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NORTH AMERICAN MOTORCYCLE  
TOURISTS  
IN NORTHERN ONTARIO (RTO13)  
A SITUATION ANALYSIS

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PREPARED FOR

TOURISM NORTHERN ONTARIO

BY

 Research Resolutions & Consulting Ltd.



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## EXECUTIVE SUMMARY

### OVERVIEW OF MOTORCYCLE TOURISTS

#### Who are “motorcycle tourists”?

The Travel Activities and Motivation Surveys (TAMS) captures activities and places visited on overnight pleasure trips over a two-year period but does **not** provide a link between activities and specific locations.

Thus, in this report motorcycle tourists in Northern Ontario or Ontario are:

- Adults (18+) who have taken overnight pleasure trips to **any destination** over a two-year period; and
- Rode a motorcycle during at least one of their overnight pleasure trips in the past two years.

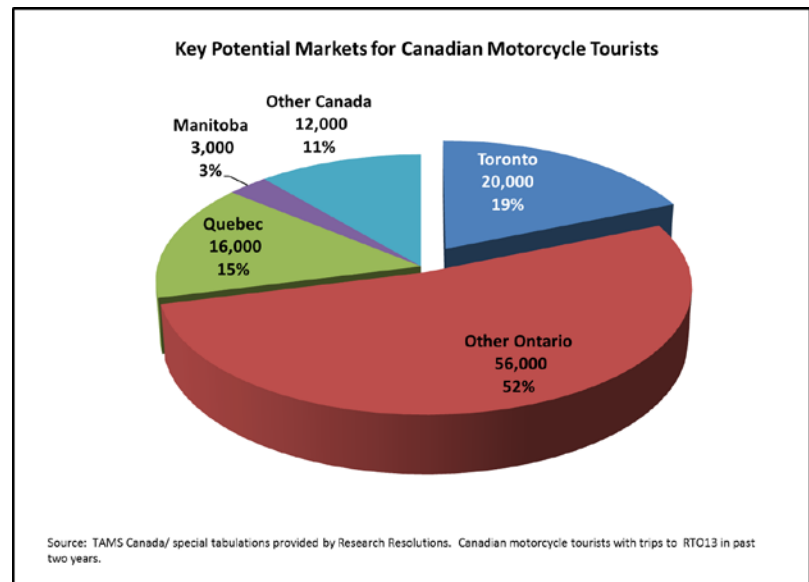
**The motorcycling experience could have been on a trip to Northern Ontario/Ontario or any of the other destinations visited over the two-year span.**

**One-fifth of Canadian motorcycle tourists or about 107,000 have travelled in Northern Ontario over a two year period.<sup>1</sup>**

There are approximately one half million Canadians who claim to ride motorcycles while on overnight pleasure trips (543,000) and about one fifth of them have travelled in Northern Ontario over a two-year period.

Because so many Canadians travel near where they live, it is not surprising that Northern Ontario attracts riders who live in Ontario at an especially high rate. The region enjoys visits by 76,000 or half of the 153,000 motorcycle tourists who live in the province. Over one quarter of Manitoba’s 11,000 riders are also visitors to Northern Ontario (3,000).

About 40,000 motorcycle tourists live in Toronto and approximately half of them, or 20,000, have travelled in Northern Ontario, making Torontonians the single largest potential domestic market for the region.

