



Southwest Ontario Tourism Corporation 2017 Cycling Market Research Report

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1. Introduction:

Ontario's Southwest (OSW) partnered with Adventure Cycling, as recommended by Ontario-based cycling associations, to gather market research on the Ontario, New York State, Ohio, Pennsylvania and Michigan cycling markets. As the main geographic targets for the Ontario's Southwest region these provinces and states were the most applicable for outreach. The research was gathered through an online cycling survey, answering question about cyclist's current and future trips. The survey ran in the form of a banner ad on the Adventure Cycling website (www.adventurecycling.org) and was sent out to the Adventure Cycling database via newsletter. The promotion ran from April to July with a response from 105 cyclists.

2. Background of Adventure Cycling:

Adventure Cycling is a not for profit organization based out of Missoula, Montana. The organization aims to inspire and empower people to travel by bike. By developing cycling routes, publishing maps and providing tours they hope to advocate for better and safer cycling. Adventure Cycling provides a membership service with a print magazine dedicated to bike travel and an e-commerce store. Adventure Cycling is committed to growing bicycle tourism, for better roads, bike friendly trails and overall more biker friendly travel.

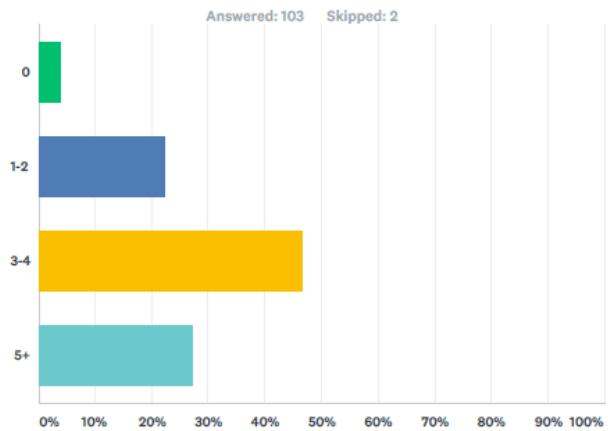
3. Key Takeaways

The results didn't offer any big surprises in understanding this travel market. The primary group of respondent were cyclists who are taking long distance trips, lasting 5+ nights who would travel long distances (400km+) to start their trip. Other key takeaways included:

- Majority prefer to travel self-guided with no support, and if they were to purchase luggage transfer services, would not pay very much for it (up to \$25/day). Of the 11% who would purchase a supported ride, they would mostly like pay \$50-\$75/day.
- Trip motivators are varied, but the top motivator being planned routes/itineraries
- This travel market relies on cycling websites and printed maps to make travel decisions, they also trust recommendations from friends and family which is consistent with most travel.
- They are looking for experiences that align with what Ontario's Southwest has to offer, including visiting other tourist attraction, opportunities to relax and enjoy local culinary.
- This travel market is interested in country-site/rural scenery the most, followed by wooded then waterfront.
- Their preferred accommodation type is camping, and camping came up a lot in the open comment sections of questions as well.

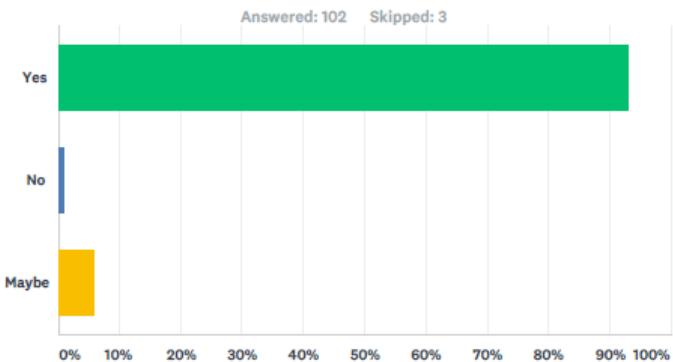
4. Full Survey Results

Q1 On average, how many holidays (at least 2 overnight stays) do you take in a year?



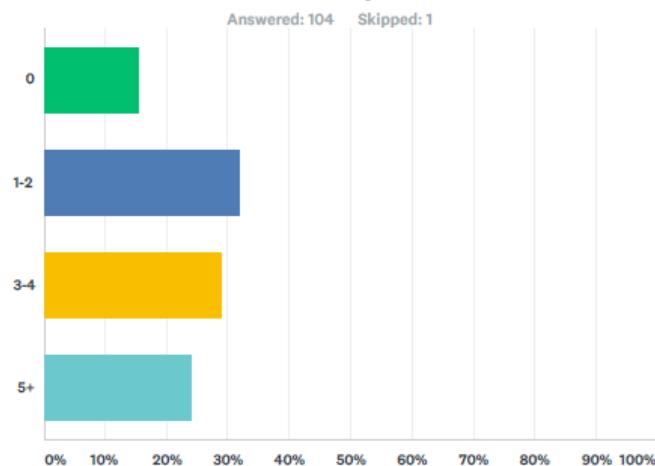
Answer Choices	Responses
0	3.88%
1-2	22.33%
3-4	46.60%
5+	27.18%
Total	103

Q2 Are you interested in taking holidays where bicycling is a significant part of the trip?



