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

Tourism Bikenomics session
Velo-City, June 14th, 2017

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University of Quebec in Montreal
Presentation Plan

• Context and Methodology
• Sociodemographic portrait of the tourist cyclist
• Tourism behaviors
• Conclusion
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Context and Methodology
Where is Quebec

Population: 8.3 million
Project partners
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
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.
Methodology

Samples

<table>
<thead>
<tr>
<th>Number of accommodations solicited</th>
<th>Number of accommodations that participated</th>
<th>Number of coupons distributed</th>
</tr>
</thead>
<tbody>
<tr>
<td>203</td>
<td>131</td>
<td>7,415</td>
</tr>
</tbody>
</table>

Répartition des coupons récoltés

<table>
<thead>
<tr>
<th>Region</th>
<th>Number</th>
</tr>
</thead>
<tbody>
<tr>
<td>Bas-Saint-Laurent</td>
<td>147</td>
</tr>
<tr>
<td>Cantons-de-l’Est</td>
<td>291</td>
</tr>
<tr>
<td>Centre-du-Québec</td>
<td>82</td>
</tr>
<tr>
<td>Chaudière-Appalaches</td>
<td>154</td>
</tr>
<tr>
<td>Gaspésie</td>
<td>52</td>
</tr>
<tr>
<td>Lanaudière</td>
<td>148</td>
</tr>
<tr>
<td>Laurentides</td>
<td>433</td>
</tr>
<tr>
<td>Mauricie</td>
<td>96</td>
</tr>
<tr>
<td>Montérégie</td>
<td>38</td>
</tr>
<tr>
<td>Montréal</td>
<td>10</td>
</tr>
<tr>
<td>Région de Québec</td>
<td>159</td>
</tr>
<tr>
<td>Outaouais</td>
<td>142</td>
</tr>
<tr>
<td>Saguenay–Lac-Saint-Jean</td>
<td>246</td>
</tr>
<tr>
<td>Total</td>
<td>1,998</td>
</tr>
</tbody>
</table>

Number of respondants: 585

Response rate: 29%

Survey conducted between October 7th and October 23th 2014
Methodology

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

- 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
Methodology

Respondants

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

- Distribution:
  - 32% from Bienvenue cyclistes! Database
  - 64% from Vélo Québec Database
  - 4% from Ontario and USA Database

N = 1,473
Methodology

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 established among respondents 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
Sociodemographic portrait of the tourist cyclist
Sociodemographic portrait

Age

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

- 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
Where do they come from

• 21% of bike tourists come from outside Quebec

• Distribution similar to the Quebec overall tourism pattern

N = 1998

Québec: 79%
Ontario: 9%
Other Canadian provinces: 3%
United-States: 7%
Europe: 2%
Elsewhere in the world: 0.3%
Tourism behaviors
## Tourism behaviors

### Length of the trips

<table>
<thead>
<tr>
<th></th>
<th>Québec</th>
<th>Outside Québec</th>
</tr>
</thead>
<tbody>
<tr>
<td>1 night</td>
<td>23%</td>
<td>5%</td>
</tr>
<tr>
<td>2 nights</td>
<td>26%</td>
<td>9%</td>
</tr>
<tr>
<td>3 nights</td>
<td>17%</td>
<td>13%</td>
</tr>
<tr>
<td>4 nights</td>
<td>10%</td>
<td>14%</td>
</tr>
<tr>
<td>5-6 nights</td>
<td>12%</td>
<td>17%</td>
</tr>
<tr>
<td>7 nights +</td>
<td>12%</td>
<td>42%</td>
</tr>
</tbody>
</table>

- **Québecers**: 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
Tourism behaviors

Tourism spending

<table>
<thead>
<tr>
<th>Segment</th>
<th>Average per stay</th>
<th>Average per day</th>
</tr>
</thead>
<tbody>
<tr>
<td>Quebec</td>
<td>554$</td>
<td>210$</td>
</tr>
<tr>
<td>Outside Quebec</td>
<td>1391$</td>
<td>243$</td>
</tr>
<tr>
<td>Used Route verte</td>
<td>736$</td>
<td>229$</td>
</tr>
<tr>
<td>Total average</td>
<td>676$</td>
<td>214$</td>
</tr>
</tbody>
</table>

