

Tourism behavior and economic impact of the touristic practice of cycling in Quebec

Tourism Bikenomics session
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CHAIRE

**de tourisme
Transat**

ESG UQÀM

Presentation Plan

- Context and Methodology
- Sociodemographic portrait of the tourist cyclist
- Tourism behaviors
- Conclusion



1

Context and Methodology



Where is Quebec



Population:
8.3 million

Project partners



Vélo Québec

Tourisme
CANTONS-DE-L'EST



Purpose of the Study

- Better understand bike tourists needs and evaluate actual and potential outcome of this segment
- Establish a complete profile of the bike tourists that are users of Quebec bikeway network
 - Motivations
 - Planning habits
 - Travel behavior
 - Travel spending
 - Level of satisfaction
 - Etc.



Methodology

- Approach that is the most representative possible from the touristic use of the bikeway network
- Web survey conducted with email database gathered from 4 distinct sources:
 - Coupons distributed in the Bienvenue cyclistes! certified accommodations
 - Vélo Québec Database
 - Waterfront Trail in Ontario Database
 - League of American Bicyclists Database

Initial objective

- The initial sampling plan aimed:
 - 400 respondents from Quebec cyclists
 - 200 respondents from outside of Quebec cyclists

Final sampling

- Final sampling of respondents that made a trip of one or more nights in Quebec that included a cycling activity:
 - 1 254 respondents among Quebec cyclists
 - 219 respondents out of the province cyclists

Coupons



VOUS FAITES DU VÉLO PENDANT VOTRE SÉJOUR ?

**COUREZ LA CHANCE DE GAGNER UN SÉJOUR D'UNE VALEUR DE 500 \$
DANS L'UNE DE NOS RÉGIONS TOURISTIQUES ainsi que des livres sur les circuits
cyclables au Québec en répondant à notre sondage* !**

Votre opinion sur le tourisme à vélo au Québec est importante afin d'améliorer le développement de cette activité. La Chaire de tourisme Transat de l'ESG UQAM souhaiterait vous envoyer un questionnaire par courriel, afin de connaître vos habitudes de pratique lors de vos séjours au Québec.

Merci d'avance et bonne chance pour le tirage !

Groupe d'âge: 18-24 ans 25-34 ans 35-49 ans 50-64 ans 65 ans et plus

Sexe: Femme Homme

Durée du séjour: _____

Pays d'origine / Province / État: _____ Québécois, région de provenance: _____

Est-ce que faire du vélo était la principale activité de ce séjour ? Oui Non

Adresse courriel (en majuscules): _____@_____

Soyez assuré(e) que vos réponses resteront confidentielles et anonymes, et que votre adresse courriel ne sera utilisée à aucune autre fin que ce sondage.

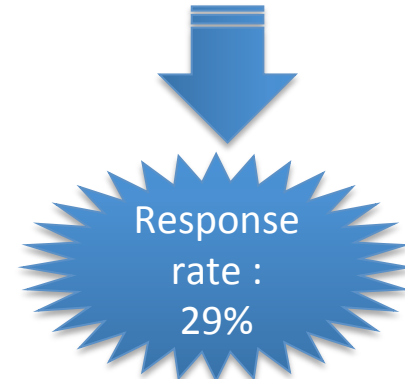
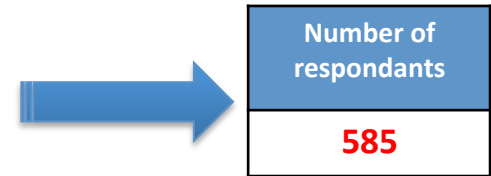
* Les règlements du tirage vous seront transmis en même temps que le sondage.

Samples



Number of accommodations solicited	Number of accommodations that participated	Number of coupons distributed
203	131	7 415

Répartition des coupons récoltés	
Bas-Saint-Laurent	147
Cantons-de-l'Est	291
Centre-du-Québec	82
Chaudière-Appalaches	154
Gaspésie	52
Lanaudière	148
Laurentides	433
Mauricie	96
Montérégie	38
Montréal	10
Région de Québec	159
Outaouais	142
Saguenay-Lac-Saint-Jean	246
Total	1998



Survey conducted between October 7th and October 23th 2014

The samples



- Database formed of about 80 000 cyclists (travel agency, VQ events, members and newsletter subscribers)
- Survey conducted between October 7th and October 23th 2014



