

CYCLE TOURISM INSIGHTS

North American Market Summary

Based on September 2024 survey (sample n=1,400)

FEBRUARY 2025

NORTH AMERICAN CYCLE TOURISM MARKET

The incidence of cycle tourism consumers (both current and prospective markets) is 19% on the West Coast, 17% on the East Coast and 22% in Vancouver. This corresponds to estimated cycle tourism market sizes of **590,000** in Vancouver, **9.8 million** on the West Coast of the US and **18.4 million** on the East Coast.*

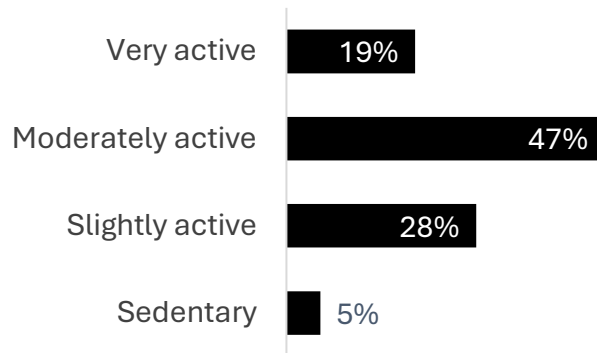


PROFILING THE CYCLE TOURISM MARKET

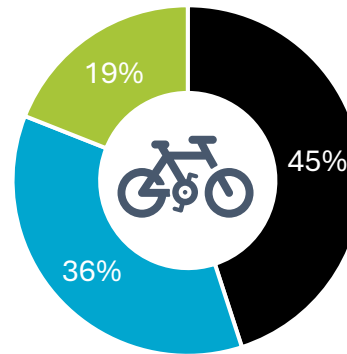
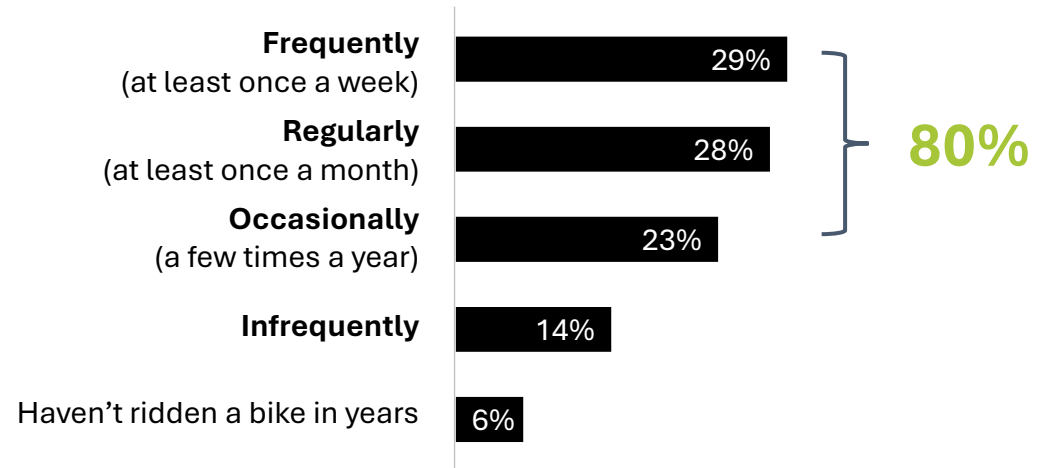
North American cycle tourism consumers tend to be younger (primarily in the 18-39 age range) and predominantly male (63%).

27% have travelled internationally specifically for a cycling experience

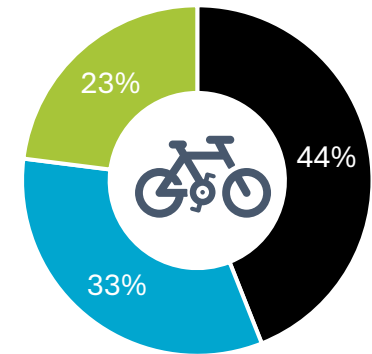
FITNESS LEVEL



CYCLING EXPERIENCE



- Mainly road cycling
- An even mix of both
- Mainly mountain biking / off-road



- Short distances (under 20km)
- An even mix of both
- Longer distances (over 20km)

CURRENT MARKET – CYCLE TOURISM ACTIVITIES (PAST 12 MONTHS)

Among those who participated in cycling activities while travelling for leisure in the past year, the most popular activities included cycling in urban areas, on trails, and in national, regional, or state parks. Event participation was also strong, with 15% attending as participants and 14% as spectators.