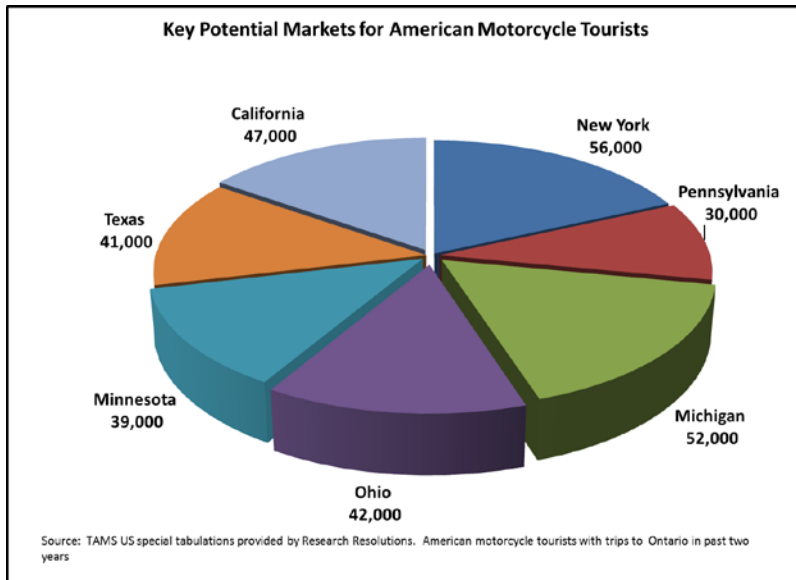


<sup>1</sup> These are Canadians who have visited RTO13 over a two-year period and also rode a motorcycle on at least one of their overnight leisure trips. The motorcycling may or may not have taken place in RTO13.

### Only a fraction of American tourists who ride motorcycles while on trips have Canadian travel experience.

While there are about 5.1 million motorcycle tourists in the U.S.A., those who travel anywhere in *Canada* represent about 844,000 or 16%.

Within the 844,000 motorcycle tourists with Canadian travel experience, 473,000 have travelled in Ontario over a two year period with about 106,000 of them claiming to have travelled in Northern Ontario over the same time period. For analysis purposes, the 473,000 American motorcycle tourists with **Ontario** experience are regarded as Northern Ontario's broadly defined market, with about 300,000 identified as key target markets for the region (displayed in the accompanying chart).<sup>2</sup>



These tourists live across the U.S. and, like all American motorcycle tourists, tend to be concentrated in *fair weather* regions such as California and Texas. Over 40,000 of the motorcycle tourists from each of these states have been to Ontario on overnight pleasure trips.

They join motorcyclists from Northern Ontario's more traditional markets such as New York (56,000), Michigan (52,000), Ohio (42,000) and Minnesota (39,000) to create a potential of over 300,000

motorcyclists for the province and its North (sum of tourists displayed in the accompanying chart).

motorcyclists for the province and its North (sum of tourists displayed in the accompanying chart).

### The potential Canadian and U.S. markets for Northern Ontario share some demographic characteristics.

Most are men, concentrated in the middle age and recently-retired age groups. The Canadian market is concentrated in the 35 to 44 year age bracket (39%) whereas almost half of the Americans are between 45 and 64 years of age (47%). These differences result in a somewhat older motorcycle touring market among Americans (45 years, on average) than Canadians (39 years of age, on average).

<sup>2</sup>Americans who have taken overnight pleasure trips to Ontario are used in this analysis because the base size of those with Northern Ontario travel experience in the TAMS US survey is too small to warrant detailed scrutiny. Recall that American motorcycle tourists who have visited Northern Ontario or other parts of the province may or may not have engaged in motorcycling while on their trips to these destinations.

**American motorcycle tourists to Ontario are somewhat less affluent than the corresponding Canadians.**

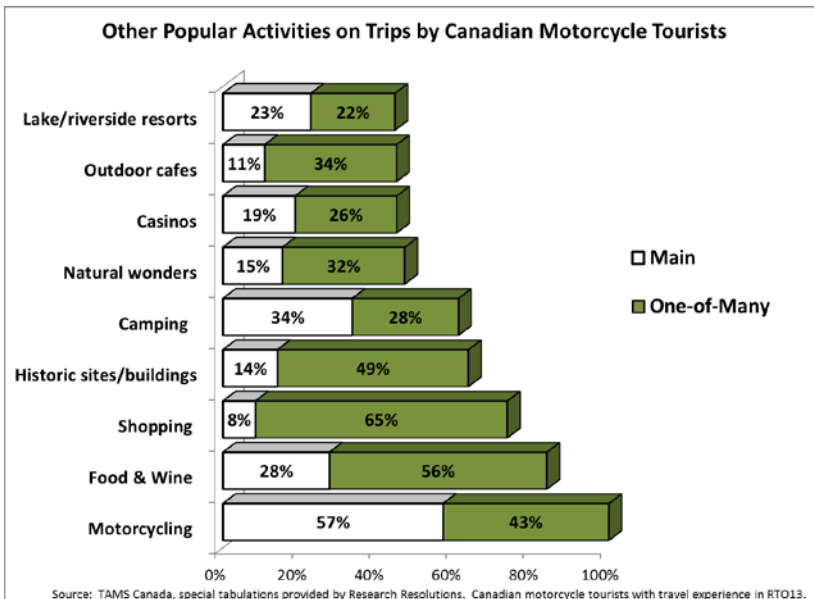
Half of Canadian motorcycle tourists travelling in Northern Ontario have household incomes of at least \$100,000 (54%) whereas less than one third of the Americans are in this income group (29%). Industry analysts suggest that the many American motorcycle tourists are recent retirees or nearing retirement from primarily blue collar occupations.

