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Niagara Cycling Tourism Centre Research Project Executive Report

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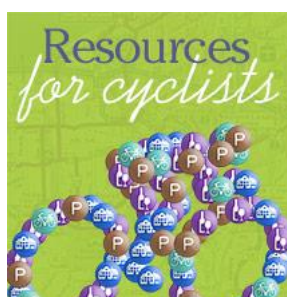
NIAGARA cycling tourism CENTRE
niagaracyclingtourism.com/ cyclinginniagara.bike
cycletourisminniagara.com/ niagaraenvelo.bike



Faculty of Applied Health Sciences
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PREAMBLE

Cycling Tourism is a booming tourism sector! A 2015 Ontario By Bike report, titled [*From Niche to Now: a report on the state of Ontario's cycling tourism sector*](#), stated cycling events have a significant economic impact in hosting regions. The report offers robust information about cycling tourists – their demographics, ride and travel preferences, bike trips and supplemental activities. But while understanding the cycling tourist is important, what about the other side of the equation? How do businesses see this burgeoning tourism sector?

The Niagara Cycling Tourism Centre is funded by Venture Niagara Community Futures Development Corporation (Venture Niagara), which provides financing to small businesses and carries out economic development projects in the Niagara Region. One strategy to stimulate the local economy is through tourism, namely cycling tourism.

The Niagara Cycling Tourism Centre is dedicated to providing extensive resources to visitors looking to explore Niagara by bike. The Centre helps cycling enthusiasts find route and trail maps, cycle-friendly destinations, services and travel information within the Niagara Region. The Centre hosted the Niagara Cycling Tourism Summit in February, 2016. The event sought to strengthen cycling tourism and support business development in Niagara.

To that end, the purpose of the Niagara Cycling Tourism Centre Research Project was ***to better understand cycling tourism in Niagara from the perspective of business stakeholders***. By being more informed about business needs related to cycling tourism the Niagara Cycling Tourism Centre can enhance regional products, and services, and increase communication and coordination on initiatives that serve Niagara's cycling tourism sector.

RESEARCH BACKGROUND

This study utilized a qualitative survey design. The Niagara Cycling Tourism Centre database (n=186) provided the sample set for this study. The database consists of five business categories: (1) Business Improvement Association, (2) Accommodation, (3) Commercial Services and Retail, (4) Restaurant, and (5) Wine & Beer. The response rate was 29% (n=54).

Data were collected using telephone and online surveys. A total of 15 open and closed ended questions were asked to business leaders (refer to Appendix A). Response frequencies and key themes were analyzed. Comments were tallied for frequencies, and either recorded verbatim from the interview or captured from the online responses.

Table 1 – Sample Size According to Categories

Category	Sample Size (n)
Business Improvement Association	9
Accommodation	25
Commercial Services and Retail	7
Restaurant	3
Wine and Beer	10
Total Sample	54

Note: The nature of day-to-day business meant it was very difficult to contact participants in the Restaurant category.

ACKNOWLEDGEMENTS

The Niagara Cycling Tourism Centre acknowledges the contribution of a number of organizations and individuals who played an important role in the completion of this study.

First, the time and interest of each business respondent is greatly appreciated. Your participation in this study enables the Niagara Cycling Tourism Centre to better understand cycling tourism in Niagara, and in turn, help Niagara businesses capitalize on the economic opportunities of this rapidly expanding tourism sector.

Venture Niagara provides funds to the Niagara Cycling Tourism Centre and its support made it possible to conduct this research.

Staff at Venture Niagara and the Niagara Cycling Tourism Centre were involved throughout the research process. The guidance of Ms. Sue Morin, Business Development Manager, and Ms. Karine Whittingham, Community Economic Development Officer, was a valuable asset for the project.

Finally, members of the Centre of Sport Capacity at Brock University partnered with Venture Niagara and Niagara Cycling Tourism Centre to conduct the research. The project team was comprised of Project Lead Dr. Julie Stevens (Ph.D), Associate Professor, Department of Sport Management and Research Assistant Mr. Mitch Cuming (BSM), Sport Management Graduate Program, Faculty of Applied Health Sciences.