Waterfront Trail
A signature project of the Waterfront Regeneration Trust

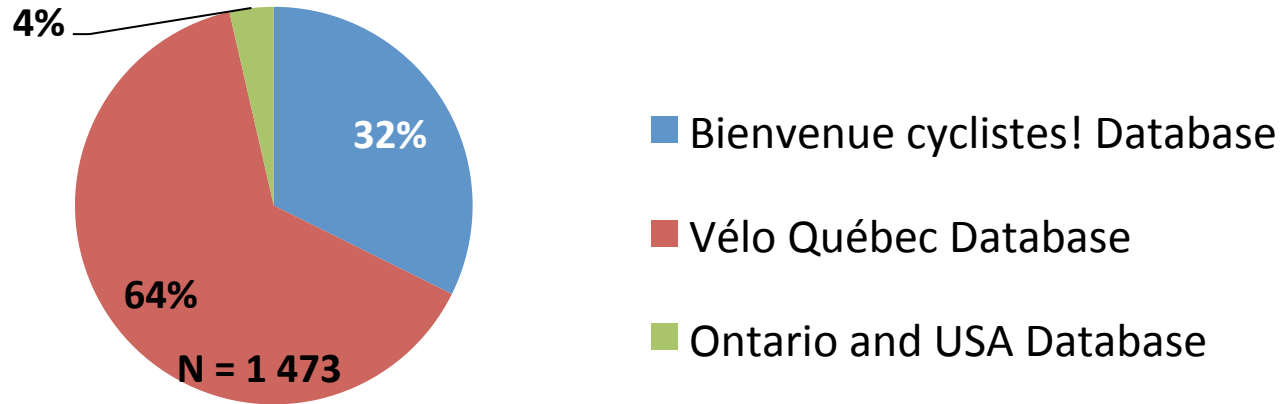
- Database of 3 600 cyclists from Ontario (neighboring province)
- Survey conducted between October 23th and October 29th 2014



- Database of 1 880 american cyclists members of the association
- Survey conducted between October 16th and October 29th 2014

Respondants

- Distribution of the sample that made a trip of one or more nights in Quebec that included a cycling activity in 2014



Respondant Characteritics

- Respondants are 18 of age and older
- To qualify, had to practice cycling in Quebec during a trip of one or more nights during 2014 season
- Survey during fall to gather all the information concerning bike trips during the whole season and to maximise the sampling.

Weighting

- Weighting established among respondants from Bienvenue cyclistes! database
- Numbers of coupons sent took into consideration the potential volume of each accommodation
- To correct the oversize of few accommodation samples, we considered the volume of coupons sent vs the volume received

