

Travel Patterns of Destination Mountain Bikers

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Background

According to recreational usage statistics, there are approximately 10 million mountain bikers in the U.S. Little research has been done to understand what proportion of the mountain biking population travels outside their local area to partake in the sport and what factors influence destination choice. The only relevant travel statistic found was a study by the Travel Industry Association of America, which showed that mountain biking was the fourth most popular adventure activity among all U.S. adventure travelers in 1997.

In the spring of 2003, the International Mountain Bicycling Association (IMBA) cooperated with Ride the Shore Tours Inc. to survey IMBA members in order to gain an understanding of mountain bikers' travel patterns. A geographically diverse sample of U.S. IMBA members received an email from the organization inviting them to participate in an online survey, hosted on the Ride the Shore website (www.ridetheshore.com). Approximately 1,400 IMBA members were invited to participate. A total of 464 responses were received by the survey deadline, a response rate of 33%.

It is important to keep in mind that results are representative of IMBA members only and do not necessarily reflect travel patterns of the larger population of American mountain bikers.

Survey Highlights

Riding Habits

Survey respondents were asked a series of questions about their riding habits during the 2002 season:

- 62% of respondents reported mountain biking 40+ times during the 2002 season and can be considered active mountain bikers.
- 89% had been cross-country riding in 2002, while 65% had participated in dirt road or rail-trail riding, 23% had been freeriding, 18% went downhill, and 14% did trials riding.
- Respondents listed being outdoors/scenery, exercise, and challenge as their primary reasons for enjoying mountain biking.
- The top mountain biking magazines read in the past 12 months were Mountain Bike (read by 67% of respondents), Bike (62%), Dirt Rag (53%), and Mountain Bike Action (38%).

Mountain Biking Travel Patterns

Respondents were asked a number of questions about mountain biking specific trips of one or more nights. Those who have taken a mountain biking-related trip are identified as destination mountain bikers in the following discussion.

- 80% of survey respondents have taken at least one trip of one or more nights specifically to go mountain biking, which suggests mountain biking-related tourism is significant.
- The top mountain biking destinations among destination mountain bikers are:

	% of Respondents Visiting
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Moab, UT	32%
Tsali, NC	7%
Lake Tahoe, CA	6%
Fruita, CO	6%
Crested Butte, CO	5%
Mammoth, CA	5%

- These results confirm Moab, Utah's dominance of mountain biking related travel. Nearly half of destination mountain bikers residing in the Western U.S. have visited Moab. The results also show that Moab has considerable appeal among the larger mountain biking market, with approximately one fifth of destination mountain bikers living in other regions of the US having visited Moab. These results confirm that mountain bikers will travel considerable distance to experience world-class mountain biking (Moab is located in Southeastern Utah, a 4 hour drive from Salt Lake City).
- The average length of all destination mountain biking trips was 4.6 nights.
- 3.8 days on average were spent mountain biking, suggesting that destination mountain bikers rarely partake in other activities on mountain biking specific trips.
- Destination mountain bikers seldom book a mountain biking trip through a tour operator (just 8% of respondents had used a tour operator previously).
- In terms of planning and purchasing a mountain bike trip, nearly half of respondents (48%) said they tend to plan trips themselves before they leave home.
- 7% had a rented a bike on a mountain biking trip, suggesting that almost all destination mountain bikers prefer to bring their own bikes.
- 40% of respondents take mountain biking trips with friends and family, while 31% travel with friends only.
- 45% prefer to camp on mountain biking trips, while 40% favor small lodges/inns, and 8% prefer hotels.

Factors Influencing Destination Choice

Destination mountain bikers were asked how the following factors influence their choice of a multi-day mountain biking destination. Respondents used a 5-point scale with 5 being "very important" and 1 being "not important". Average ratings were calculated for each factor.