A. Business Growth and Cycling Tourism

Key Finding - “Readiness for Growth”

In relation to business growth, 90% of respondents (49/54) identified cycling as a valuable market for their business. Further, 78% of business respondents (42/54) identified themselves as either seeing growth or interested in seeing more growth from the cycling market.

Figure 1: Responses for Cycling Market Importance and Growth for Each Category



Business Improvement Associations

- 100% (9/9) of BIA respondents identified cycling as a valuable market for their business;
- Additionally, 100% (9/9) of BIA respondents identified themselves as seeing growth and/or interested in growth from the cycling market.

Accommodation

- 92% (23/25) of Accommodation business respondents identified cycling as a valuable market for their business;
- Additionally, 88% (22/25) of Accommodation business respondents identified themselves as seeing growth and/or interested in growth from the cycling market;
- Only 12% (3/25) of Accommodation business respondents did not identify an interest in attracting more cyclists to their business (the same which did not identify cycling as a valuable market for their business).

Commercial Services and Retail

- 71% (5/7) of Commercial Services and Retail business respondents identified cycling as a valuable market for their business;
 - 60% of those businesses (3/5) identified themselves as seeing growth and/or interested in growth from the cycling market, while 40% (2/5) did not;
- 28% (2/7) of Commercial Services and Retail business respondents did not identify an interest in attracting more cyclists to their business.

Restaurant

- 100% (3/3) of Restaurant business respondents identified cycling as a valuable market for their business;
 - 100% of those businesses (3/3) identified themselves as seeing growth and/or interested in growth from the cycling market.

Wine & Beer

- 90% (9/10) of Wine & Beer business respondents identified cycling as a valuable market for their business;
 - 66% of those businesses (6/9) identified themselves as seeing growth and/or interested in growth from the cycling market, while 33% (3/9) did not;
- 10% (1/10) of Wine & Beer business respondents did not identify an interest in attracting more cyclists to their business.