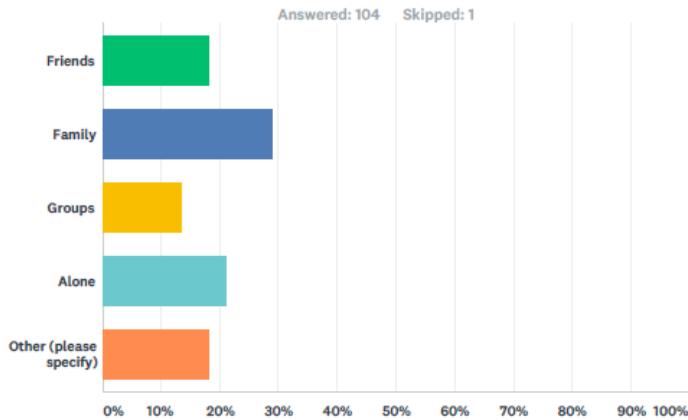
Answer Choices	Responses
Yes	93.14%
No	0.98%
Maybe	5.88%
Total	102

Q3 How many overnight pleasure trips (bicycle tours) have you taken in the past 2 years (where bicycling was a significant part of the trip)?



Answer Choices	Responses
0	15.38%
1-2	31.73%
3-4	28.85%
5+	24.04%
Total	104

Q4 Do you travel with (select all that apply):



Answer Choices	Responses
Friends	19
Family	30
Groups	14
Alone	22
Other (please specify)	19
Total	104

Comments:

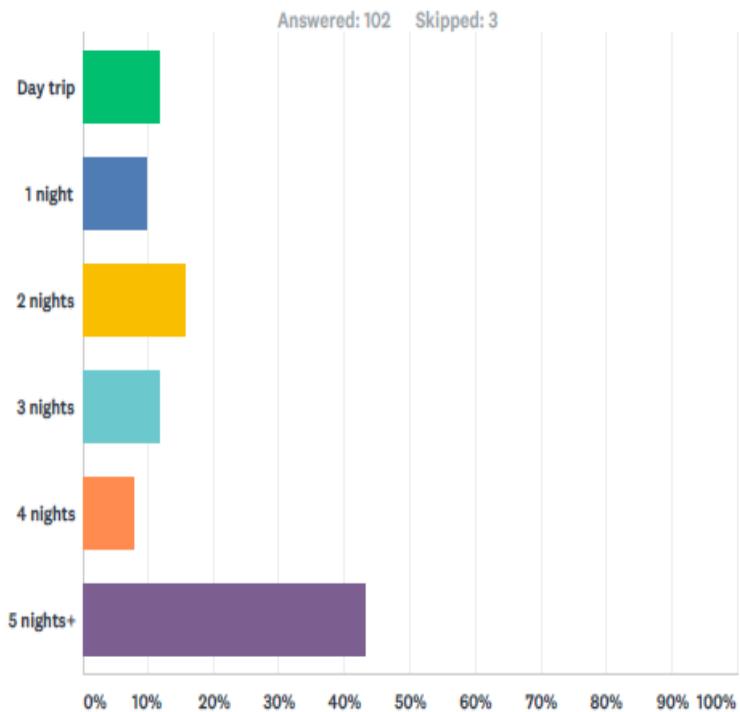
usually travell alone to meet / cycle with groups

Co-workers

Friends, Family and Alone. Could not select more than one!

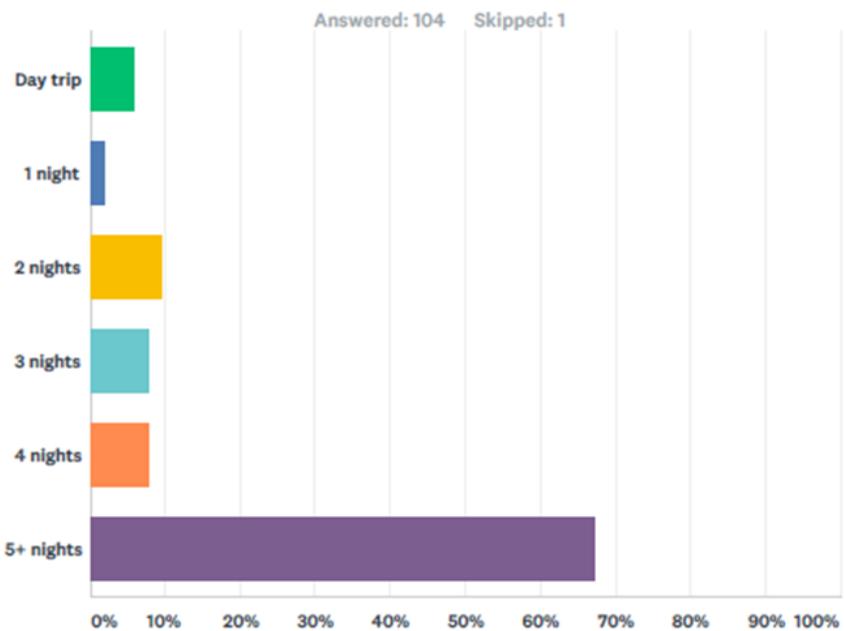
all of the above

Q5 What is the usual length of your bicycle holiday?