Research implementation process

1. Choice of
methodology

2.
Questionnaire
development

3. Field study

4. Survey

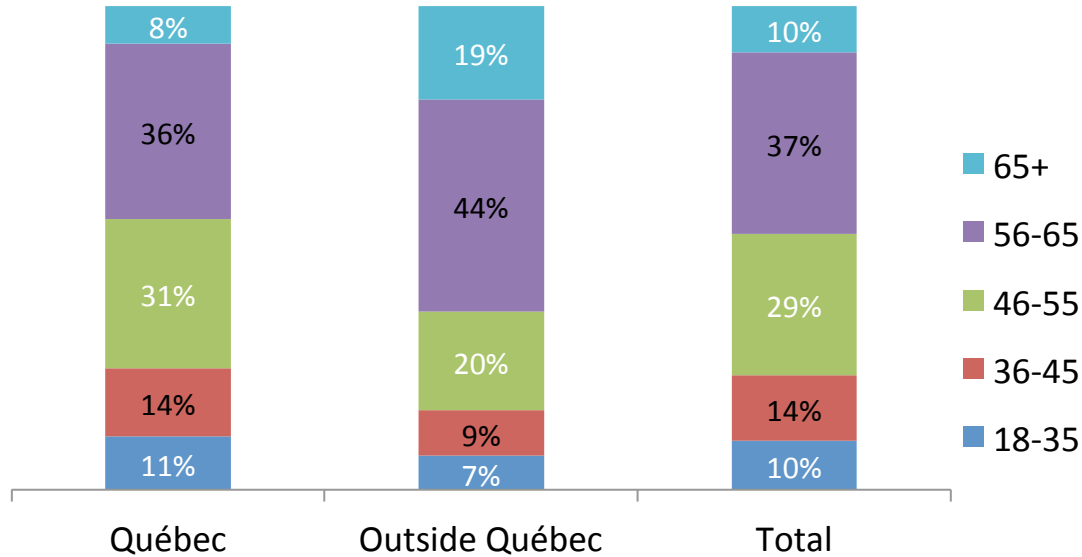
5. Data
Analysis

April to December 2014

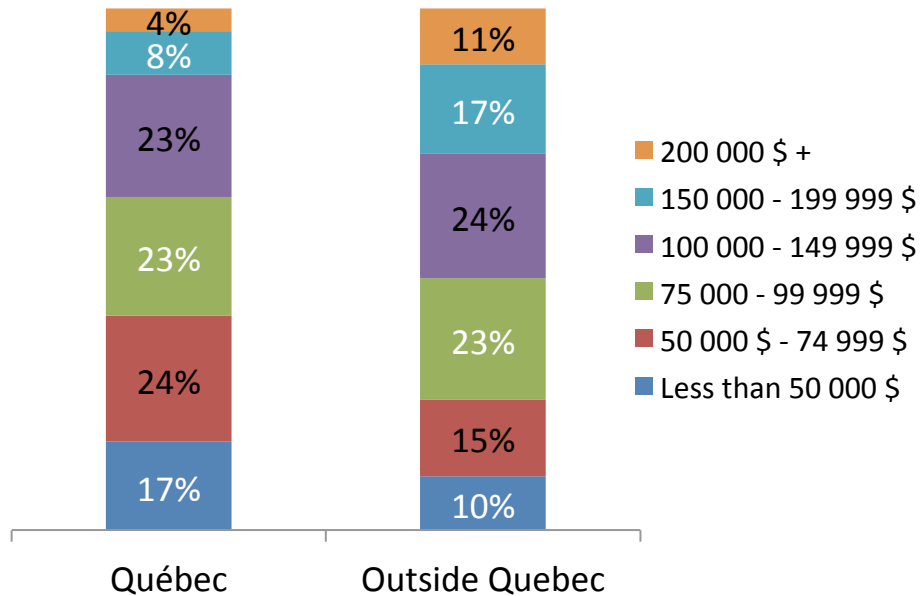
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Sociodemographic portrait of the tourist cyclist

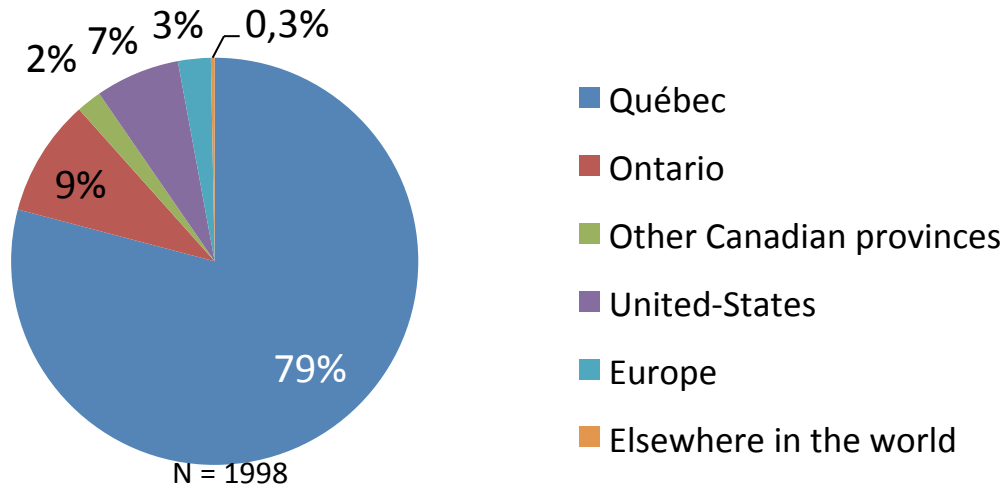




- 66% aged between 46 and 65
- Cyclists from outside the province tend to be older (63% 55+ vs 44%)



- Tourist cyclists present higher income
- More than half (52%) of the cyclists from outside make 100k+
- Cyclists from outside the province have higher household income



- 21% of bike tourists come from outside Quebec
- Distribution similar to the Quebec overall tourism pattern

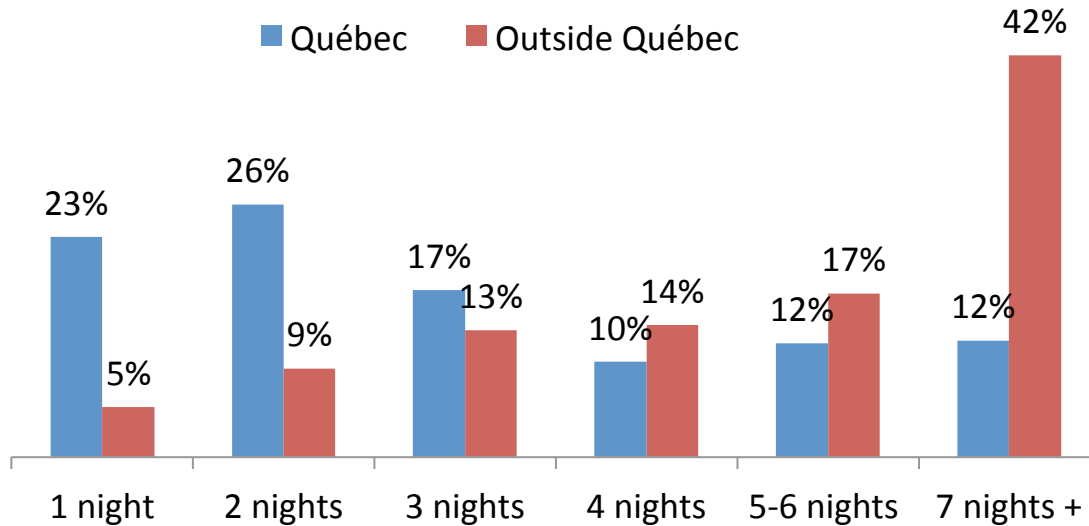
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Tourism behaviors