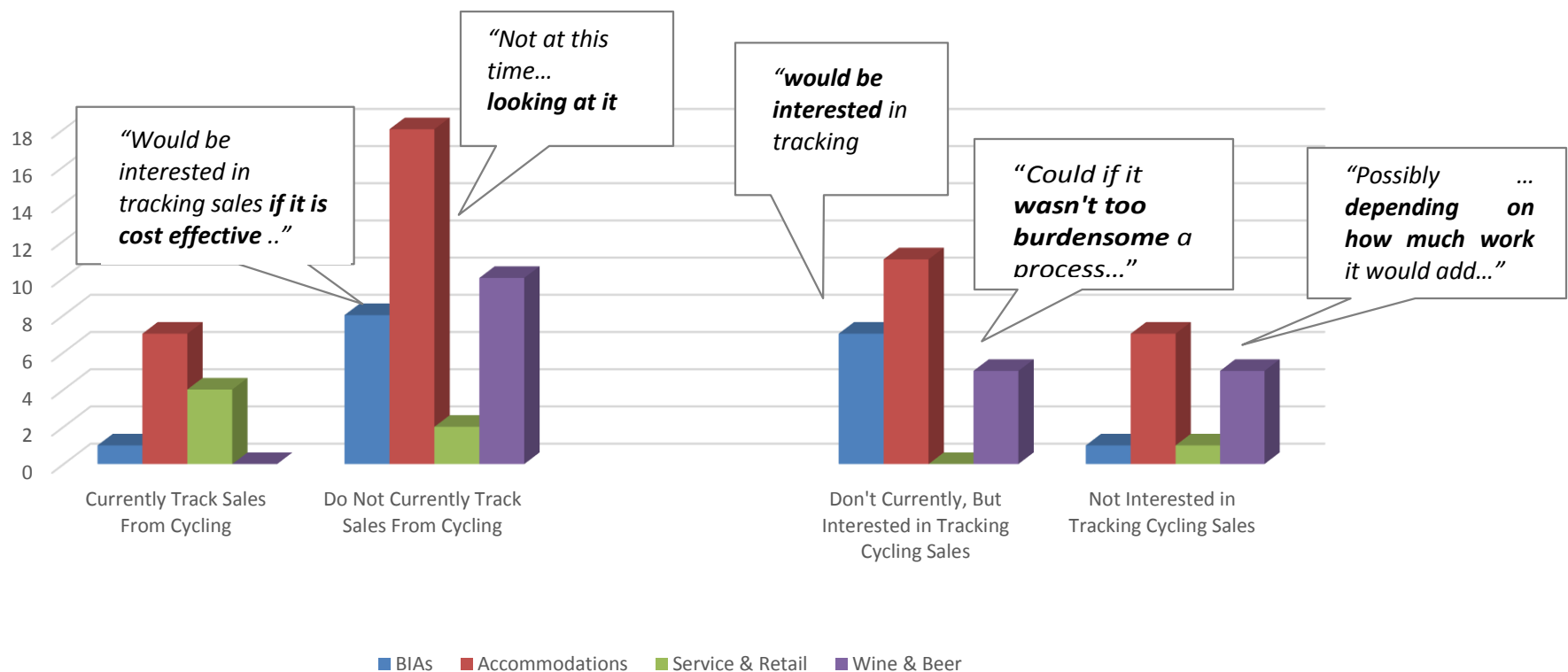


B. Business Sales and Cycling Tourism

Key Finding - A Desire to Sell

Overall, 24% (13/54) of respondents currently track sales from cycling. Among those who track sales, 38% (5/13) identified cycling increased sales for their business (though numbers were not provided). Finally, 61% (25/41) of respondents that do not currently track sales from cycling indicated they were open to doing so in the future.

Figure 2: Responses for Cycling Tourism Sales and Tracking



Business Improvement Association

- 89% (8/9) of BIA respondents did not identify tracking sales from cycling in any way; only 11% (1/9) did;
- The lone BIA respondent that identified 'currently tracking sales' could not provide a sales increase in percentage at the time of the phone survey;
- 87% (7/8) of BIA respondents that do not track cycling sales identified that they would be interested in doing so in the future; while 13% (1/8) were not interested in doing so in the future.

Accommodation

- 72% (18/25) of Accommodation respondents did not identify tracking sales from cycling in any way; 28% (7/25) did;
- 61% (11/18) of Accommodation respondent that do not currently track cycling sales expressed an interest in doing so in the future;
- 43% (3/7) of businesses that currently track sales from cycling claimed that they've seen sales increase from cyclists specifically (though no concrete numbers were provided).

Commercial Services and Retail

- 66% (4/6) of Commercial Services and Retail business respondents identified that they currently track sales from cycling;
- The lone business that does not currently track sales did not express interest in doing so in the future;
- One respondent skipped this section of questions.

Restaurant

- 33% (1/3) of Restaurant business respondents do not currently track sales from cycling;
- 1/3 (33%) of Restaurant business respondent identified it would be interested in tracking cycling sales if a proper system was put in place.

