in Whistler<sup>7</sup>.

<sup>3</sup> 2006 Active Outdoor Recreation Economy Bicycling Report, Outdoor Industry Foundation, available at <http://www.outdoorfoundation.org/pdf/ResearchRecreationEconomyBicycling.pdf>.

<sup>4</sup> 2003 UCI Road World Cycling Championships Economic Impact Assessment, Canadian Sport Tourism Alliance, available at [http://www.canadiansporttourism.com/app/DocRepository/1/reports\\_en/UCI\\_2003\\_Road\\_World\\_Cycling\\_Championship\\_Final.pdf](http://www.canadiansporttourism.com/app/DocRepository/1/reports_en/UCI_2003_Road_World_Cycling_Championship_Final.pdf)

<sup>5</sup> See (7) above.

<sup>6</sup> 2007 Sea to Sky Mountain Biking Economic Impact Study, Western Canada Mountain Biking Tourism Association, available at [http://www.mbta.ca/assets/pdfs/S2S\\_E\\_I\\_Study.pdf](http://www.mbta.ca/assets/pdfs/S2S_E_I_Study.pdf)

<sup>7</sup> See (9) previous page.



- The Crankworx Mountain Bike Festival in Whistler continues to grow, with in excess of 55,000 unique visitors attending the 2006 event, of which more than 23,000 travelled solely to attend the Festival, resulting in non-resident expenditures in excess of \$11.5 million<sup>8</sup>.
- Riding party expenditures in the Sea to Sky area varied from \$48.32 per person per day for an overnight trip to the North Shore to \$113.13 for visitors to the Whistler Bike Park. Visitors to Squamish paid \$53.94 per person per day while visitors to the Whistler Valley had expenditures of \$93.48 per person per day during the six month time period that data was collected<sup>9</sup>.

## Overview of the British Columbia Cycling Tourism Sector

### CYCLING IN BRITISH COLUMBIA

- The majority of non-resident mountain bikers in the Sea to Sky corridor were aged 30-39 years (41%) and an additional 22% were over 40 years. Over three-quarters (77%) of the mountain bikers surveyed on trails in the Sea to Sky corridor were male<sup>10</sup>.
- Nearly two-thirds (63%) of riders in the Whistler Bike Park during the summer 2006 were from the US or overseas, compared to 16% in Squamish, 7% in the North Shore and 52% in the Whistler Valley. There was very little crossover (less than 10%) between cyclists who travelled in the Whistler Valley and those who stayed at the Bike Park<sup>11</sup>.
- Non-resident cyclists surveyed in the Sea to Sky area typically travelled in groups of two or three riders and stayed in the region for an average of 4.8 nights. The number of nights stayed was slightly higher for visitors to the Whistler Bike Park at 5.0<sup>12</sup>.

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<sup>8</sup> See (9) previous page.

<sup>9</sup> See (9) previous page.

<sup>10</sup> See (9) previous page.

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