65%

Cycled in an urban area



61%

Cycled on a bike or
mountain bike trail



59%

Cycled in national,
regional or state park



34%

Cycled at a
mountain bike park



35%

Cycled to/around specific
destination or attraction



14%

Multi-day 'bike-packing'
or cycle touring trip



15%

Attended cycling event
(as a participant)



14%

Attended cycling event
(as a spectator)

PROSPECTIVE MARKET - INTEREST IN CYCLE TOURISM ACTIVITIES (NEXT 2 YEARS)

The prospective market shows strong interest in cycling in parks, with three out of four expressing a desire to cycle in national, regional, or state parks while travelling for leisure in the next two years.



54%

Cycling in an urban area



59%

Cycling on a bike or mountain bike trail



73%

Cycling in national, regional or state park



38%

Cycling at a mountain bike park



48%

Cycling to/around specific destination or attraction



19%

Multi-day 'bike-packing' or cycle touring trip



16%

Attending cycling event (as a participant)



15%

Attending cycling event (as a spectator)

DRIVERS OF CYCLE TOURISM ACTIVITY

Enjoying beautiful landscapes and connecting with nature, staying active while travelling, and exploring and seeking new adventures, are key drivers of cycle tourism participation.

TOP 5 REASONS THE CURRENT CYCLE TOURISM MARKET DID A CYCLE TOURISM ACTIVITY IN THE PAST YEAR



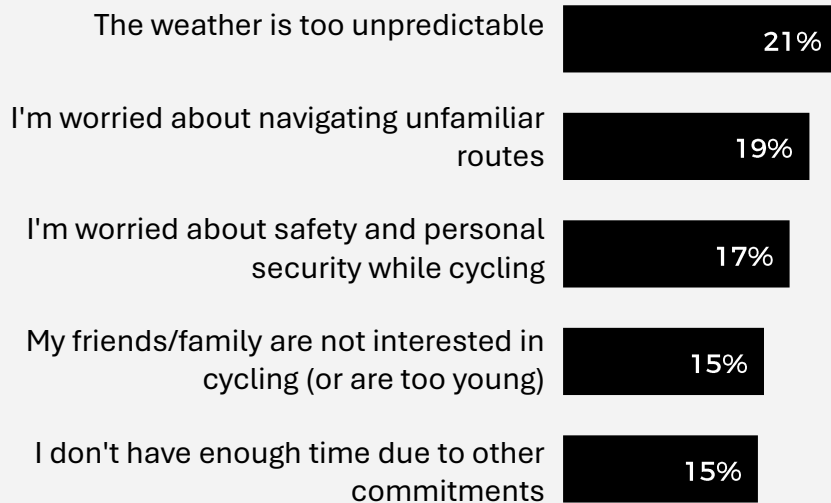
TOP 5 REASONS THE PROSPECTIVE CYCLE TOURISM MARKET IS INTERESTED IN DOING A CYCLE TOURISM ACTIVITY IN FUTURE



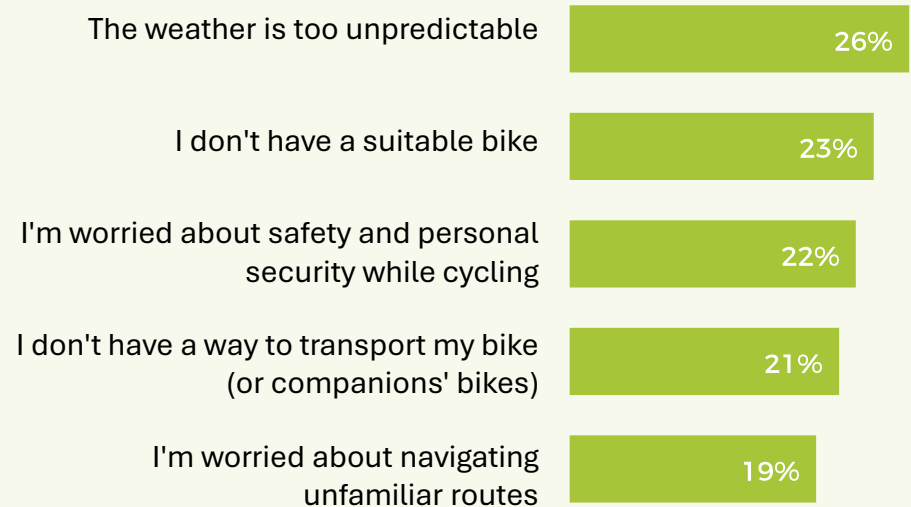
BARRIERS TO CYCLE TOURISM ACTIVITY

The most prominent barrier for both current and prospective markets is unpredictable weather. Other notable deterrents include concerns about navigating unfamiliar routes, and concerns about personal safety while cycling.