Wine & Beer

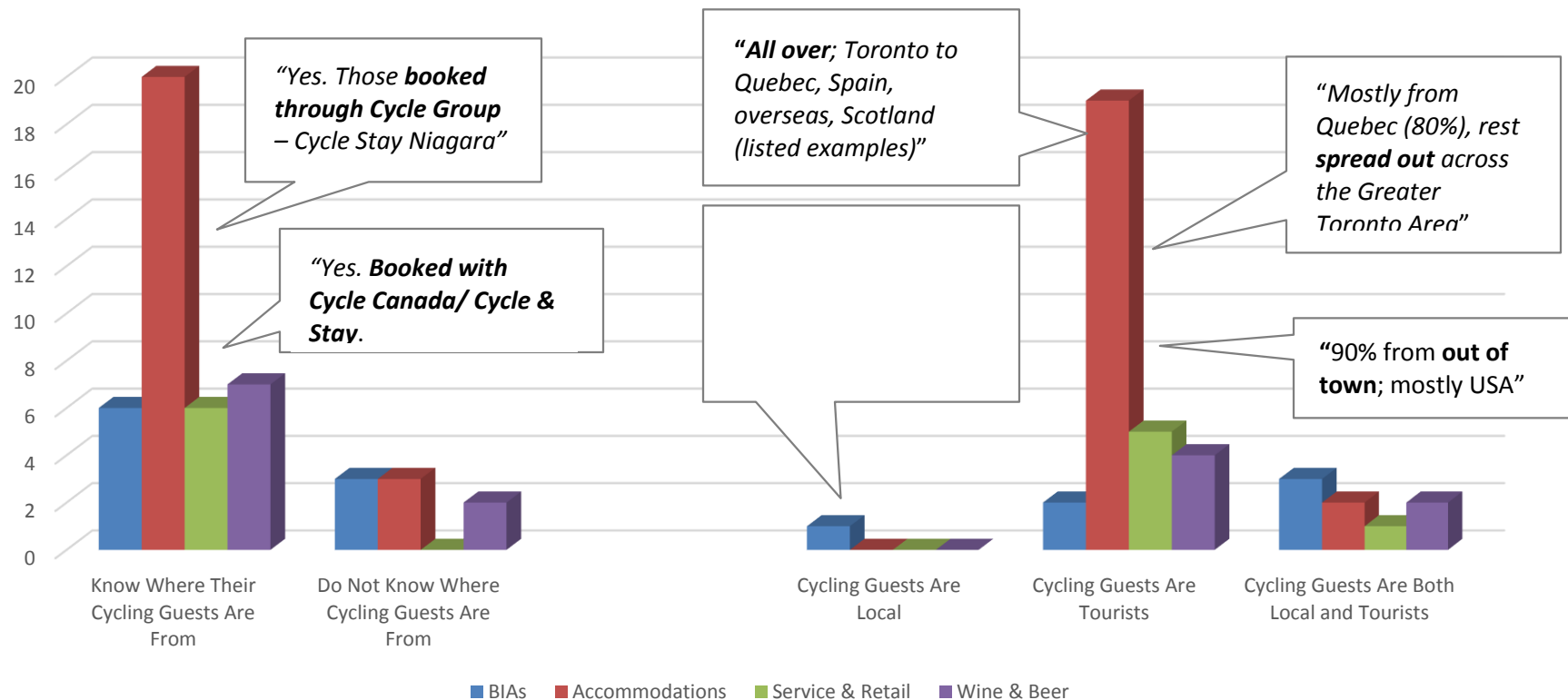
- None of the Wine & Beer business respondents currently track sales from cycling.
- 50% (5/10) of those businesses expressed an interest in tracking cycling sales in the future.

C. Cycling Guests and Cycling Tourism

Key Finding - *Tracking is Tough*

Overall, 82% (41/50) of respondents indicated they knew where their cycling guests were from. Of these businesses, 98% (40/41) identified their cycling guests as tourists.

Figure 3: Responses for Cycling Tourism Sales and Tracking



Business Improvement Associations

- 66% (6/9) of BIA respondents identified that they know where their cycling guests are from;
- The remaining 33% (3/9) of BIA respondents that did not know where their guests were from were unsure if they were local or tourists;
- 50% (3/6) of BIA respondents who knew where their cycling guests were from identified them as both local and tourists, 17% (1/6) identified cycling guests as local, and 33% (2/6) identified guests as tourists.

Accommodation

- 87% (20/23) of Accommodation business respondents identified that they know where their cycling guests are from;
- 83% (19/23) of Accommodation business respondents identified their cycling guests as tourists, while 8% (2/23) identified their guests as both local and tourists... only one business was not sure where their guests were from;
- One respondent skipped this section of questions.
- Of the businesses that knew where their cycling guests were from, Ontario* (13/20), Quebec (9/20), USA (6/20), and Toronto specifically (5/20), were the most cited areas of where cycling guests come from;
 - *includes any time a specific city in Ontario was mentioned in addition to the province.