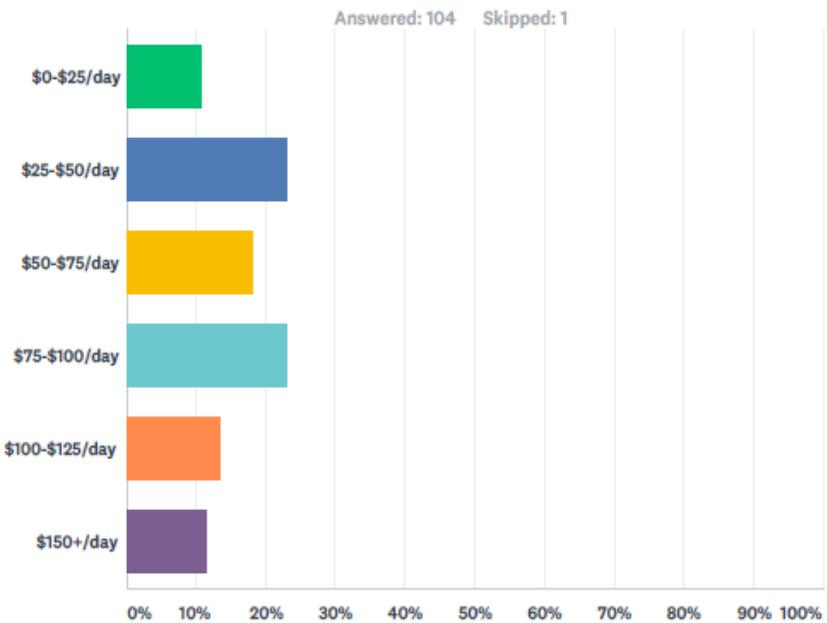
Answer Choices	Responses
Day trip	11.76%
1 night	9.80%
2 nights	15.69%
3 nights	11.76%
4 nights	7.84%
5 nights+	43.14%
Total	102

Q6 What is the ideal length of your bicycle holidays?



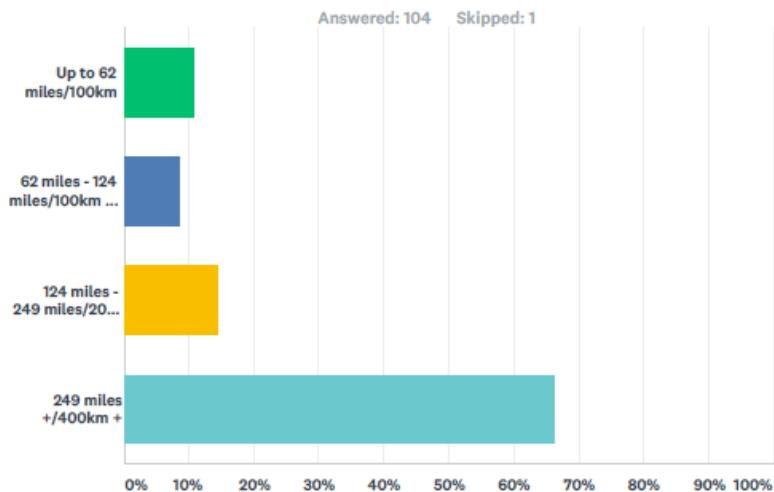
Answer Choices	Responses
Day trip	5.77%
1 night	1.92%
2 nights	9.62%
3 nights	7.69%
4 nights	7.69%
5+ nights	67.31%
Total	

Q7 On average including all of your expenses, how much would you spend per day on a bicycle trip?



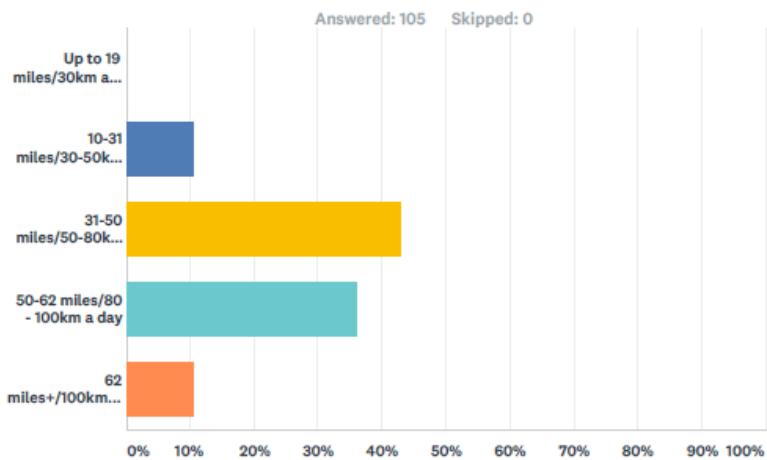
Answer Choices	Responses	
\$0-\$25/day	10.58%	11
\$25-\$50/day	23.08%	24
\$50-\$75/day	18.27%	19
\$75-\$100/day	23.08%	24
\$100-\$125/day	13.46%	14
\$150+/day	11.54%	12
Total		104