Tourism behaviors

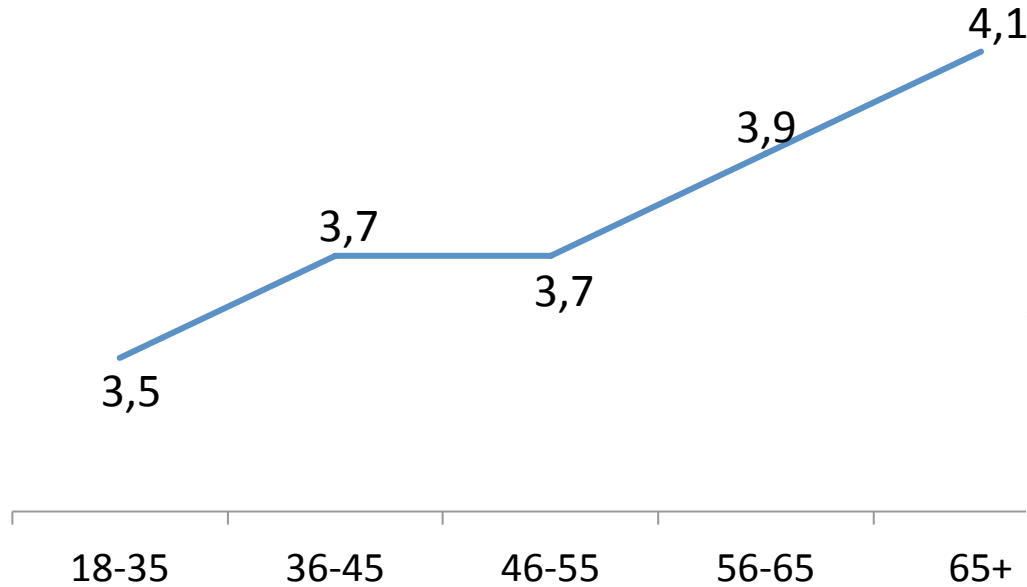
Length of the trips



- Quebecers : 4 nights in average per stay
- Other markets : 7 nights in average per stay (42% stay at least a week)
- 46% of the trips of the 55+ are 4 nights and over