Commercial Services and Retail

- 100% (6/6) of Commercial Services and Retail business respondents knew where their cycling guests are from;
- All Commercial Services and Retail business respondents recognized that their cycling guests are tourists (83% solely, with 17% as both tourists and locals).
- One respondent skipped this section of questions.

Restaurant

- All Restaurant business respondents knew where their cycling guests were from; two identifying them as tourists, the other as local.

Wine & Beer

- 77% (7/9) of Wine & Beer business respondents knew where their cycling guests were from;
- 86% (6/7) of those businesses identified their cycling guests as tourists (67% tourists, 33% both tourists and locals) while one business identified their cycling guests as local.
- One respondent skipped this section of questions.

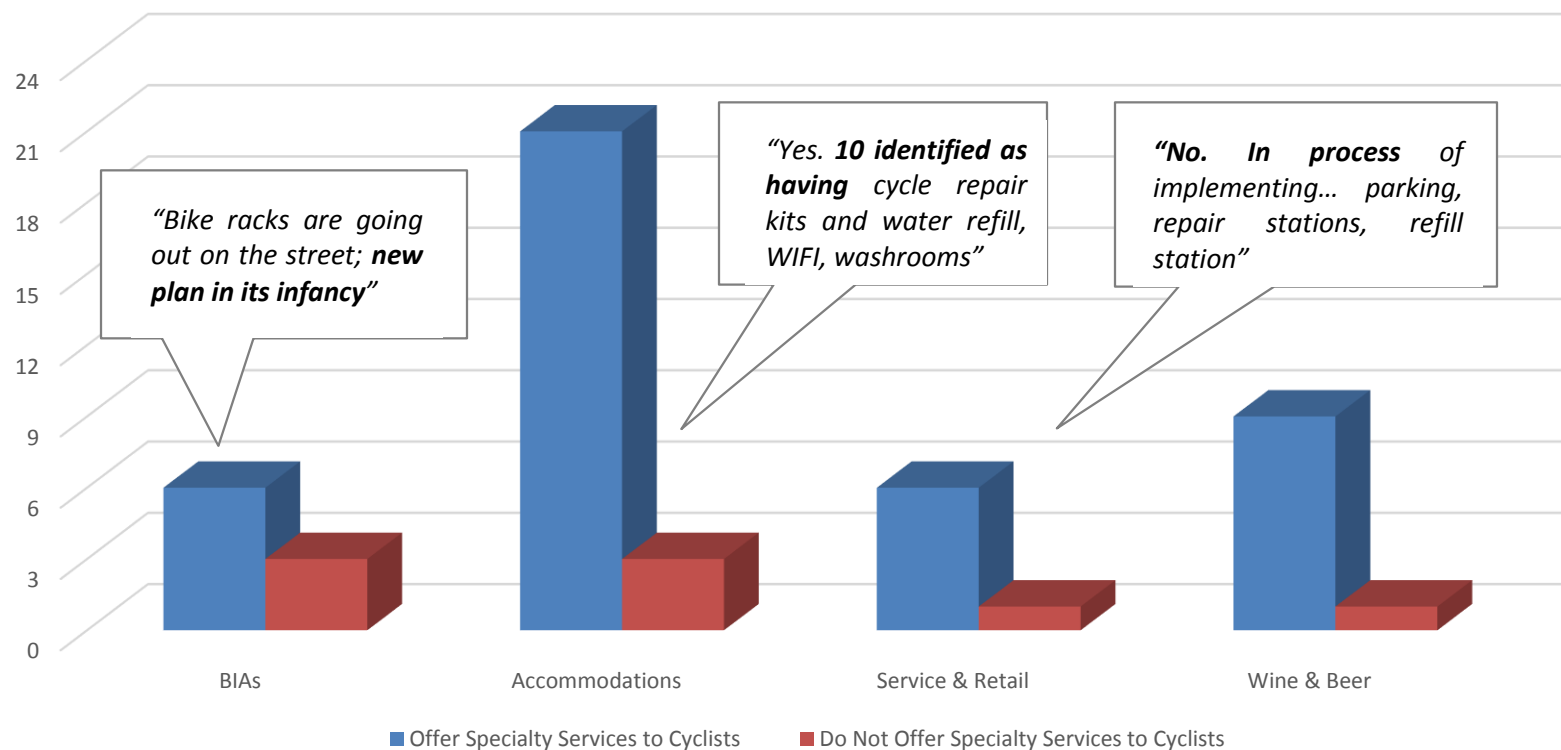


D. Specialty Services and Cycling Tourism

Key Finding - *Specialty Service over Transfer Service*

The results demonstrate that 67% (34/51) of respondents do not (currently) offer luggage or purchase transfer services to cyclists, which also means one third of the businesses (17/51) do offer this service. More generally, 85% (45/53) of businesses offer specialty services to cyclists.

Figure 4: Responses for Specialty and Transfer Services for Cyclists



Business Improvement Associations

- 78% (7/9) of BIA respondents do not currently identify themselves (or their members) as offering luggage or purchase transportation for cyclists;