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

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

- 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 inclined 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 2\textsuperscript{nd} in importance
## Tourism behaviors

### Tools used at destination

<table>
<thead>
<tr>
<th>Tool</th>
<th>Québec</th>
<th>Outside Québec</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Paper map of the regional cycle network</td>
<td>44%</td>
<td>56%</td>
<td>50%</td>
</tr>
<tr>
<td>Smartphone</td>
<td>30%</td>
<td>38%</td>
<td>36%</td>
</tr>
<tr>
<td>General map road of the region (paper format)</td>
<td>26%</td>
<td>35%</td>
<td>30%</td>
</tr>
<tr>
<td>Bike tourism guide or brochure</td>
<td>22%</td>
<td>41%</td>
<td>31%</td>
</tr>
<tr>
<td>Regional tourist guide</td>
<td>22%</td>
<td>20%</td>
<td>21%</td>
</tr>
<tr>
<td>Bike GPS</td>
<td>15%</td>
<td>18%</td>
<td>16%</td>
</tr>
<tr>
<td>Tablet</td>
<td>12%</td>
<td>14%</td>
<td>13%</td>
</tr>
<tr>
<td>GPS</td>
<td>14%</td>
<td>9%</td>
<td>11%</td>
</tr>
<tr>
<td>None</td>
<td>13%</td>
<td>11%</td>
<td>12%</td>
</tr>
</tbody>
</table>

- 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

<table>
<thead>
<tr>
<th>Activity</th>
<th>Outside Quebec</th>
<th>Québec</th>
</tr>
</thead>
<tbody>
<tr>
<td>Purchase of local products</td>
<td>39%</td>
<td>49%</td>
</tr>
<tr>
<td>Fine cuisine</td>
<td>37%</td>
<td>49%</td>
</tr>
<tr>
<td>Visit of a natural park</td>
<td>34%</td>
<td>49%</td>
</tr>
<tr>
<td>Camping</td>
<td>31%</td>
<td>49%</td>
</tr>
<tr>
<td>Hiking</td>
<td>31%</td>
<td>49%</td>
</tr>
<tr>
<td>Wildlife observation</td>
<td>30%</td>
<td>49%</td>
</tr>
<tr>
<td>Cultural and patrimonial activities</td>
<td>26%</td>
<td>49%</td>
</tr>
<tr>
<td>Touristic routes</td>
<td>22%</td>
<td>48%</td>
</tr>
<tr>
<td>Nautical activity</td>
<td>20%</td>
<td>48%</td>
</tr>
<tr>
<td>Shopping</td>
<td>16%</td>
<td>48%</td>
</tr>
<tr>
<td>Cyclist event</td>
<td>16%</td>
<td>48%</td>
</tr>
<tr>
<td>Events (none-cyclist related)</td>
<td>9%</td>
<td>22%</td>
</tr>
<tr>
<td>Nightlife</td>
<td>9%</td>
<td>21%</td>
</tr>
<tr>
<td>Agrotourism</td>
<td>4%</td>
<td>10%</td>
</tr>
<tr>
<td>Spa</td>
<td>7%</td>
<td>10%</td>
</tr>
<tr>
<td>Mountain bike</td>
<td>4%</td>
<td>10%</td>
</tr>
</tbody>
</table>

- 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?

- 72% No
- 17% Yes, partially
- 11% Yes, totally

- 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

<table>
<thead>
<tr>
<th></th>
<th>Québec</th>
<th>Outside Quebec</th>
</tr>
</thead>
<tbody>
<tr>
<td>Stays over 7 nights</td>
<td>0.9</td>
<td>1.2</td>
</tr>
<tr>
<td>Stays of 4 to 7 nights</td>
<td>0.9</td>
<td>1.3</td>
</tr>
<tr>
<td>Stays of 3 nights and less</td>
<td>2.3</td>
<td>2</td>
</tr>
</tbody>
</table>

Québec

Outside Quebec

27
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

Crédit photos : Vélo Québec – François Poirier, Didier Bertrand, Simon/L'État Brut
Thank you for listening
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