Tourism behaviors

Hours of cycling per day

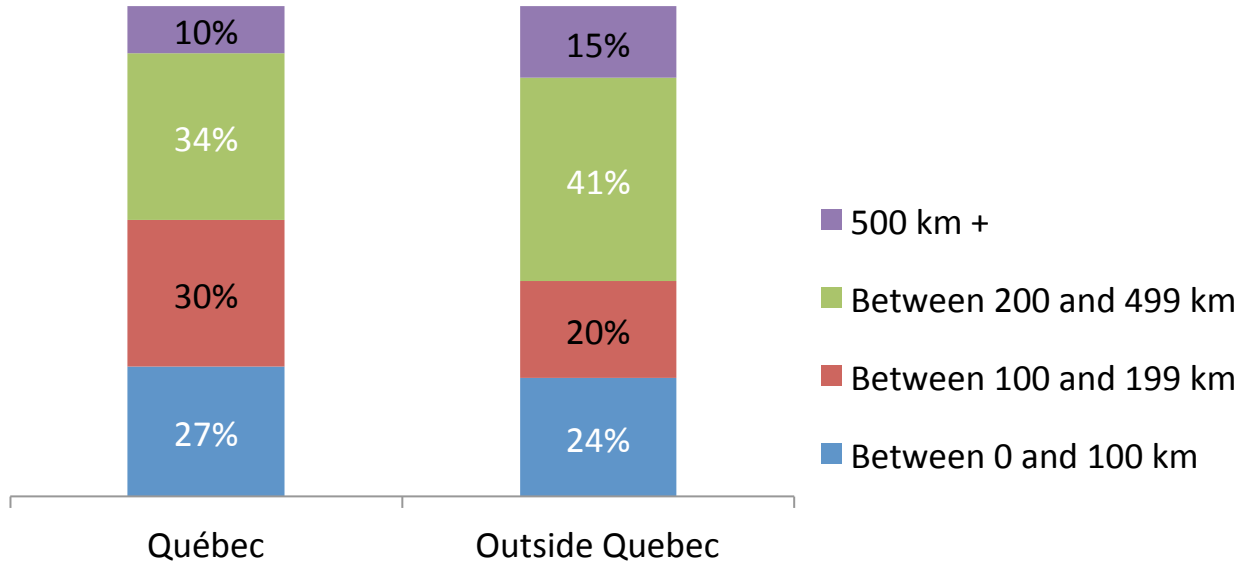


- 3.8 hours per day in average
- 21 hours of biking per trip
- The older they get, the more they cycle!



Tourism behaviors

Numbers of kilometers per stay



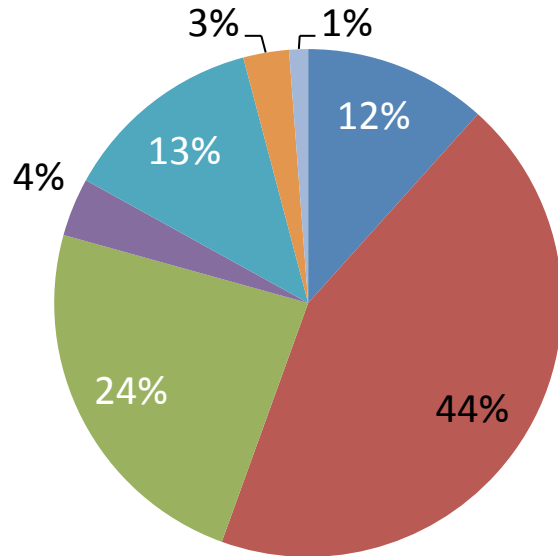
- 56% of the bike tourists from outside Québec cycled over 200 km
- Only a quarter cycled less than 100 km

Segment	Average per stay	Average per day
Quebec	554\$	210\$
Outside Quebec	1391\$	243\$
Used Route verte	736\$	229\$
Total average	676\$	214\$

- Bikeway over 5000 kilometers linking all parts of Quebec
- Velo Quebec is responsible for its development and coordination



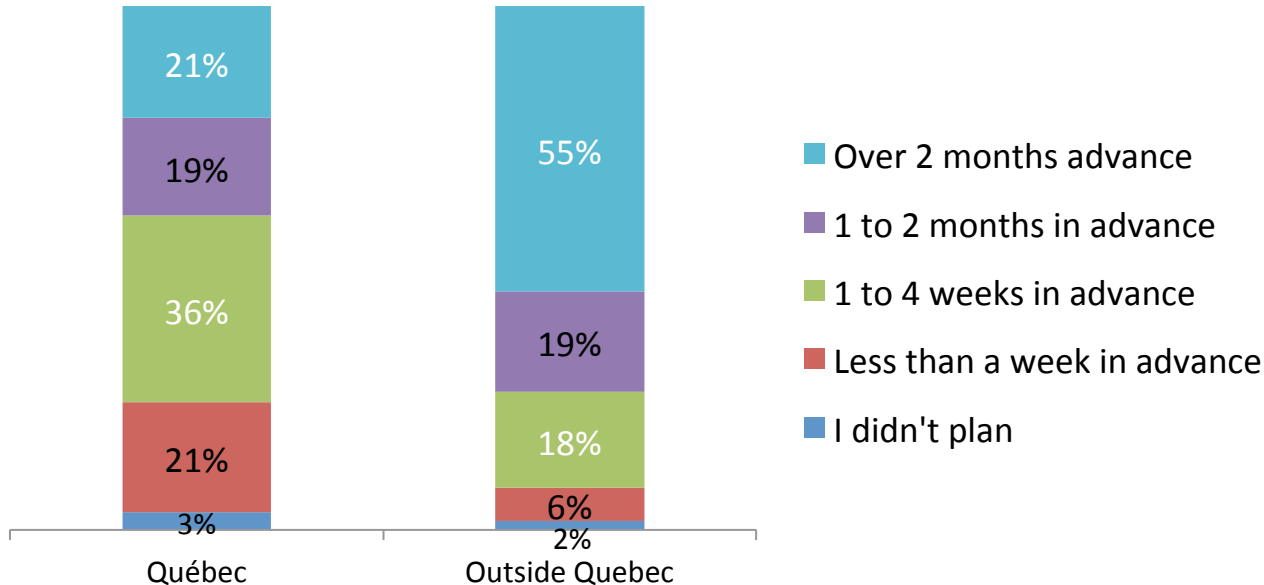
- Average spending for a group of two
- Bike tourists spend more than average leisure tourists (202\$)
- 56-65 segment spends the most (242\$/day)