- 66% (6/9) of BIA respondents currently offer specialty services to cyclists of some kind.

Accommodation

- Only 27% (6/22) of Accommodation business respondents offer luggage or purchase transfer services to cyclists; the other 73% (16/22) as a majority do not;
 - Several of those Accommodation business respondents noted that cyclists are usually prepared with their own transportation / arrangements for purchase transfer;
 - Two respondents skipped this question.
- 87.5% (21/24) of Accommodation business respondents identified themselves as offering specialty services to cyclists.

Commercial Services and Retail

- 86% (6/7) of Commercial Services and Retail business respondents do not currently transfer luggage or other purchases cyclists make;
- 86% (6/7) of Commercial Services and Retail business respondents identified themselves as offering specialty services to cyclists.

Restaurant

- All Restaurant business respondents do not transfer luggage or purchases cyclists make;
- All Restaurant business respondents offer specialty services to cyclists (particularly water refill and bike racks).

Wine & Beer

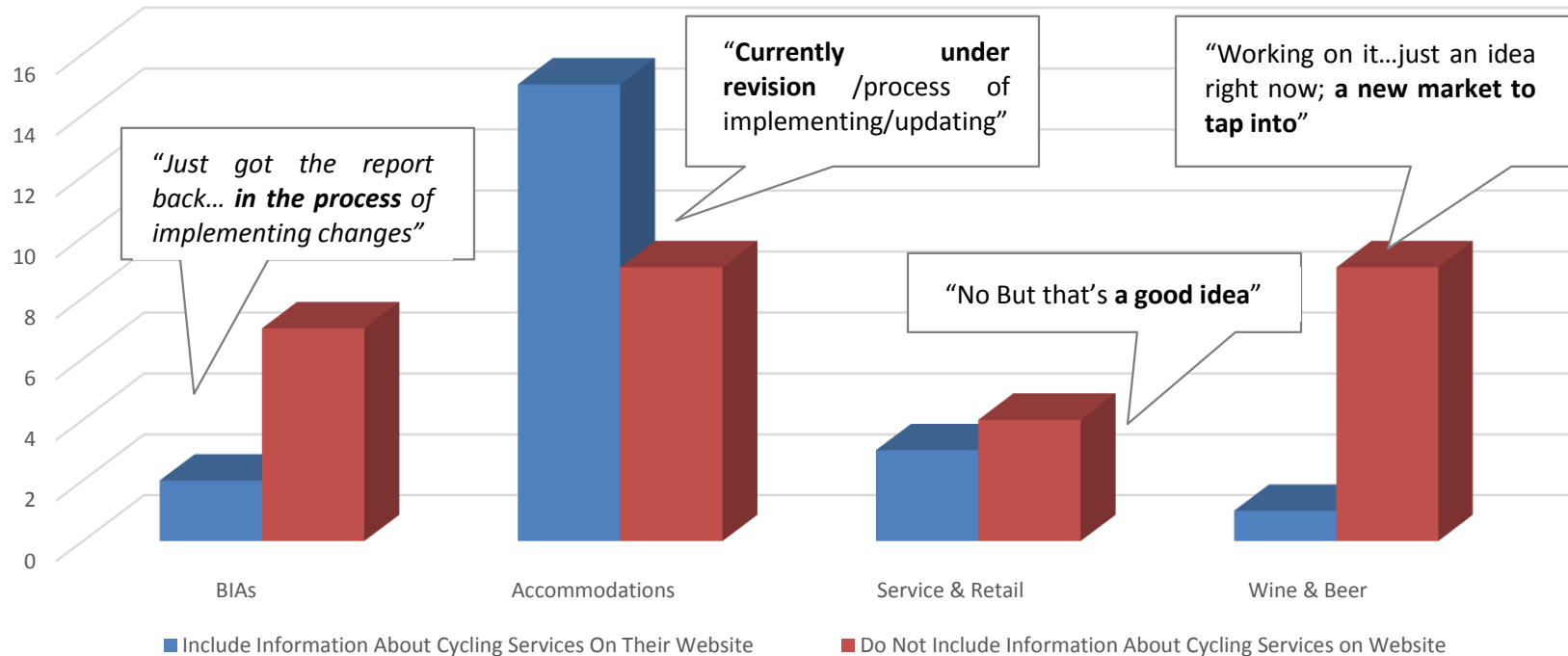
- 80% (8/10) of Wine & Beer business respondents identified themselves as offering to transfer of luggage or other purchases cyclists make;
- 90% (9/10) of Wine & Beer business respondents identified themselves as offering specialty services to cyclists (particularly bike racks; 100%).