TOP 5 BARRIERS TO PARTICIPATING IN A CYCLE TOURISM ACTIVITY FOR THE CURRENT CYCLE TOURISM MARKET



TOP 5 BARRIERS TO PARTICIPATING IN A CYCLE TOURISM ACTIVITY FOR THE PROSPECTIVE CYCLE TOURISM MARKET

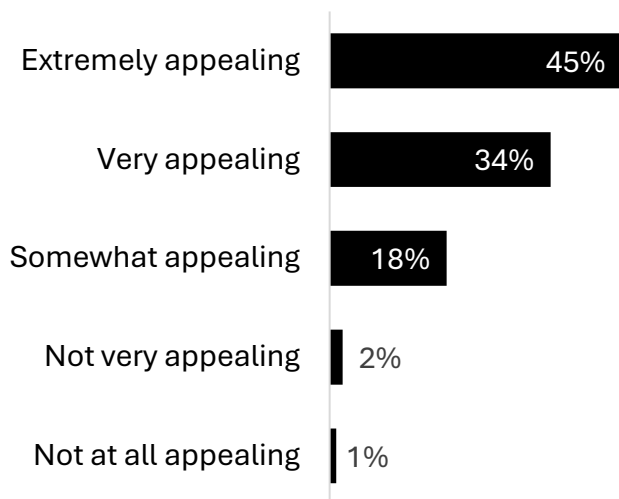


KNOWLEDGE & INTEREST - NGĀ HAERENGA NZ CYCLE TRAILS

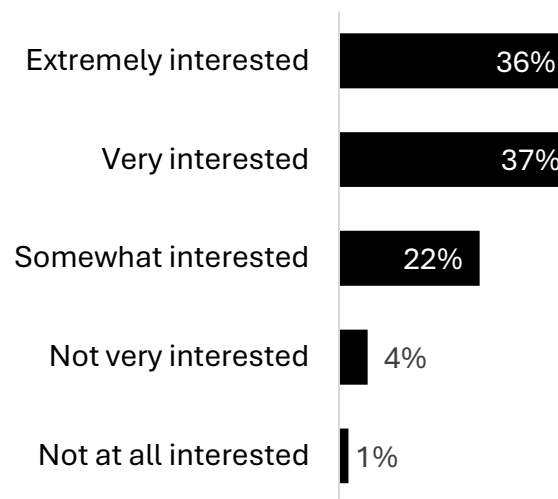
Though New Zealand is not a top-of-mind cycling destination in the North American market, it is highly appealing to the North American market as a destination for cycling.

1% of respondents mentioned New Zealand unaided
18% associated it with cycling when prompted

APPEAL OF NEW ZEALAND AS A VACATION DESTINATION



INTEREST IN VISITING NEW ZEALAND FOR A NZCT EXPERIENCE



THE IDEAL EXPERIENCE

More than two-thirds of the market favour a fully- or partially-guided cycle tourism experience.

TYPE OF EXPERIENCE



33%

A few different
cycle trails



20%

Themed cycle
routes

LEVEL OF SUPPORT



32%

Full guided tour

36% Partial support

16% Independent trip

14% Custom support

CYCLING COMPANIONS



29% Partner (only)



22% Solo



20% Friends

TRAIL GRADE

Grade 1 **26%**

Grade 2 **51%**

Grade 3 **42%**

Grade 4 **15%**

Grade 5 **4%**

LENGTH OF EXPERIENCE

Half day **35%**

Full day **27%**

2-3 days **43%**

4+ days **22%**

DAILY CYCLING HOURS



53% would prefer to cycle
between 2 – 4 hours a day

27% would prefer to cycle
between 4 – 6 hours a day

TYPE OF EXPERIENCE



43%

A few different
cycle trails



24%

Themed cycle
routes

ACCOMMODATION



45% Hotels



30% Rentals (Airbnb)