- Lodging explains 44% of the spending
- 37% of spending related to food

Tourism behaviors

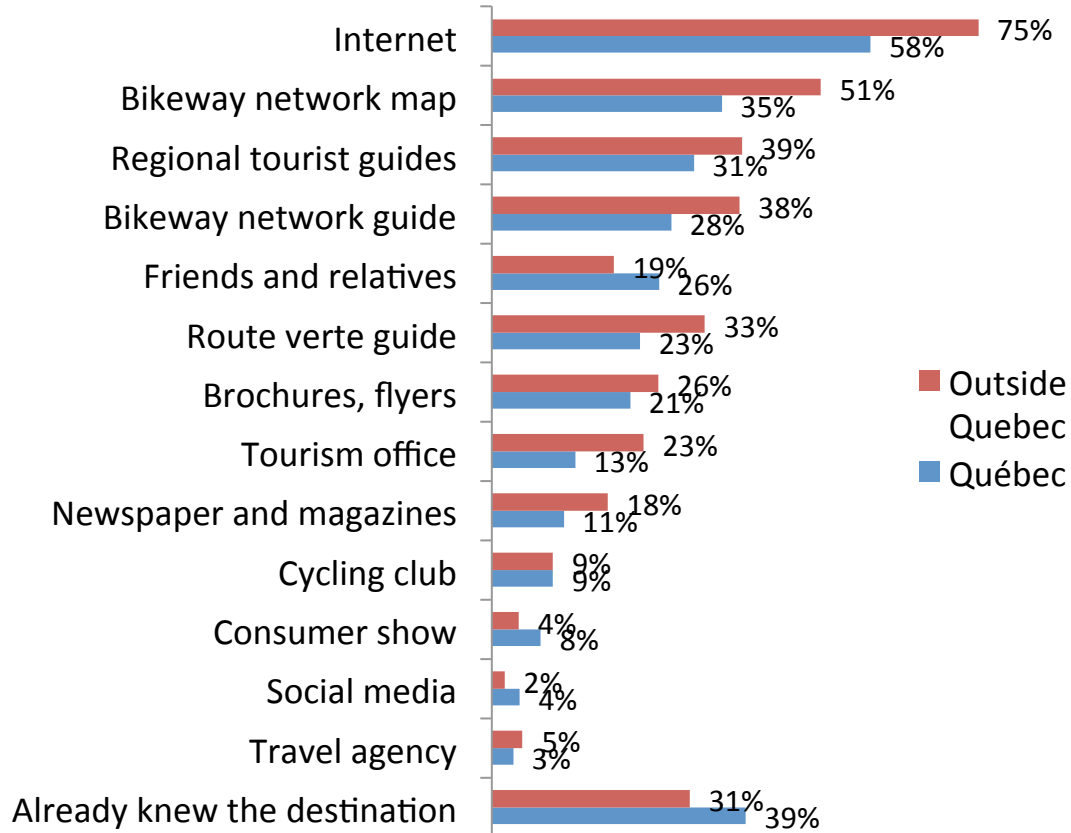
Time of planning



- Outside markets plan long in advance (2 months +, 55%)
- Strong correlation between length of stay and time of planning
- 18-35 more encline to plan last minute