Q8 How far would you travel to start a bicycle trip?



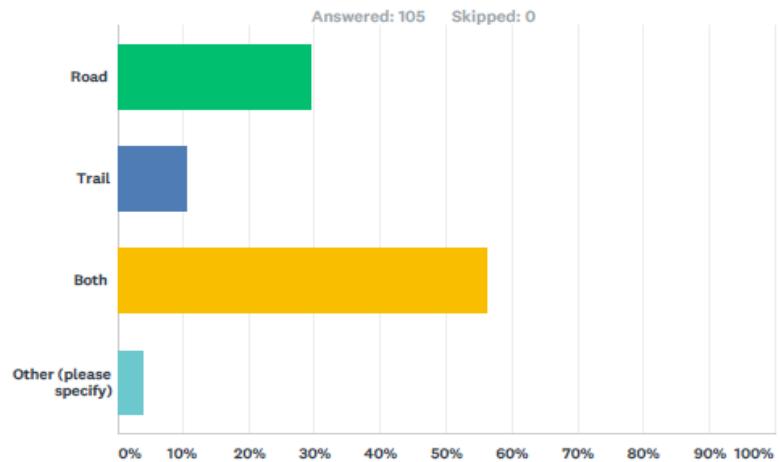
Answer Choices	Responses
Up to 62 miles/100km	10.58% 11
62 miles - 124 miles/100km - 200km	8.65% 9
124 miles - 249 miles/200km - 400km	14.42% 15
249 miles +/400km +	66.35% 69
Total	104

Q9 What is your preferred distance to travel daily by bike?



Answer Choices	Responses	
Up to 19 miles/30km a day	0.00%	0
10-31 miles/30-50km a day	10.48%	11
31-50 miles/50-80km a day	42.86%	45
50-62 miles/80 - 100km a day	36.19%	38
62 miles+/100km+ a day	10.48%	11
Total		105

Q10 Do you prefer to travel on road, or by trail?



Answer Choices	Responses
Road	29.52%
Trail	10.48%
Both	56.19%
Other (please specify)	3.81%
Total	105

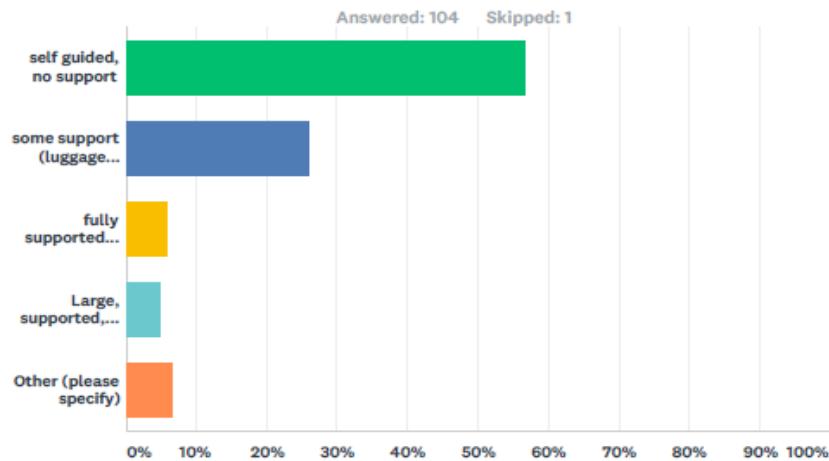
Comments:

paved trails/roads

typically i ride on the road or trail but not usually both in the same trip it is normally all road or all trail
small roads away from anything busy - gravel roads esp.

Whatever form of public transit presents the fewest problems if I arrive with a bike.