	Importance Rating (out of 5)
Reputation of destination	4.0
Recommendation from a friend/relative	4.0
Internet research	3.4
Mountain biking magazine article	3.2
Mountain bike race or event	3.2
Guidebook	3.1
Bike club	3.1
Article in a general outdoor magazine	2.7
Brochure	2.6
Travel agent	1.6

The results clearly show the power of a destination's reputation and word of mouth recommendations in influencing destination choice. Internet research, articles in mountain biking publications, and mountain biking events have a moderate amount of influence. It is interesting to note that travel agents have a negligible role in influencing mountain bikers' choice of destination.

Using the same 5-point scale, destination mountain bikers were also asked to evaluate the importance of the following features in making a destination appealing for a multi-day mountain biking trip.

	Importance Rating (out of 5)

Variety/difficulty of terrain	4.5
Number of trails	4.4
Scenery	4.3
Reputation as a mountain biking destination	3.9
Cost of trip	3.7
Weather	3.7
Strong mountain biking community/culture	3.5
Ease of getting to the destination	3.4
Other facilities (bike shops, accommodation etc)	3.3
Availability of other outdoor activities	3.1

The results show that destination mountain bikers place a great deal of importance on the variety/difficulty of terrain, the number of trails, and scenery. Destinations looking to attract mountain bikers would obviously be wise to emphasize these attributes in their marketing materials. Destination reputation, trip cost, and weather play a fairly important role in making a destination appealing for mountain bikers. The low importance attached to the availability of other outdoor activities at a destination (3.1 rating) confirms that mountain bikers tend to focus on a single sport while on mountain biking-related trips.

Respondent Demographics

- 86% of survey respondents were male
- The average age of respondents was 38 years old
- 50% have household incomes of \$75,000+ (US dollars)
- 35% are married/cohabitating with children at home, while 34% are single, and 31% are married/cohabitating without children in the home.
- Approximately half (49% of respondents) categorized themselves as advanced intermediate riders
- Respondents own 2.2 mountain bikes on average
- Consistent with IMBA membership data, the majority of respondents reside in the Western US (20% live in California and 12% in Colorado). The Northeast accounted for a substantial number of respondents (with 6% of respondents residing in New York, 5% in Pennsylvania and Virginia respectively). Four percent of respondents were from North Carolina, Texas and Georgia respectively.

Since completing this market research, Donna Green has launched Ride the Shore Tours Inc. (<http://www.ridetheshore.com>), which offers customized mountain biking trips to the North Shore, Squamish, and Whistler (British Columbia, Canada). Donna also has a market research consulting business specializing in tourism research. She can be reached at 1-888 301-BIKE (2453).

Survey Invitation

Dear IMBA Member,

Please take a few moments to complete a brief mountain biking tourism survey located at this address: <http://www.ridetheshore.com>

The survey is being conducted by Donna Green (Dgreen67@telus.net), a student at BCIT in Vancouver, Canada.

The results will be used to determine characteristics of mountain biking tourism. Key findings from the survey will be posted on IMBA's website and will provide valuable information for destinations and individuals interested in attracting mountain biking tourists.

Thanks for your time,

Pete Webber - IMBA membership director
1-888-442-4622

Mountain Biking Tourism Survey

(web version can be found at <http://www.ridetheshore.com/survey/>)

All individual responses will remain strictly anonymous and confidential. If you are not able to answer a question, please leave it blank.

1. How often did you go mountain biking during the 2002 season? (Select one)

Fewer than 10 times

10-19 times

20-29 times

30-39 times

More than 40 times

2. How would classify your mountain biking ability? (Select one)

Beginner

Intermediate

Advanced intermediate

Expert

3. What types of mountain biking did you participate in during 2002? (Check all that apply)

Dirt road or rail-trail mountain biking

Cross-country

Downhill

Freeriding

Trials

4. How many mountain bikes do you own? _____

5. What do you enjoy about mountain biking? (Check all that apply)

Challenge

Being outdoors/scenery

Exercise

Social aspect/camaraderie

Other (specify) _____

6. What mountain biking magazines/ezines have you read in the past 12 months? (Check all that apply)

Bike

Mountain Bike

Mountain Biking

Mountain Bike Action

Dirt Rag

Mtn Bike Review

Gearhead

Mtbonline

NSMB

Pink Bike

7. Have you ever taken an overnight trip (1+ nights away from home) specifically to go mountain biking?

Yes

No SKIP to Q 13

8. If yes, please complete the following chart to describe your three most recent mountain biking specific trips

Destination and year

of nights away

of days spent mountain biking Outdoor activities other than mountain biking on this trip