Tourism behaviors

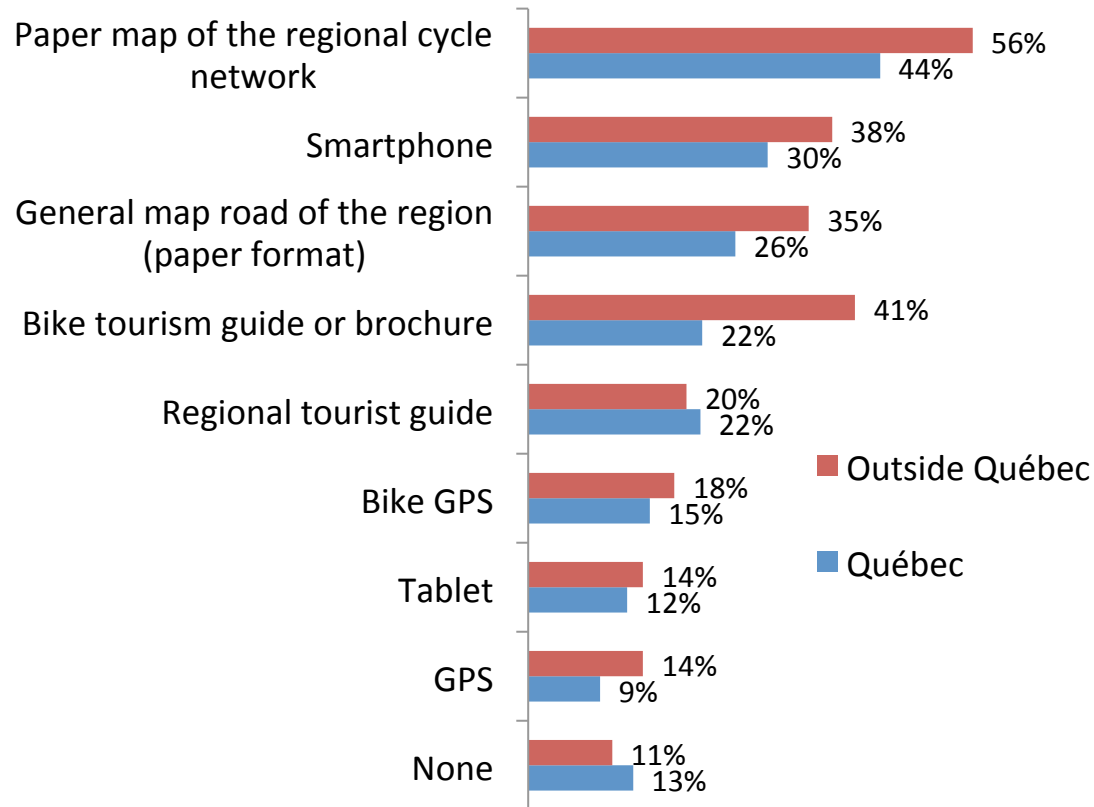
Information used for planning



- 3 types of information used in average to plan
- Web is an essential, specially for outside markets (75%)
- Bikeway network map 2nd in importance

Tourism behaviors

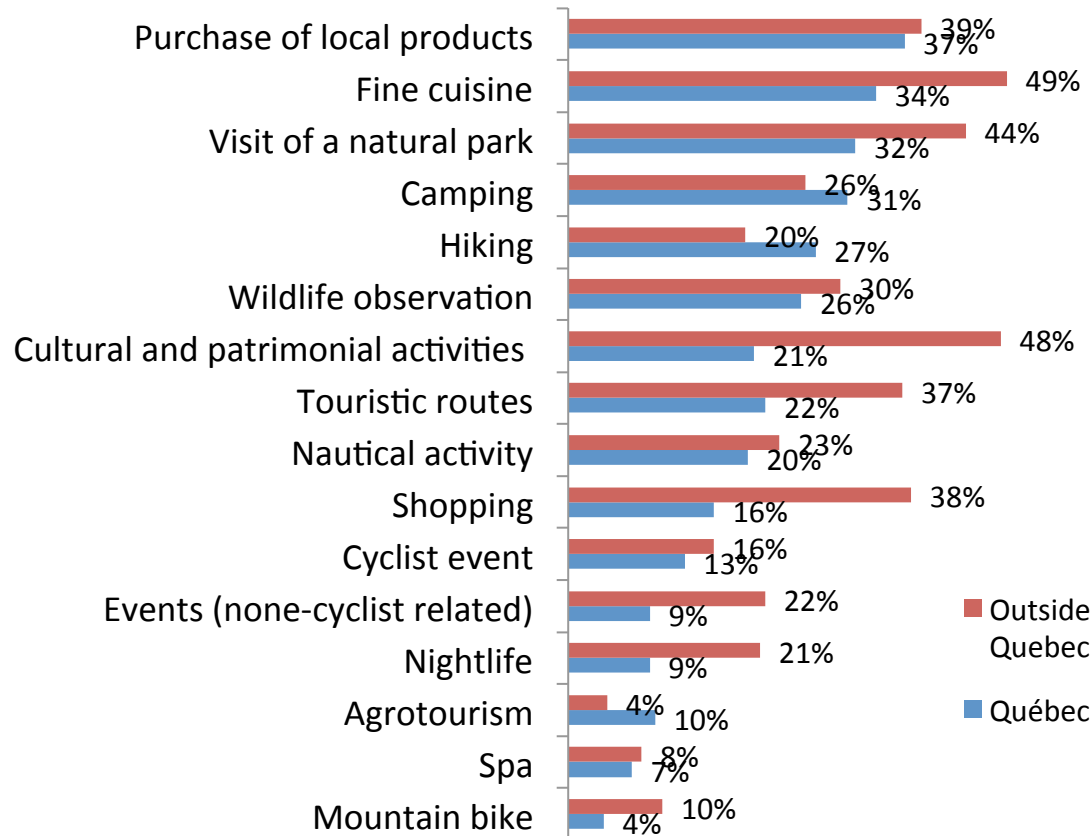
Tools used at destination



- Smartphones 2nd useful tool at destination (32%)
- Bike tourism guides or paper maps very helpful for outside markets (41%)
- 18-35 rely mainly (55%) on their smartphones

