



» Cycling

MARKET RESEARCH 2013

» Current Market Performance

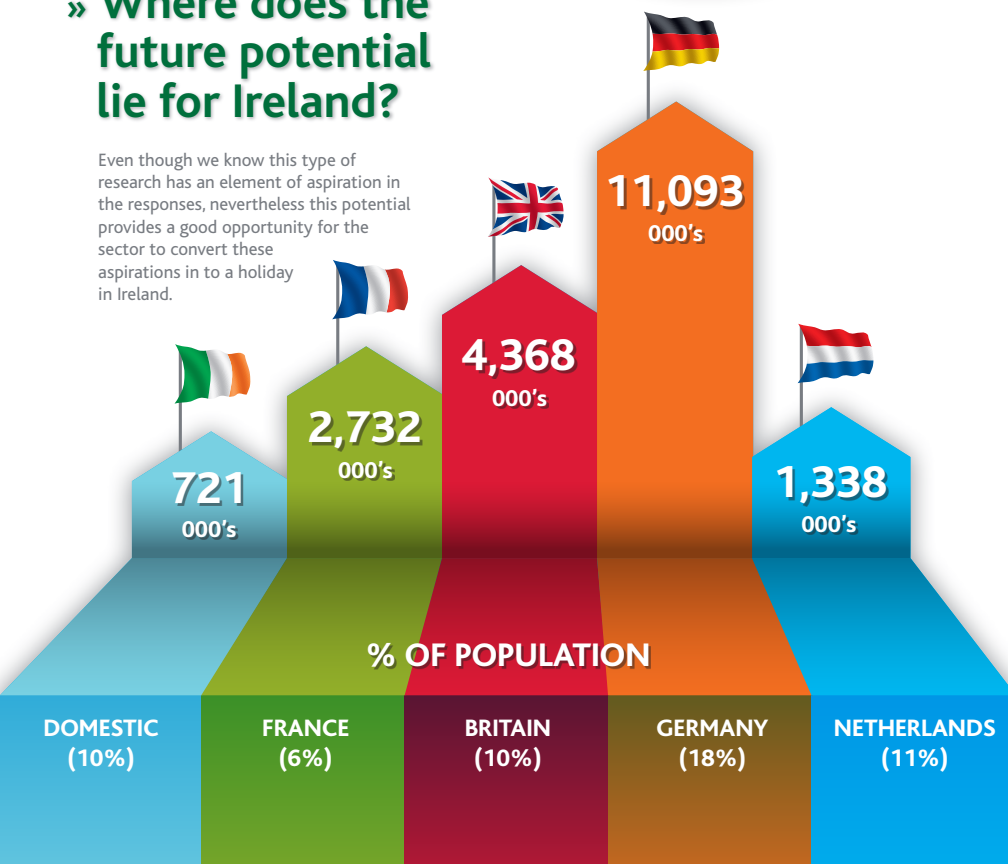
Share by market:

- Britain (18%)
- Mainland Europe (54% - including France 12%; Germany 9%);
- North America (18%)
- Other long haul (10%)



» Where does the future potential lie for Ireland?

Even though we know this type of research has an element of aspiration in the responses, nevertheless this potential provides a good opportunity for the sector to convert these aspirations in to a holiday in Ireland.



» Future Market Potential

In market research commissioned by Fáilte Ireland in 2013, nearly 15,000 interviews were conducted across the Irish and four key overseas markets of Britain, France, Germany and the Netherlands. The following sets out the 'core' market potential opportunities and challenges for the cycling offer in Ireland.

As part of this research we also asked consumers to tell us the types of things which make up a good cycling destination and to tell us about the types of trails they like to use when cycling on holiday. This was done with a view to informing future cycle tourism infrastructure development about the needs and preferences of the consumer.



Southern Ireland is on my bucket list. I've always wanted to go because of the scenery.

65-54 year old British female

- The largest potential market for cycling in Ireland is Germany, due to its large population and high proportion of people who cycle abroad.
- Neighbours Britain also offer good cycling market potential. The proportion of the population engaging in cycling is much lower than in Germany, nevertheless it offers a high core market potential of over 4 million people.
- The Netherlands is a smaller potential market because of its small population; however, a concerted effort could make this market cost effective to target.
- France offers less opportunity for Ireland as a large proportion of the French say they do not go on holiday abroad, perhaps finding that their own country already offers them everything they want.
- In addition there is a strong domestic market demand for cycling in Ireland.

1 Core Market Potential: those that have participated in this activity whilst on holiday abroad in the last 2 yrs, and would consider participating in this activity on holiday in Ireland in the next 3 yrs.

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If I go to Ireland, I expect it to rain on some days, so I would always have a plan B each day. That's why its important to have a route which takes in interesting attractions.