Q11 Do you prefer to travel: (select all that apply)



Answer Choices	Responses	
self guided, no support	56.73%	59
some support (luggage transfer, vehicle support)	25.96%	27
fully supported (guide, vehicle support, luggage transfer)	5.77%	6
Large, supported, organized cycling tours	4.81%	5
Other (please specify)	6.73%	7
Total		104

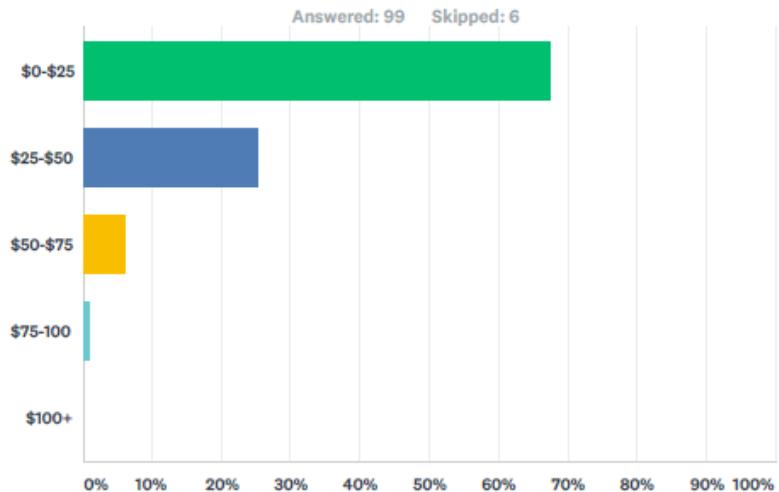
Comments:

self guided to large, supported organized events

self supported - will NEVER go supported. Destroys my trip because of itinerary.

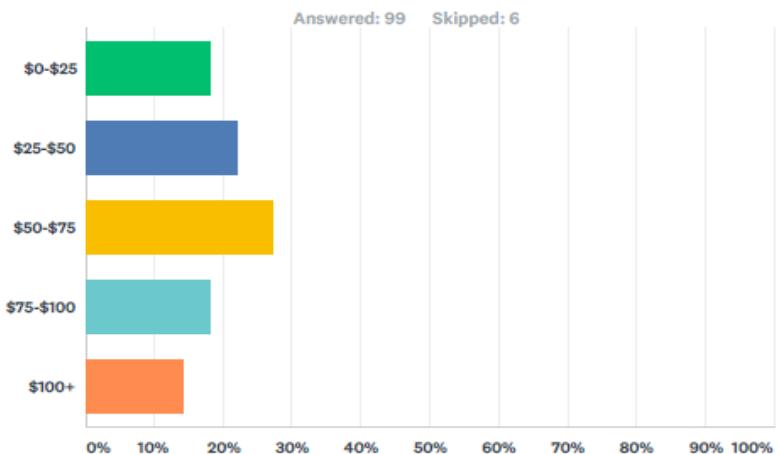
Large supported and self supported

Q12 If you were to hire luggage support, how much would you be willing to pay per day?



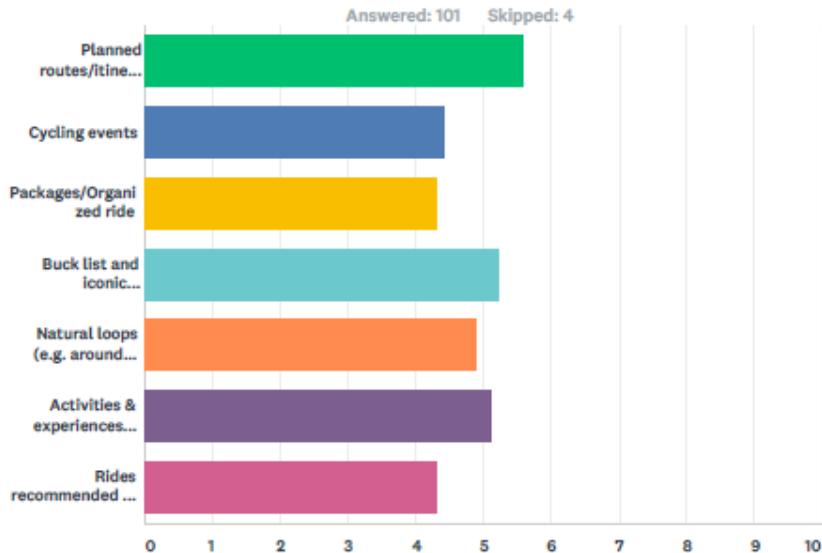
Answer Choices	Responses	
\$0-\$25	67.68%	67
\$25-\$50	25.25%	25
\$50-\$75	6.06%	6
\$75-100	1.01%	1
\$100+	0.00%	0
Total		99

Q13 If you were to purchase a guided bicycle tour, how much would you be willing to pay for a tour per day?