E. Web Services and Cycling Tourism

Key Finding - *Limited WWW Exposure*

Less than half, or 41.5% (22/53) of respondents currently include information about cycling services they offer on their business website. In terms of internet exposure for their business, 72% (38/53) of respondents indicated they are not currently linked with the Niagara Cycling Tourism Centre.

Figure 5: Responses Regarding Web Services for Cyclists



Business Improvement Associations

- Only 28% (2/9) of BIA respondents currently include information about cycling services on their website; the remaining 72% (7/9) do not;
 - This question seemed to spark an interest in doing so however; many noted that it would be a good idea to include;
- 66% (6/9) of BIA respondents are not currently linked with the Niagara Cycling Tourism Centre.

Accommodation

- 62.5% (15/24) of Accommodation business respondents identified that their websites include information about the cycling services they provide;
- 38% (9/24) of Accommodation business respondents are currently linked with the Niagara Cycling Tourism Centre; the majority (62%; 15/24) are not.

Commercial Services and Retail

- 43% (3/7) of Commercial Services and Retail business respondents currently have information about the cycling services they provided on their website;
- Only 14% (1/7) of Commercial Services and Retail business respondents are currently linked with the Niagara Cycling Tourism Centre.

Restaurant

- One Restaurant (33%) business respondent includes cycling information on their website;

Wine & Beer

- Only 1 (10%) of Wine & Beer business respondent includes information about the cycling services it provides on its website; the majority 90% (9/10) do not;
- Only 2 (20%) of Wine & Beer business respondent are currently linked with the Niagara Cycling Tourism Centre.

F. Business Challenges and Cycling Tourism

Key Finding – Infrastructure is Key

Table 2: Frequency of Themes Related to Cycling Tourism Business Challenges

	Frequency
▪ Need bike lanes / better bike lanes	12
▪ Need more bike racks / bike parking	7
▪ Secure storage for bicycles is important	8
▪ Raise awareness of safety issues for cyclists	4
▪ Need to connect more cycling routes together	9
▪ Need cycle repair stations	2
▪ Need better signage to direct cyclists	2
▪ Raise cycling awareness/education with public	1
▪ Difficult for guests to carry/transport products	6

*"I think that probably the biggest challenge would be **being able to get their wine to them** so that they feel comfortable to purchase."*

Business Quotes

*"That's a very good question because we do have a challenge. See our property is on Lundy's Lane, so, Lundy's Lane is a very busy road as you may or may not know... and **if we were able to have some type of a cycling lane on Lundy's Lane that would be great.**"*