TRIP ACTIVITIES

CANADIANS

**Motorcycling is the primary reason for the trip to take place for about half of the potential Canadian market.**

For the remaining riders, motorcycling is one-of-many activities in which they engage on



overnight pleasure trips (43%). Camping (34%), various culinary pursuits such as dining in high quality restaurants (28%) and staying at lake or riverside resorts (23%) are the only other activities to be deemed trip drivers by at least one quarter of Northern Ontario’s potential Canadian motorcycle tourists. These activities, along with shopping and going to historic sites or strolling in cities to view architecture form part of the experiences sought by most domestic motorcycle tourists either as the primary reason for a trip or as one of many activities.

Additionally, about one half of Canadian riders who have travelled to Northern

Ontario visited natural wonders, casinos and/or outdoor cafes as a main or other activity on recent trips.

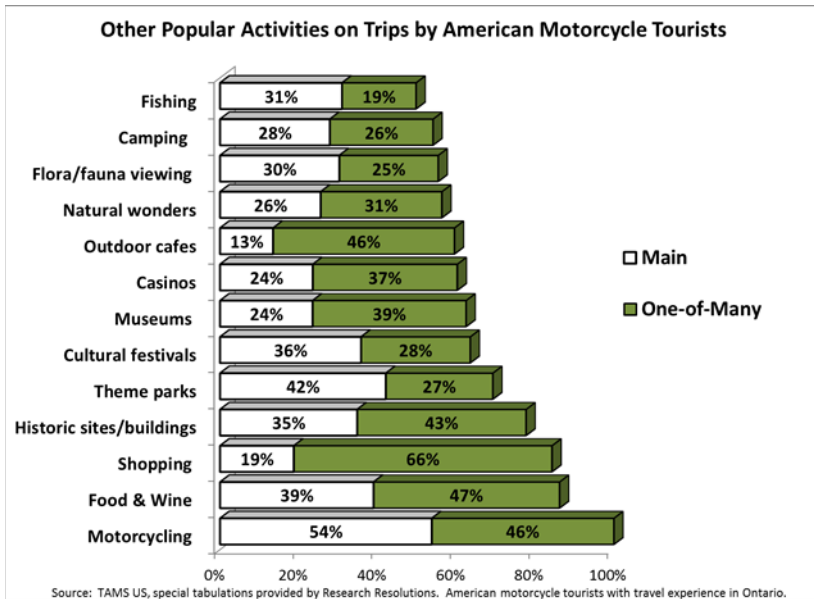
**Those missing from the list of popular trip activities among Canadian riders are of particular importance for Northern Ontario.**

These Canadians do not seem drawn to many of the North’s signature experiences. For example, comparatively few of them engage in outdoor adventure pursuits such as fishing, hiking, viewing wildlife or flora and the like. Similarly, with the exception of viewing historic sites and buildings and natural wonders, these motorcycle tourists have limited interest in many cultural activities such as visiting museums, art galleries, and live theatre or music performances.

AMERICANS

American motorcycle tourists with Ontario travel experience, like their Canadian counterparts, are slightly more likely to consider motorcycling as the *main* reason for a trip than as one-of-many trip activities.

At the same time, the Americans exhibit a broader range of activity preferences than do their Canadian counterparts (see chart).



