CYCLING AND MOUNTAIN BIKING IN SCOTLAND
VISITSCOTLAND EXECUTIVE SUMMARY

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BACKGROUND

The Cycling and Mountain Biking Research was carried out in May-July 2005 amongst UK consumers with an interest in cycling during their holiday and the cycling industry (retailers, tour operators, organisations). The main aim of the study was to gain a better understanding of the cycling and mountain biking market to Scotland. (For secondary objectives, please see appendix number one).

In the initial qualitative stage, consumers (specialist and leisure cyclists) and representatives of the cycling industry participated in depth interviews about cycling whilst on holiday in Scotland (49 depth interviews). In the second stage, a quantitative exercise was conducted (600 telephone interviews) amongst specialist cyclists and leisure cyclists.

Depending on their varying level of involvement with cycling / mountain biking during their holiday, consumers with an interest in cycling fall into two different groups, the leisure cyclists (cycling is just one activity while on holiday) and the specialist cyclists (their whole holiday revolves around cycling). The research was contracted to Scott Porter Research, an independent research agency.

KEY FINDINGS AND RECOMMENDATIONS

There were **clear distinctions identified between Leisure and Specialist cyclists** with respect to their **energy and enthusiasm for cycling** on a holiday / short break, the **relative importance of cycling** as an activity whilst on such a holiday and **whether cycling vs. the destination is the key driver** of their holiday selection.

Amongst the **Leisure segment**, destination is the key driver and cycling as an activity assumes varying degrees of importance (dependent upon the sub-segment). As such, the level of involvement requires a degree of product flexibility with regards to planning and provision of equipment (e.g. bike hire). For these reasons, there is a need to raise consideration of Scotland as a holiday destination, which offers cycling as part of the Scotland experience/package.

Amongst the **Specialist segment**, cycling is a very important element of their holiday and likely to be the key driver. Invariably, there is a greater degree of planning for their cycling holiday, including taking their own bikes. As such, the need amongst the Specialist market is to closely associate Scotland with cycling – as a top class destination offering challenge, variety and new experiences.

Within the broad Leisure and Specialist segments, a number of motivational and behavioural types were identified.

Of the 7 Leisure segments, 2 key segments offer the greatest potential for VisitScotland. The **'Fairweather Breakers'** (19% of the market) typify the new interest in cycling as an accessible leisure activity (as identified by those in the trade). As independents, they seek to spend some leisurely time with their friends and partners, driven by enjoying beautiful scenery and sights close at hand and with minimal effort. This is coupled with other indoor activities.

The **'Outdoor Aspirers'** (11% of the market) and may be viewed as an older version of the above segment, with more sophisticated, aspirational requirements.

The **'Recreationalists'** (34% of the market) were the largest of the Leisure segments. A family segment with a broad profile, they are motivated by spending leisurely time together as a family and enjoying a shared activity. Their requirements are also broad, as they will seek a range of activities to cater to the needs of each family member.

Of the 4 specialist segments identified, the largest was the **'Fanatics'** (41% of the market), which together with the **'Upgraders'** (27%), offer the greatest opportunity in this market overall. Primarily from the independent lifestage, they are keen independent cyclists seeking the complete experience in terms of both their cycling and the environment in which it takes place. They are also seeking to improve skill levels and take on bigger personal challenges.

In terms of overall requirements, **key commonalities** were observed across all the segments. **Level 1 priorities focus** on the **environment/scenery of the destination, the accommodation and the routes/trails available**. **Level 2 priorities** incorporate the **provision of other activities** such as sightseeing, indoor and (to a lesser extent for the leisure segments) outdoor activities and the **manageability of the weather**.

In some respects, these needs play to the perceived strengths of the Scotland offering, such as beautiful and varied natural environment, vast range of sightseeing opportunities at all levels and accessible countryside.

However, at the **specific cycling level**, perceptions exist which can feed into **Scotland's primarily mid range positioning**. It can be viewed amongst **Leisure** as **potentially more difficult terrain and lacking in sufficiently easy routes**, whilst **certain Specialists** can view it as **intermediate level but not seriously difficult and testing enough**. This tends to leave Scotland in a mid range positioning which is talking to more confident and/or intermediate level cyclists but can be at the expense of those seeking less or more of a challenge.

In terms of the Scottish cycling product offering, particular weaknesses were perceived (or experienced) amongst both Leisure and Specialist segments.

For the Leisure cyclists the main issues appeared to be a perceived lack of easy paths for cycling, unclear entry points/access to routes, absence of safe, short and predictable routes for family groups and issues with easily accessible bike hire across Scotland. For the Specialist segment, perceived weaknesses largely related to a perceived lack of difficult routes / trails (compared with Europe e.g. the Alps, 'Tour de France' terrain).

Thus, **key gaps in the Scottish cycling product offering** were identified as **easy routes for casual leisure cyclists and more difficult riding experiences for the experienced top end specialists**. Areas for improvement included **(more) facilities and services to encourage consideration of cycling** as an activity both **at a spontaneous and planned level**.

In support of this, there needs to be **(more) ready and consistent access to cycling information and infrastructure support** (i.e. appropriate accommodation, public transport, good food/drink) – as currently all impetus and effort appears to focus and depend on the visitor.

This research indicates that **the greatest opportunity is in the leisure market and amongst those seeking a casual cycling experience** (i.e. 'Fairweather Breakers', 'Outdoor Aspirers' and 'Recreationalists'). This opportunity lies in building on the trend for cycling holidays with partners, families and groups of friends; the desire to get away from it all; the increasing popularity of mountain biking (particularly amongst older children and young independents); and the interest amongst some segments in off the shelf (effortless) packages – 'pamper and kick ass'.

In terms of the future product, Scott Porter **recommends targeting the Leisure and Specialist markets separately given their distinct needs**.

In targeting **the Leisure segment, cycling should be positioned as part of the experience of Scotland – 'an outdoor experience' with cycling**. Cycling should be fun and easily accessible (i.e. information, bike hire, accommodation.) for groups and families of all levels. As an activity, cycling can provide the opportunity to spend time together in a relatively effortless way, opening up new avenues to explore/have fun/reach a destination, with potential links to other activities (in/outdoor).

In targeting **the Specialist segment, cycling may benefit by positioning it as the way to experience Scotland** given the sheer variety and challenge for experienced cyclists. There is a need to acknowledge skill levels and more individualised needs (not a generic cycling message). In addition, the communications needs to tap into the search for increased athletic prowess ('Fanatics') and the desire for improvement of personal skills ('Upgraders') as well as the increase in cycling group activities (mountain-bikers).

Overall, there is a **strong need to raise the awareness and profile of cycling as an activity in Scotland**. This can be aided through **(more) targeted marketing, increasing the profile** and **availability of Scotland cycling resources and services** and **tailoring the product offering** to ensure communication is relevant and motivating to the key target audiences. This is critical to ensure the message matches the reality, as currently there is the potential to exceed expectations.

APPENDICES

Appendix 1

More specific objectives were defined as follows:

- to assess volume and value of the cycling and mountain biking holiday market to Scotland;
- to assess strengths and weaknesses of cycling in Scotland;
- to understand more fully the characteristics and motivations of this market (i.e. demographics, psychographics, holiday planning mechanism);
- to assess what might encourage consumers to enjoy cycling or mountain biking as part of a Scottish holiday (i.e. ease of bike hire, packages including cycling, routes information, non-car transport etc);
- to assess from consumers where they are likely to go instead of Scotland;
- to understand more fully the perceived difference between cycling and mountain-biking (if any).