*"One of the problems we have on Lundy's Lane is that **we've been fighting very hard to get bike lanes on Lundy's Lane; fighting very hard for the Millennium Trail to go through from Lundy's Lane and the final parts be connected to the Niagara waterfront trail... and also, hoping that the other end will be hooked up into a potential east-west corridor for the region...**"*

Table 3: Frequency of Themes Related to Cycling Tourism Business Challenges According to Business Category

	Business Improvement Association	Accommodation	Commercial Services & Retail	Restaurant	Wine & Beer
▪ Need for bike lanes / better bike lanes	9	2			1
▪ Need for more bike racks / bike parking	5	1		1	
▪ Secure storage for bicycles	1	7			
▪ Need cycle repair stations					
▪ Raise awareness of safety issues for cyclists	1	2	1	1	1
▪ Need to connect more cycling routes together	7				3
▪ Need better signage to direct cyclists	1	1			
▪ Raise cycling awareness/educating the general public about cycling	1				



G. Business Feedback about Cycling Tourism

Table 4: Frequency of Themes Related to Open Feedback about Cycling Tourism

	Frequency
▪ Need bike lanes/better bike lanes	2
▪ Need more bike racks / bike parking	2
▪ Secure storage for bicycles is important	3
▪ Raise awareness of safety issues for cyclists	4
▪ Need to connect more cycling routes together	3
▪ Need better signage to direct cyclists	4
▪ Recognize awareness of growth/opportunity from the cycling market	18
▪ Need maps/guides for cyclists in the area	5
▪ Raise cycling awareness/education with public	5

Table 5: Frequency of Themes Related to Open Feedback about Cycling Tourism According to Business Category

	Accommodation	Commercial Services & Retail	Restaurant	Wine & Beer
▪ Need bike lanes/better bike lanes	2	2		
▪ Need more bike racks / bike parking	2			
▪ Secure storage for bicycles is important	2	1		
▪ Raise awareness of safety issues for cyclists		3		1
▪ Need to connect more cycling routes together	2			1
▪ Need better signage to direct cyclists	3			1
▪ Recognize awareness of growth/opportunity from the cycling market	14	1	1	2
▪ Need maps/guides for cyclists in the area				5
▪ Raise cycling awareness/education with public	3	2		



H. Key Themes

Readiness for Growth



Businesses recognize cycling is a valuable tourism sector and express an interest in the opportunities the new market affords.

A Desire to Sell



Nearly two thirds (63.2%) of the businesses currently track or want to track cycling tourism sales.

Tracking is Tough



Accommodation and Cycling Service businesses know where the cyclist come from, but it is too difficult for all other business categories.

Specialty over Transfer



A high majority of businesses offer specialty services but less than a third offer luggage transfer.

Limited WWW



Only half of the respondents advertise cycling services on the web and only one third are linked to the Niagara Cycling Tourism Centre.

Infrastructure is Key



A lack of infrastructure (bike routes, lanes, racks, signage, storage, parking, repair stations) was a key challenge facing businesses looking to capture cycling tourism market.

Spread the Word



Businesses want to see more maps and guides --- and awareness!



I. Action Items, Limitations and Conclusion

- Lobby for new infrastructure to provide 'on the street' help to business owners; spread the word through business and consumer outreach;

Enhance BIA Role



- Attract both the cycling consumer and the cycling tourist;

Develop a Bike-Friendly Initiative



- Offer workshops to help businesses design strategies, track sales and market their service to cycling consumers and tourists.

Build the Niagara Cycling Tourism Centre as a Resource Centre



Given this was a pilot study to gather general information on the business perspective of cycling tourism in Niagara, the sample size was small and selective. The nature of day-to-day business meant it was easy to contact some categories, such as BIA, Accommodation, and Cycling Services, but very difficult to contact other categories, namely Restaurant and Wine & Beer. Consequently, there is a very low response rate in some categories and further research, perhaps through focus groups or a targeted data collection effort may provide further data.

In conclusion, the results of the pilot study demonstrate a high level of interest in cycling tourism among the business respondents. There is a readiness among businesses to capitalize upon this growing tourism sector but help is needed in (1) infrastructure and (2) promotion.