Recall, however, that unlike their Canadian counterparts, the Americans in Northern Ontario’s potential market have taken international trips. As such, they are likely to be more adventuresome travellers than those who take their motorcycling trips in their own country

Of particular salience for Northern Ontario is the fact that Americans in the potential motorcycle tourist market go camping, fishing and wildlife/wildflower viewing on their trips: activities that might be packaged on motorcycling tours in the region.

SURROGATE ESTIMATES OF VOLUME & VALUE

**Volumetric and diagnostic information about how many and which motorcycle tourists are on Northern Ontario’s routes would fill an important void for tourism operators and marketers.**

A key challenge in undertaking this project has been the absence of reliable volumetric information on the size and economic importance of motorcycle touring in Northern Ontario.<sup>3</sup> To remedy this information gap, Northern Ontario Tourism is encouraged to establish measurement systems to learn more about the people who are actually riding through Northern Ontario on their motorcycles. Why? Realistically, the primary source of tourism statistics – the Statistics Canada domestic and international tourism surveys – are unlikely to capture motorcycle tourism data in the foreseeable future.

<sup>3</sup> Research Resolutions asked representatives of Northern Ontario’s sub-regional tourism and economic development departments to supply information on the volume and characteristics of motorcycle tourists in their jurisdictions. These representatives indicated that while this type of information would be very valuable, it is not collected in a systematic manner. See Introduction for more discussion of this topic.

Hence, the responsibility to initiate a research program that provides *hard* information on the volume and value of this niche segment will likely fall to provincial and regional authorities. In the mid- and long term, it would also be useful to obtain input from motorcycle tourists about their experiences in Northern Ontario so the region can refine its offering to capture a larger number of them.

To provide at least a broad sense of volume and spending by motorcycle tourists in the region, Research Resolutions has provided surrogate estimates based on Statistics Canada's tourism surveys (see below) but readers are encouraged to interpret them with caution.

**Based on surrogate estimates, approximately 47,000 to 58,000 North American motorcycle tourists would have been travelling in RTO13 over the course of a year.<sup>4</sup>**

About half of these overnight motorcycle tourists are estimated to be Canadians (53%) and the balance are Americans (47%). Each of RTO13's sub-regions is estimated to attract overnight motorcycle tourists, with about one quarter of the market spending nights in 13A, one third in 13B and two fifths in 13C.

**These motorcycle tourists are estimated to have spent between \$16.0 million and \$20.0 million in Northern Ontario over a year.**

Because American tourists spend appreciably more in RTO13, on average, than do their Canadian counterparts, they represent a much larger share of spending (71%) than they do of motorcycle tourist volume (47%) in the region.<sup>5</sup>

Region 13C is the most successful sub-region in drawing American motorcycle tourists. Because it attracts a higher share of Americans and Americans spend more money, on average, than do Canadians, 13C is estimated to attract over half of the estimated motorcycle tourist spending in RTO13. One fifth of Northern Ontario's motorcycle tourists' dollars would have been spent in 13A and about one quarter in 13B.

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<sup>4</sup> Data derive from data from the Travel Survey of Residents of Canada and International Travel Survey (US).

Assumptions:

(1) A motorcycle tourist will name a "motorcycle" when asked to identify the main mode of transportation used in Canada;

(2) estimates include Canadians and Americans on overnight trips with at least one night spent in RTO13;

(3) motorcycles are included in the "other" category of main transportation mode in the surveys, but this category also includes bicycles and travelling on foot (e.g., hikers). Estimates of volume presented here assume that between 60% and 75% of overnight visitors to RTO13 in the "other" mode category are motorcycle tourists. The lower estimate assumes 60% and the higher estimate assumes that 75% of "other" main mode overnight travellers are on motorcycles.

<sup>5</sup> Spending estimates are calculated using average per person Canadian overnight visitor spending in RTO13 at \$187.00; Americans at \$519.00 (all modes, all purposes).



### Motorcycle touring is a niche market for Northern Ontario.

Based on these estimates, the motorcycle touring market is clearly a niche market for Northern Ontario. For example, this market likely brings appreciably smaller numbers of tourists to the region than do fishing or non-consumptive nature-based activities. The figures below represent *actual* overnight person visits in RTO13 over a year by Canadians and Americans who engage in the stated activity while on their trip to the North.