45-54-24 year old German male

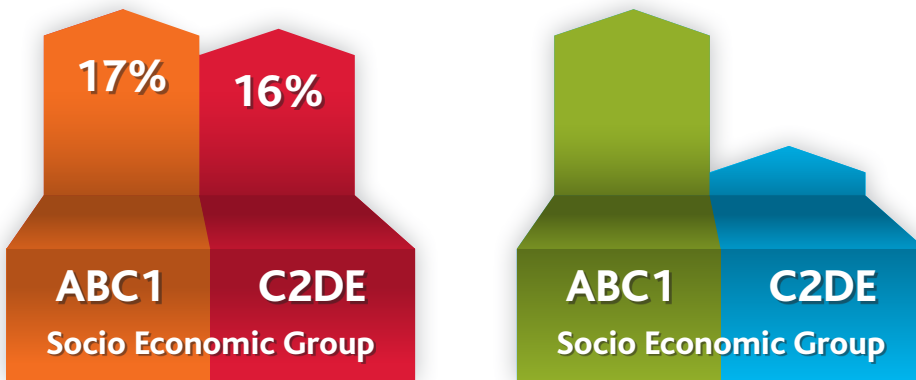
» Market Profile - Who are these people?



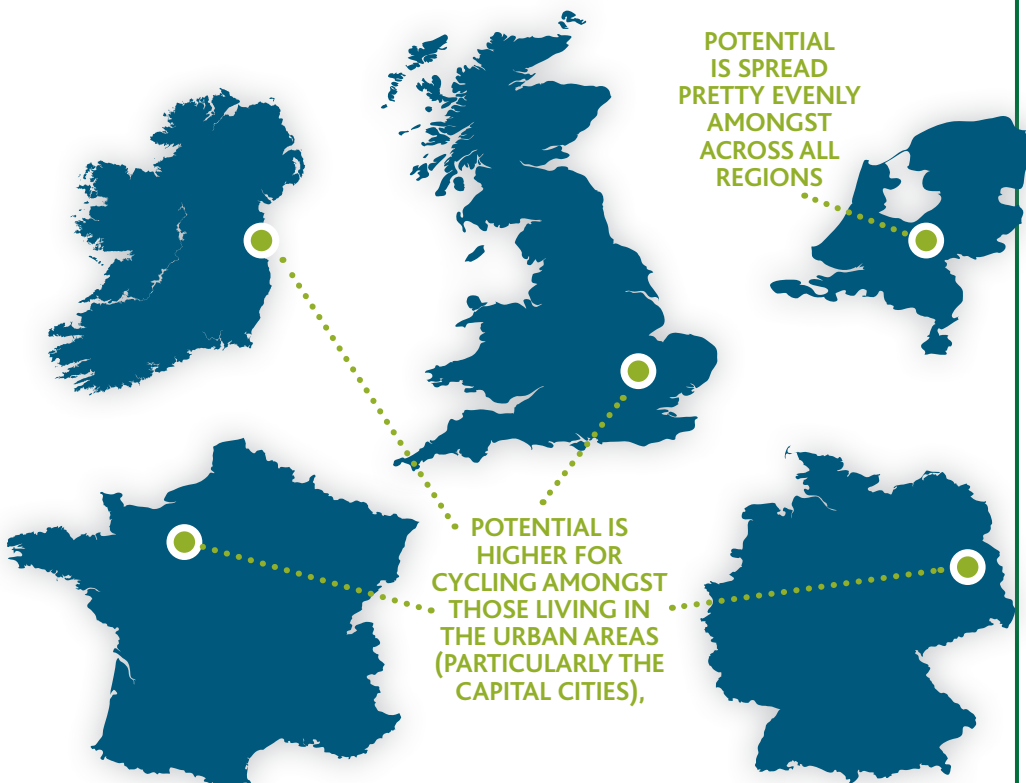
IRISH MARKET



OVERSEAS MARKET



- Cyclists are likely to be found amongst any age but incidence tends to increase slightly with younger age, and is slightly higher among men.



- One of the most important things to note about both the overseas (38%) and the Irish cyclist (41%) is that a significant portion travel in a group of family or friends which contain children.
- This has a significant bearing on the infrastructure and services required, and even the promotion and marketing of the offering, as safe and traffic free cycling is key to this market.

» What makes a good cycling destination?

Interestingly when asked what makes a good cycling destination, the cycling specific attributes were not priorities for people. Rather scenery and landscape, attractive towns and villages etc, were more important.

- Visitors will choose a destination based on the overall experience of what they will see and do and cycling is an enjoyable means of experiencing those other activities.
- It is important therefore that any planned route allows visitors to have that rounded holiday experience by frequently incorporating interesting places to visit.
- Beautiful scenery is easily the most important destination attribute with respect to cycling.
- That said, the scenery needs to be varied, as too much of the same thing will become boring.
- Weather also ranks highly in preference however it's not the be all and end all.
- Cycling routes incorporating attractive cities and towns (47%), followed by access to historical/ cultural attractions (42%), and destinations that are easy to get to (41%) complete the list of attributes required to make a good cycling destination.
- The domestic market has similar preferences, although value for money (53%) also rates highly.