Tourism behaviors

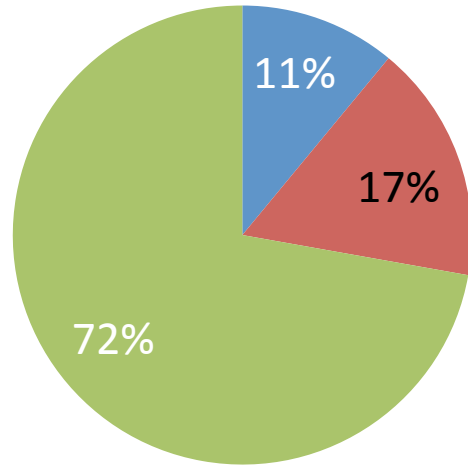
What activities other than cycling



- Bike tourists are very active! (4 activities in average par stay)
- Gastronomy and outdoor is a good match
- Half of tourists from outside went in a fine restaurant or participated in a patrimonial / cultural activity

Tourism behaviors

Was the trip part of a package?



■ Yes, totally

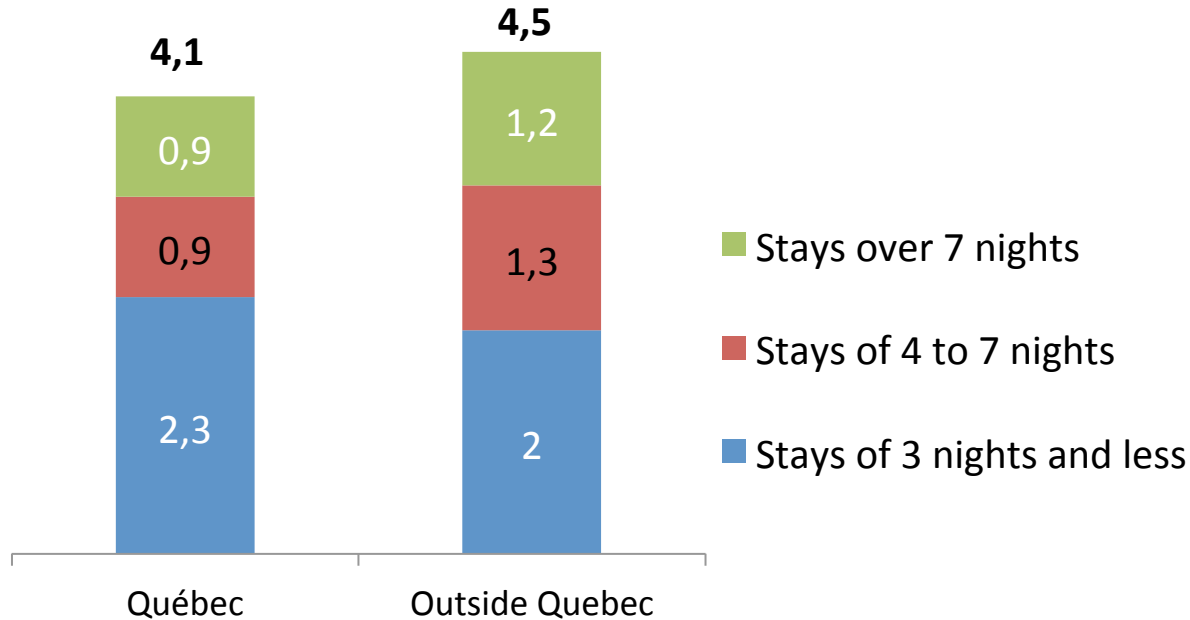
■ Yes, partially

■ No

- 28% of tourists bought a travel package
- 33% of 55+ used a package
- Only 8% of the 18-35 chose a package

Tourism behaviors

Number of cycling trips (last two years)



- Over 4 trips in average in the last two years
- About half of trips of 4 or more nights

Conclusion

Huge contribution for the Quebec economy

- Overall **spendings** for bike tourism in Quebec is estimated to 700 M\$ (**500 M euros**). Tourists from outside the province = 15%.
- Bike tourism responsible for **6 800 jobs** in Quebec
- Bike tourism gives back to our governments over 139 M\$ (**100 M euros**) in revenues





Thank you for listening
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Novek

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