#### North American Overnight Trips in Northern Ontario

Fishing	1,060,000 (actual)
Nature/Outdoors*	792,000 (actual)
Hunting	76,000 (actual)
Motorcycling	47,000 to 58,000 (estimated)

Actual estimates from TSRC 2010; ITS US 2011, overnight person trips in Northern Ontario with specified activity.

\*Excludes hunting/fishing

## DREAMS AND ECONOMIC REALITIES

### Motorcycle touring is commonly characterized as “the stuff of dreams”.

For many, motorcycle riding is a post-retirement indulgence people can afford once they are empty nesters, have the financial wherewithal to purchase an expensive machine and have the time to take extended holidays. No wonder a severe economic downturn dampened many of these dreams: in 2008/2009 there was appreciably less discretionary income and a lot more worry about the future.

### Motorcycle sales fell dramatically on both sides of the border following the 2008/2009 recession.

In Ontario, almost 21,000 new units were sold in 2007 but only 12,200 were sold in 2012 (-41%). Sales fell at about the same rate across Canada as a whole (-38%). A similar decline in sales hit the U.S. during the most recent recession. Industry sources indicate that sales of on-highway motorcycles reached approximately 611,000 units in 2008 whereas only about 318,000 new units were sold in 2012 (-48% over four years).

Recovery from the deep downturn has been slow, with only marginal growth in sales over the past couple of years. In light of these sales data, those building tourism products for the motorcycle segment should consider how closely tied this market is to general economic conditions.

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## DESCRIBING THE INDESCRIBABLE

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### **Motorcycle tourists are difficult to pigeon hole.**

They come from every walk of life, travel individually, in groups or with a partner; take day rides and touring *holidays*; they plan their trips in advance or make impromptu decisions about where and when to travel. In light of their high degree of diversity, it is impossible to characterize *all* or even *most* motorcycle tourists. Nonetheless, some commonly cited attributes and attitudes are provided here to lend colour to the profile of the motorcycle tourists Northern Ontario wants to attract.

### **Many motorcycle tourists seek winding back roads and beautiful vistas.**

Whether citing *Zen and the Art of Motorcycle Maintenance* or a motorcycle tourist explaining why he rides, for many motorcycle tourists, *it's the ride rather than the destination* that attracts them.

*On a cycle the frame is gone. You're completely in contact with it all. You're in the scene, not just watching it anymore, and the sense of presence is overwhelming.*<sup>6</sup>

*One of the most distinct things about riding is that nothing feels quite like a motorcycle; the thrill of being at one with a two-wheeled machine that weighs only a few hundred pounds is one of the purest ways to get from point A to B, and the risks involve sometimes even heighten that enjoyment.*<sup>7</sup>

### **Camaraderie and fraternity are important to many motorcyclists.**

In one study, two thirds of motorcyclists cite camaraderie as a reason to ride. From 40% to 60% are estimated to be club members.<sup>8</sup> Many purchase and wear clothing and accessories to highlight their “group” identity. Hence, it is not surprising that they commonly take touring trips with a group of buddies or, much less commonly, with a partner. They also attend rallies such as those held in Port Dover or Sturgis North Dakota. At events such as these, motorcycle tourists are looking for a “good time”.

### **Many motorcycle tourists favour smaller, family-owned businesses.**

These might include B&Bs, non-chain motels, mom-and-pop coffee shops and diners with a welcoming attitude toward motorcyclists. These types of business are perceived to offer good value and customer service.<sup>9</sup>

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<sup>6</sup> Robert M. Pirsig, *Zen And The Art Of Motorcycle Maintenance: An Inquiry Into Values*.

<sup>7</sup> Why Ride a Motorcycle? Basem Wasef, [http://motorcycles.about.com/od/motorcyclingbasic1/ss/Why\\_Ride.htm](http://motorcycles.about.com/od/motorcyclingbasic1/ss/Why_Ride.htm).

<sup>8</sup> This is a voluntary, non-random study conducted among over 700 *beltdrivebetty.blogspot.ca* subscribers during 2007/2008. Information should be interpreted with caution.

<sup>9</sup> *Ontario's Southwest Motorcycle Tourism Report*, June 2011, pg. 21.