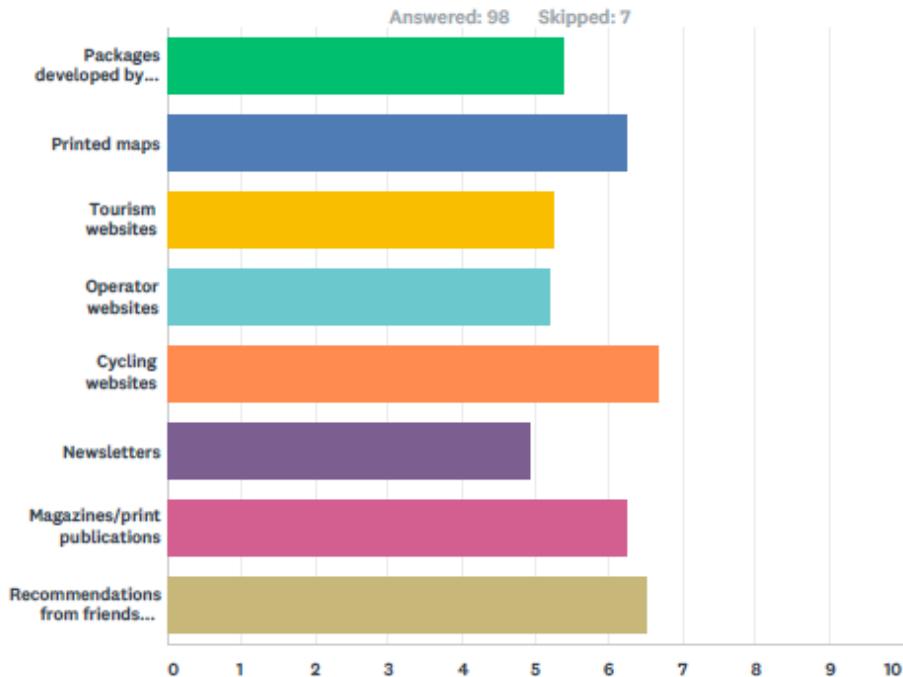
Answer Choices	Responses	
\$0-\$25	18.18%	18
\$25-\$50	22.22%	22
\$50-\$75	27.27%	27
\$75-\$100	18.18%	18
\$100+	14.14%	14
Total		99

Q14 How do you plan where to go? What are your trip motivators?
Please rank your top three:



	1	2	3	4	5	6	7	Total	Score
Planned routes/itineraries	32.05% 25	35.90% 28	11.54% 9	7.69% 6	6.41% 5	3.85% 3	2.56% 2	78	5.58
Cycling events	22.00% 11	18.00% 9	14.00% 7	14.00% 7	6.00% 3	10.00% 5	16.00% 8	50	4.42
Packages/Organized ride	16.07% 9	23.21% 13	19.64% 11	3.57% 2	7.14% 4	16.07% 9	14.29% 8	56	4.32
Bucket list and iconic trails/rides	34.29% 24	17.14% 12	27.14% 19	2.86% 2	5.71% 4	4.29% 3	8.57% 6	70	5.24
Natural loops (e.g. around a lake)	25.45% 14	14.55% 8	20.00% 11	16.36% 9	14.55% 8	5.45% 3	3.64% 2	55	4.89
Activities & experiences available along the way	20.31% 13	20.31% 13	35.94% 23	9.38% 6	7.81% 5	1.56% 1	4.69% 3	64	5.13
Rides recommended by friends & family	5.56% 3	25.93% 14	24.07% 13	11.11% 6	11.11% 6	14.81% 8	7.41% 4	54	4.30

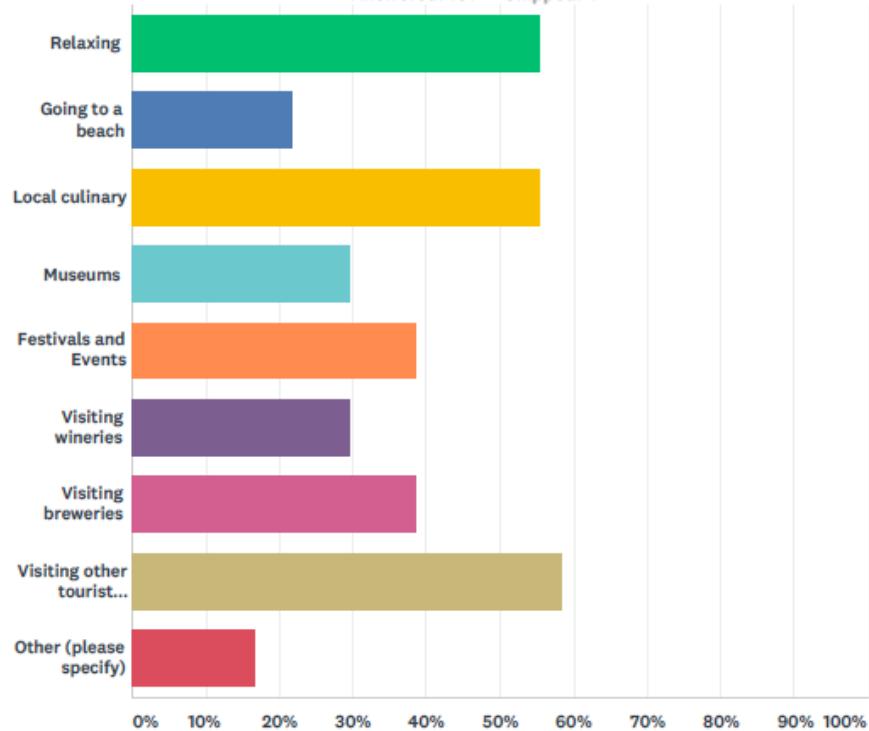
Q15 Where do you get your information when making a bike trip decision? Please rank your top three:



	1	2	3	4	5	6	7	8	Total	Score
Packages developed by tour operators	16.67% 6	22.22% 8	27.78% 10	2.78% 1	5.56% 2	8.33% 3	5.56% 2	11.11% 4	36	5.39
Printed maps	31.03% 18	20.69% 12	27.59% 16	5.17% 3	3.45% 2	5.17% 3	3.45% 2	3.45% 2	58	6.24
Tourism websites	5.88% 2	20.59% 7	35.29% 12	8.82% 3	5.88% 2	11.76% 4	8.82% 3	2.94% 1	34	5.26
Operator websites	13.33% 4	23.33% 7	23.33% 7	6.67% 2	6.67% 2	3.33% 1	16.67% 5	6.67% 2	30	5.20
Cycling websites	43.84% 32	21.92% 16	19.18% 14	5.48% 4	2.74% 2	1.37% 1	1.37% 1	4.11% 3	73	6.68
Newsletters	6.06% 2	18.18% 6	30.30% 10	9.09% 3	12.12% 4	3.03% 1	12.12% 4	9.09% 3	33	4.94
Magazines/print publications	17.86% 10	39.29% 22	25.00% 14	3.57% 2	5.36% 3	3.57% 2	1.79% 1	3.57% 2	56	6.25
Recommendations from friends, family or forums	34.48% 20	31.03% 18	17.24% 10	3.45% 2	3.45% 2	6.90% 4	1.72% 1	1.72% 1	58	6.53

Q16 What other types of experiences and activities do you enjoy while biking or on a cycling tour? Select your top three:

Answered: 101 Skipped: 4

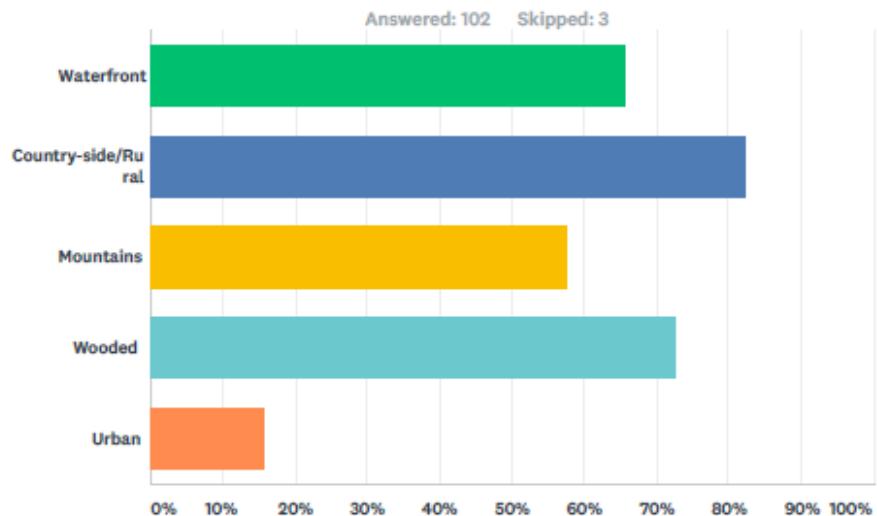


Answer Choices	Responses
Relaxing	55.45% 56
Going to a beach	21.78% 22
Local culinary	55.45% 56
Museums	29.70% 30
Festivals and Events	38.61% 39
Visiting wineries	29.70% 30
Visiting breweries	38.61% 39
Visiting other tourist attractions	58.42% 59
Other (please specify)	16.83% 17
Total Respondents: 101	

Comments:

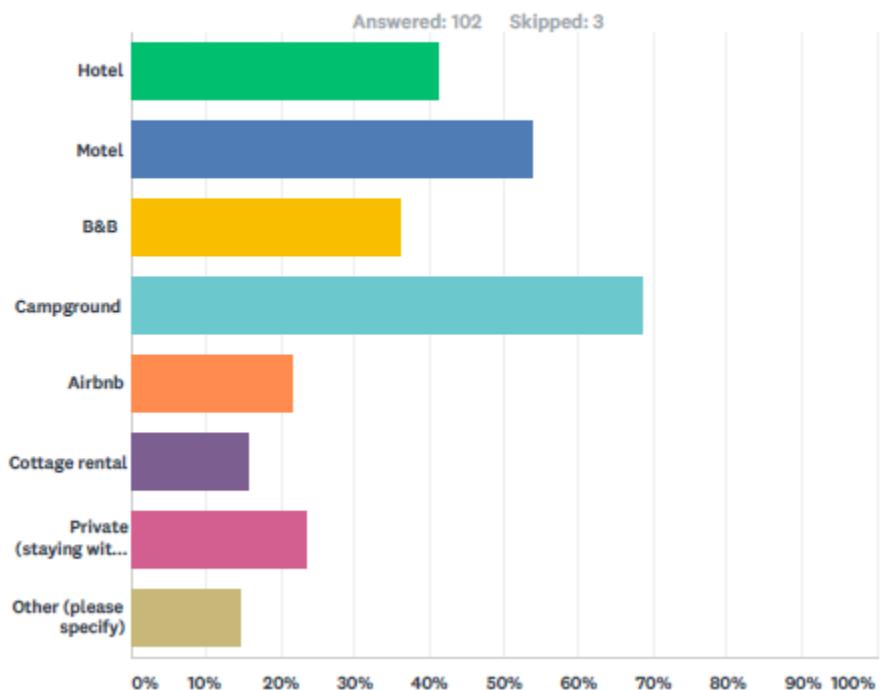
hiking, camping. Unplanned events or "serendipity"
 Local region villages, businesses, history, etc.
 visiting family and friends
 national and state parks
 meeting people
 camping and lack of structure

Q17 What type of scenery do you enjoy?



Answer Choices	Responses
Waterfront	65.69%
Country-side/Rural	82.35%
Mountains	57.84%
Wooded	72.55%
Urban	15.69%
Total Respondents: 102	

Q18 If you stay overnight what type of accommodation do you book?

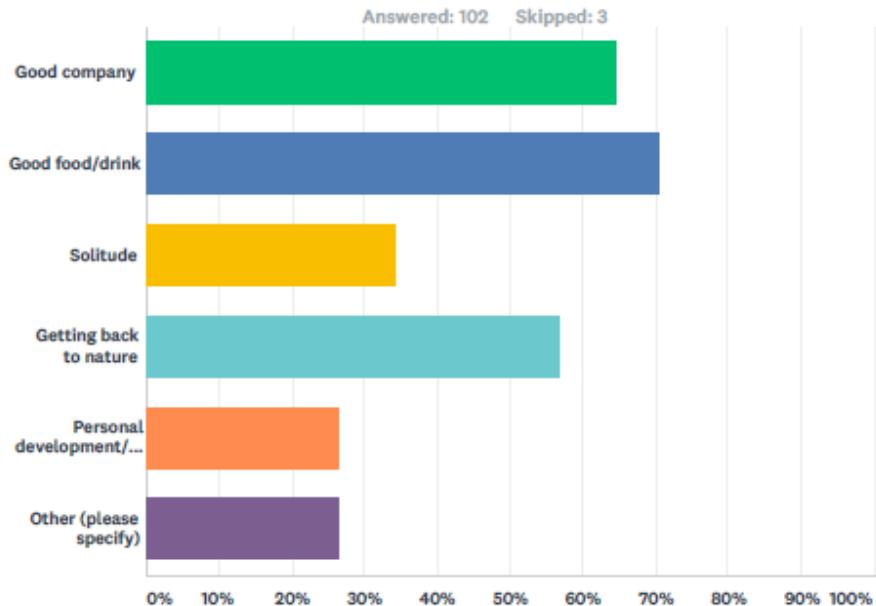


Answer Choices	Responses
Hotel	41.18% 42
Motel	53.92% 55
B&B	36.27% 37
Campground	68.63% 70
Airbnb	21.57% 22
Cottage rental	15.69% 16
Private (staying with friends or family)	23.53% 24
Other (please specify)	14.71% 15
Total Respondents: 102	

Comments:

I'd like to be able to stay at campgrounds in the future, so I'm trying now to learn about camping
 Any of the above
 Hostels
warmshowers.org

Q19 What are the qualities of a first class bike trip? Please select your top three:



Answer Choices	Responses
Good company	64.71% 66
Good food/drink	70.59% 72
Solitude	34.31% 35
Getting back to nature	56.86% 58
Personal development/training	26.47% 27
Other (please specify)	26.47% 27
Total Respondents: 102	

Question 20: Is there a trip theme, destination or service that if available would motivate you to take more bike trips?

Comments:

Trips that take into account my abilities to cycle and lower cost trips.

I'm interested in mini/micro trips that would teach me about camping, but most of those take place over full weekends, which don't work for me.

transportation back to point of origin

Just More Time

Following rivers. Good campgrounds.

Great value, low cost, reasonable accommodations, skip the 5 star hotel's

5. Conclusion

This market research will be used to help OSW in future development and marketing for cycle tourists. Overall the research confirmed OSW should continue to offer information online, support trail and itinerary development, and support self-guided rides. At this time there does not appear to be a major demand for luggage transfer services or guided long distance rides. Please note this market was the long distance cycle tourist, those who travel by bike, vs. travellers who bike as a part of their trip. More information may be needed to understand riders who are renting bikes and participating in same day guided tours to explore a destination.