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The villages, the picturesque countryside, the Irish people all make me want to discover Ireland.

18-24 year old British female

» What makes a good Cycling Tourism Trail?

- In order to dig deeper respondents were also asked think of their ideal cycling route, and to indicate their preference between each pair of route attributes as indicated below².

	STRONG PREFERENCE	SLIGHT PREFERENCE	NO OR EQUAL PREFERENCE	SLIGHT PREFERENCE	STRONG PREFERENCE	
Routes from A to B (ie. not circular)	5%	19%	19%	41%	16%	Circular routes
Close to towns / villages	4%	27%	24%	36%	9%	Away from it all / mostly rural
Segregated / traffic-free cycle routes	13%	33%	21%	26%	7%	Light traffic on-road cycle routes
Short distance routes (0 - 50km)	22%	37%	18%	18%	5%	Medium to Long distance routes (50km+)
Flat gradients / easy routes	17%	39%	23%	17%	4%	More challenging routes / varied gradients
Rely on own transport	10%	35%	34%	17%	4%	Solely relying on public transport links
Variety of other activities available	17%	37%	24%	18%	4%	Focus mainly on cycling
Open landscape / very little shelter	4%	14%	30%	44%	8%	Routes with natural shelter
Routes through flat wild boglands / farmland	8%	32%	34%	22%	4%	Routes along old railway lines
Most scenic route	24%	44%	19%	11%	2%	Most direct route
Short distances between services (<20km)	18%	39%	26%	14%	3%	Greater distances between services (20 - 40km)

² We have only presented the results from the overseas markets here as the results for the domestic market are almost identical.

» What makes a good Cycling Tourism Trail?

Generally the overall holiday experience is more important than the more technical set-up for cycling. However visitors do have particular preferences in relation to the types of trails and services which they require.

- Beautiful scenery and landscape was the top priority for the overseas and domestic markets.
- This was followed by requirements for traffic free and safe cycling routes, perhaps reflecting the large proportion of the market that travels with children.
- Access to towns and villages and attractive cities and towns were also important, with a range of things to see and do also ranking in the top five with the domestic market.

- As 41% of the potential domestic market and 38% of the potential overseas market for cycling in Ireland travel with children, the importance of delivering trails which meet the needs of this market segment cannot be overstated.
- Children have a significant bearing on cycling needs, and this particular market segment is very wary of mixing with traffic, although road crossings are acceptable with warnings and maximum safety.

This further reinforces the market preference for scenic, flat, traffic free routes, with lots of things to see and do, and with short distances between services.

» Conclusions for Cycling Tourism

The research has many implications for Ireland's cycling offer with respect to strategy, trail design, services, targeting and promotion.

IMPLICATIONS FOR STRATEGY

A strong business case can be made for the development of cycling tourism with some significant markets to target if the right infrastructure can be delivered on the ground.

- Germany in particular offers an extremely high core potential market due to its large population and high proportion of people who cycle abroad.
- Britain also offers high core market potential
- The core market potential in the Netherlands is smaller but concentrated
- There is also a sizeable domestic market potential which remains untapped

IMPLICATION FOR ROUTE SELECTION AND DESIGN

- Scenery is the main priority amongst both the domestic and overseas markets
- There is a strong preference for safe and traffic free routes particularly to meet the needs of the high proportion of cyclists who travel with children
- Points of shelter are needed to overcome Ireland's weather barrier
- Flat routes are preferred- and won't be boring to dedicated cyclists
- These types of routes can cater for nearly everyone's needs (except extreme segments)

IMPLICATIONS FOR TARGETING

Cyclists are more likely to be found amongst the following groups:

- Any age, but incidence tends to increase slightly with younger age
- ABC1's if overseas
- Those living in a major city
- Either gender, but incidence is slightly higher among men

IMPLICATIONS FOR SERVICES

- Services should not be more than 20km apart - less than 15km if possible
- Food, drink, toilets and places to sit are important services
- Accommodation only needs to be simple, but must do the basics well
- Detailed route maps should be provided, with attractions and services clearly marked
- Attractions, towns, villages etc on route must offer reliable facilities to lock up bikes
- An emergency contact for help would be welcomed
- Guides and organisers are not really needed
- Public transport is not needed by the majority
- Luggage transfer would be welcomed
- Different drop off points for bike hire would be desired



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I can put up with road crossings if it means enjoying the more scenic route

55-64 year old German, female

» Fáilte Ireland's Cyce Tourism Market Research

The full results from the cycle tourism market research undertaken by Fáilte Ireland can be downloaded on www.failteireland.ie.

This research also identified the potential market size for walking, equestrian, angling, sailing and waterbased activities and perceptions of Ireland for these activities.