27% B&Bs



26% Camping

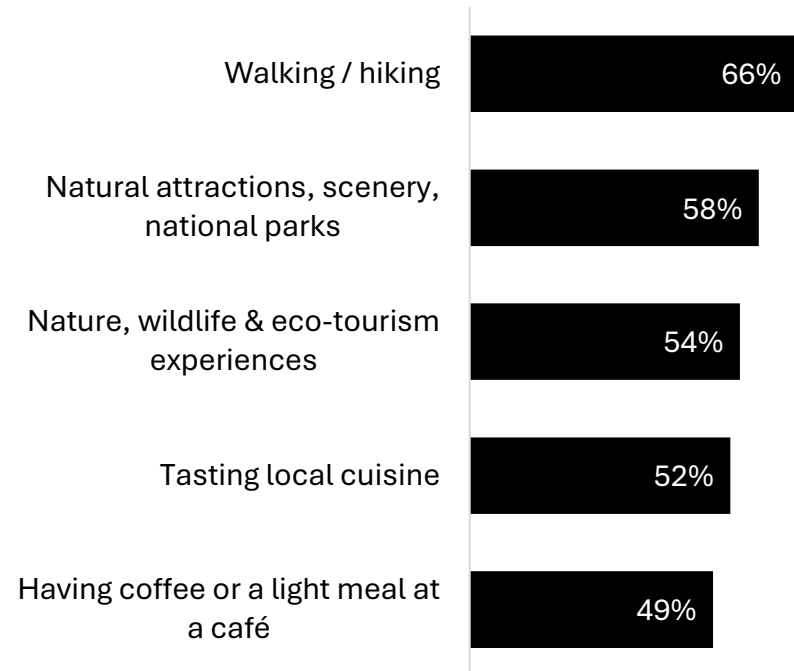
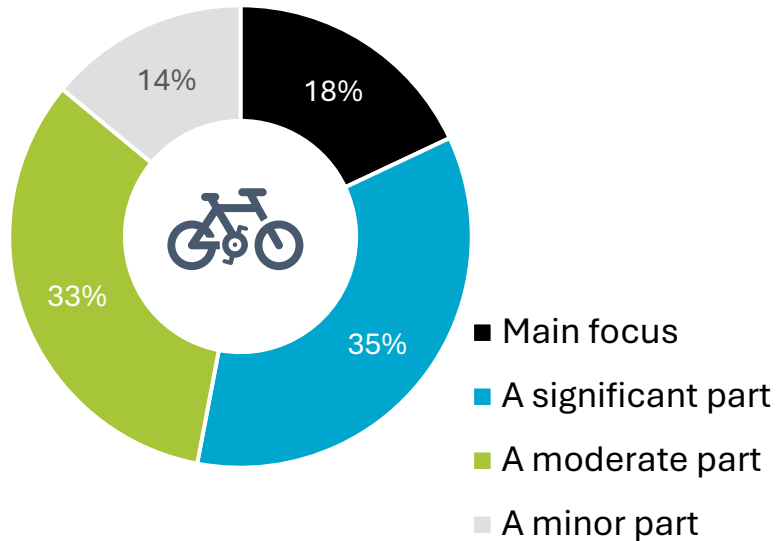


21% Lodges

CYCLING VS. OTHER ACTIVITIES

More than half of respondents anticipated that cycling would be the main focus or a significant part of a cycle tourism trip in New Zealand.

Two-thirds of respondents would also enjoy walking or hiking, with other popular activities being visiting natural attractions, nature/wildlife experiences, and experiences of local cuisine.



PREFERRED TIME OF YEAR

The preferred travel season for an NZCT experience is mid-spring to mid-autumn (excluding December) – indicating that cycle tourism offers great potential for development of the North American market in the shoulder seasons.



January (Summer)

27%

February (Summer)

31%

March (Autumn)

31%



April (Autumn)

31%

May (Autumn)

24%

June (Winter)

10%



July (Winter)

8%

August (Winter)

8%

September (Spring)

26%

October (Spring)

32%

November (Spring)

29%



December (Summer)

22%



Ngā Haerenga
NEW ZEALAND CYCLE TRAILS

angus
& ASSOCIATES