**Motorcycle tourists have no clear preferences for lodging options while on a vacation touring trip.**

Instead, during the ten to fourteen days they claim to be on motorcycle vacations annually, these tourists use a wide range of accommodation with considerable duplication. Campgrounds, motels and the homes of friends and relatives are especially popular.<sup>10</sup>

**Being “motorcyclist welcoming” means understanding the practicalities of travelling on a motorcycle.**

For example, small gas tanks and limited baggage capacity dictate the need for touring routes with refuelling and refreshment opportunities every couple of hours or so.

Some amenities help create a *motorcycle-friendly* impression. These could include coat racks with shelves for helmets, storage areas for gear, secure parking areas away from cars and trucks and/or installing a sign signalling that *motorcycles are welcome*.<sup>11</sup>

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<sup>10</sup> This is a voluntary, non-random study conducted among over 700 *beltdrivebetty.blogspot.ca* subscribers during 2007/2008. Information should be interpreted with caution.

<sup>11</sup> *Ontario's Southwest Motorcycle Tourism Report*, June 2011, pg. 22

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## DETAILED FINDINGS

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### INTRODUCTION

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Northern Ontario's spectacular vistas and winding roads are a "natural" for the motorcycle touring segment. And indeed, this segment has long been identified as a promising market for Northern Ontario. In conjunction with Ontario Tourism Marketing Partnership Corporation (OTMPC), Northern Ontario has devoted considerable effort to developing routes and promotional materials to attract motorcycle tourists.

Each of RTO13's sub-regions has developed motorcycle touring routes, either wholly contained within the region or in conjunction with neighbouring jurisdictions. For example, the Lake Superior Circle Tour traverses roadways in Northern Ontario, Michigan, Minnesota and Wisconsin while Ride Manitoulin is fully contained in Ontario.

#### Examples of Motorcycle Touring Routes in Northern Ontario

Manitoulin Island Tour	Lake Nipissing Tour	St. Joseph Island
Georgian Bay Coastal Route	Lake Superior Circle Tour	Waterfall & Scenic Lookouts
Great Legends Tour	Deer Trail	Ride the Giant
Lake Temiskaming Tour	Grand Algoma Tour	Nor'Wester

Recreational motorsports continue to be among the products featured in OTMPC's 2014/2015 marketing strategy.<sup>12</sup> At the same time, according to Tourism Northern Ontario's latest marketing strategy, *unprompted awareness of tourism products is low, and core products like angling, hunting, and motorsports rank low amongst consumers when defining unique experiences in the region.*<sup>13</sup>

In the continuing effort to grow the motorcycle touring market for RTO13, Tourism Northern Ontario commissioned Research Resolutions & Consulting Ltd. to undertake a situation analysis. Unlike analogous projects recently completed by the firm on behalf of Tourism Northern Ontario, very little recent *consumer data* is available on the motorcycle touring market segment.<sup>14</sup>

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<sup>12</sup> OTMPC 2014 – 2015 Marketing Strategy, page 21: *Products: hunting, fishing, recreational motorsports, nature and adventure and cities and attractions.*

<sup>13</sup> *Partnerships for a Strong Tourism Industry*, Northern Ontario Tourism Marketing Strategy 2012-2017.

<sup>14</sup> Other reports have focused on high yield anglers, high yield nature/outdoor tourists (excluding those who hunt or fish), hunters and snowmobiling tourists.

For example, the major Statistics Canada tourism surveys do **not** capture information about motorcycling as a tourism activity.<sup>15</sup> Research Resolutions asked representatives of Northern Ontario's sub-regional tourism and economic development departments to supply information on the volume and characteristics of motorcycle tourists in their jurisdictions. They graciously provided *anecdotal* information but indicated that information on market size, spending and other characteristics of motorcycle tourists is not collected in a systematic manner. In response to a series of questions about motorcycling tourism volume and characteristics in a sub-region, one representative provided a description that is likely indicative of other parts of Northern Ontario: *unfortunately, tourism marketers do not have the skills or resources to track this information.*<sup>16</sup>

Consequently, there are no reliable estimates of the volume, characteristics, spending or economic impact of motorcycle tourists in Northern Ontario.<sup>17</sup> In the absence of reliable volumetric information, this report focuses on the following:

- Demographic and trip characteristics of Canadian and American motorcycle tourists who have travelled in Northern Ontario or Ontario on pleasure trips over a two-year period (from the Travel Activity and Motivations Study [TAMS])<sup>18</sup>
- A discussion about the motivations for *motorcycle touring* per se, based on a literature review; and
- Industry data on motorcycle sales and registrations in the U.S. and Canada.