Did you rent a bike on this trip? (YES/NO)

Was any part of this trip organized by a tour operator? (YES/NO)

9. How important are the following factors in influencing your choice of a destination for a multi-day mountain biking trip?

Not Important Very Important Not Applicable

Reputation of destination 1 2 3 4 5 NA

Recommendation from friend/relative 1 2 3 4 5 NA

Internet research 1 2 3 4 5 NA

Article in a mountain biking magazine 1 2 3 4 5 NA

Article in a general outdoor magazine 1 2 3 4 5 NA

(eg. Outside)

Brochure 1 2 3 4 5 NA

Guidebook 1 2 3 4 5 NA

Bike club 1 2 3 4 5 NA

Travel agent 1 2 3 4 5 NA

Mountain bike race or event 1 2 3 4 5 NA

Anything

else? _____

10. How important are the following features in making a destination appealing for a multi-day mountain biking trip?

Not Important Very Important Not Applicable

Number of trails 1 2 3 4 5 NA

Variety/difficulty of terrain 1 2 3 4 5 NA

Reputation as a mountain biking destination 1 2 3 4 5 NA

Strong mountain biking community/culture 1 2 3 4 5 NA

Scenery 1 2 3 4 5 NA

Availability of other outdoor activities 1 2 3 4 5 NA

Other facilities (accommodation, restaurants, 1 2 3 4 5 NA

bike shops)

Ease of getting to destination 1 2 3 4 5 NA

Weather 1 2 3 4 5 NA

Cost of trip 1 2 3 4 5 NA

Anything

else? _____

11. Who do you typically take mountain bike vacations with? (Select one)

Alone

Spouse/partner only

Family only (spouse and children)

Friends only

Friends and family

12. What type of accommodation do you prefer on mountain biking trips? (Select one)

Hotels

Small lodges/inns/motels

Bed & breakfasts

Camping

13. Vancouver, BC, Canada's North Shore has a reputation as the birthplace of freeriding and is renowned for its trails. How interested are you in taking a mountain bike trip to the North Shore?

Very interested

Somewhat interested

Not very interested

Not at all interested

Comments _____

14. Squamish, a small town approximately 45 minutes from the North Shore on the way to Whistler, offers 80+ trails (mix of cross-country, freeriding, and downhill trails). Whistler has a bike park with downhill trails in addition to numerous cross-country trails. How interested would you be in taking a multi-day mountain biking trip to BC that combines riding on the North Shore, Squamish and Whistler?

Very interested

Somewhat interested

Not very interested

Not at all interested

Comments _____

15. If you expressed interest in a trip to the North Shore, Squamish, or Whistler, how would prefer to plan/purchase such a trip? (Select one)

As a multi-day package (set rides each day led by a guide; price includes accommodation, transportation, guiding, and food, with optional bike rentals)

As a customized package (accommodation, vehicle rental, maps arranged, but no set riding itinerary - guides and bike rentals are optional)

I'd plan it myself before travelling to the destination

I'd plan it myself when I'm at the destination

Through a bike club

Unsure

Comments _____

The following questions will allow us to segment your responses. Please be assured that the data is being used for market research purposes only and your confidentiality will be protected.

16. In what year were you born? _____

17. Gender

Male

Female

18. What's your martial status?

Single

Married/cohabitating with children at home

Married/cohabitating with no children living in the home

19. Residence _____ (city and state)

20. Which of the following best describes your household income (before taxes) in 2002?

Under \$25,000

\$25,000-\$49,000

\$50,000-\$74,999

\$75,000-\$99,999

\$100,000+