

# CYCLING SPORTS TOURISM: A SYSTEMATIC REVIEW AND META ANALYSIS OF VOLUME, VALUE AND MARKET SEGMENTS

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## Abstract

### Aim of Paper

The aim of this paper is to conduct a worldwide systematic review and meta-analysis of scientific and practice evidence on the volume and value of cycling sports tourism, and to derive actionable market segments from the meta-analysed data.

### Literature Review

Research on sports tourism has been dominated by event sports tourism (Weed, 2006). However, there are some clear examples of substantial sports participation tourism markets, including ski sports tourism, golf sports tourism and cycling sports tourism. This latter of these, cycling sports tourism, has been a growing area of niche interest within the study of sports tourism, with examples of research existing in most developed countries around the world (e.g. Picton & Bull, 2003, Simonsen & Jorgenson, 1998).

Of course, the provision of facilities and the development of resources for cycling sports tourism in a region also provides for leisure day trip cycling participation by local residents, which can have an impact on the health and quality of life of the local population. Various models have been developed to estimate the economic value of such health impacts (Kahlmeier et al, 2010) and such benefits can be included in assessments of the potential economic impact of cycling provision in a particular region.

### Methodology

The systematic review methodology is now widely used in evidence-based policy-making and practice in areas as diverse as urban regeneration, housing, criminal justice,

education, social care, economic development and public health. Systematic review differs from a traditional narrative literature review as it explicitly focuses on an objective, replicable, systematic and comprehensive search of literature and research evidence, and includes a transparent audit trail of methods and processes (Coren & Fisher, 2006).

The worldwide systematic review reported here draws on the evidence-base in the research and practice literature on cycling sports tourism and leisure cycling around the world to answer the following review questions:

- 1) What are the potential economic benefits, environmental impacts, and health and quality of life outcomes achievable from the provision of cycling tourism and leisure cycling opportunities in a particular region?
- 2) What are the key factors and inputs that are required to maximise economic impacts from visitors and health and quality of life impacts for local residents, and to minimise any negative environmental impacts?

Following standard systematic review search protocols and quality assurance assessments, 49 studies were included in the final review (from initial search returns of over 12,000), including eleven studies containing sufficient data to conduct a meta-analysis of cycling sports tourists spending, and four full datasets from which a more detailed meta-analysis could derive market segments.

### Results, Discussion and Conclusions

**CYCLING SPORTS TOURISTS SPENDING:** The cycling sports tourism product varies considerably, from trails that are part of long point-to-point networks, like the C2C route across the North of England, to those that are relatively small circular routes (e.g. the Viking Trail in Kent, England). As such, these summary figures represent mean values across a range of studies, adjusted for sample size and sampling artefacts, and inflated (and where necessary converted across currencies) to 2010 UK prices. The meta-analysis derives a value of £7.15 per day for cycling sports tourists that do not stay overnight, from an aggregate sample of 2,162 cyclists across eight studies (low=£5.50/high=£12.74). For cycling sports tourists staying overnight, a value of £48.32 per person per day is derived from an aggregate sample of 2,411 cyclists across six studies (low=£36.50/high=£95.14). Finally, the mean value for all cyclists, regardless of whether an overnight is involved is £15.81, derived from an aggregate sample of 6,874 cyclists across eleven studies (low=£13.50/high=£28.00).

**CYCLING SPORTS TOURISM MARKET SEGMENTS:**

Initial meta-analysis suggests seven market segments with distinctive behavioural and spending profiles, the first two of which do not bring additional spend to the local economy, but do have a local economic impact as a result of the health costs saved by their physical activity participation. These segments are: near residents, far residents, near day-trippers, far day-trippers, near holidayers, far holidayers, and cycle tourers. Perhaps surprisingly, cycling tourers, those cycling sports tourists on a traditional point-to-point cycling holiday, comprise less than 1% of the overall market. The detailed behavioural profiles, and the volume and value of each of these segments will be discussed in detail in the presentation.

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