## Good Background Reading

Reports and studies that provide considerable background on the opportunities and challenges of developing and promoting product for motorcycle touring in Ontario are listed below. Readers are encouraged to review these findings in conjunction with this report.

### ***Motorcycle Market Readiness Report, Region 13 B & C, 2011***

The project focusses on how to increase tourism spending as a result of route development and refinement in Regions 13 B & C. (Available from Carol Caputo, [carol@algomacountry.com](mailto:carol@algomacountry.com))

### ***Ontario Parks Guide to Motorcycle Readiness***

A guide to help Ontario become more motorcycle friendly, providing simple, easy to follow advice. (Available from Carol Caputo, [carol@algomacountry.com](mailto:carol@algomacountry.com))

### ***Understanding and Attracting the On-Road Motorcycle Tourism Market to Northern Ontario***

was prepared in 2006. This report provides an overview of motorcycling touring, including vehicle types and sales, opportunities for on-road motorcycling experiences in Northern Ontario and other communication and product development information. (<http://www.tourismpartners.com/publications/IndustryResources/MotorcycleTouring.pdf>)

### ***2011 Ontario's Southwest Motorcycle Tourism Report***

This report focuses on a regional inventory of motorcycle-friendly products and development of a marketing strategy for Southwest Ontario. (<http://swotc.ca/wp-content/uploads/Motorcycle-Tourism-Project.pdf>)

<sup>15</sup> Travel Survey of Residents of Canada (TSRC); International Travel Survey (ITS).

<sup>16</sup> See Appendix for contacted representatives and the questions they were asked.

<sup>17</sup> Very approximate estimates of the volume and spending by motorcycle tourists in RTO13 are provided, based on numerous assumptions applied to the TSRC and ITS US studies. These estimates should be interpreted with extreme caution.

<sup>18</sup> The base size for American motorcycle tourists who have been to Northern Ontario is too small to warrant detailed analysis. Instead, the report focuses on Americans in the motorcycle target market who have travelled in any part of Ontario over a two-year period.

## NORTHERN ONTARIO'S MARKET POTENTIAL FOR MOTORCYCLE TOURISTS

In the following pages, the North American market for motorcycle tourists is explored. Information is based on findings of the Travel Activities and Motivation Surveys (TAMS) conducted in Canada and the United States. The study covers a wide range of activities that are engaged in and/or motivate trips by overnight pleasure travellers in each country. It also provides information on these tourists' destinations worldwide but does not link trip motivations or activities to specific destinations.

Consequently, a North American motorcycle rider may have travelled to Northern Ontario over a two-year period but may or may not have been on a motorcycle trip in the region.

### Who are "motorcycle tourists"?

*The Travel Activities and Motivation Surveys (TAMS) captures activities and places visited on overnight pleasure trips over a two-year period but does **not** provide a link between activities and specific locations.*

*Thus, motorcycle tourists in Northern Ontario or Ontario are:*

- *Adults (18+) who have taken overnight pleasure trips to **any destination** over a two-year period; and*
- *Rode a motorcycle during at least one of their overnight pleasure trips in the past two years.*

*The motorcycling experience could have been on a trip to Northern Ontario/Ontario or any of the other destinations visited over the two-year span.*

### THE POTENTIAL CANADIAN MOTORCYCLE TOURIST MARKET

There are approximately one half million Canadians who claim to ride motorcycles while on overnight pleasure trips (576,000) and almost all of these riders have taken overnight pleasure trips in Canada over a two-year period (543,000 or 94%) (see Table 1).

Relative to their shares of all pleasure travellers, motorcycle riders from Atlantic Canada, Quebec and the two Prairie Provinces are at parity while Albertans and British Columbians are marginally *over-represented* among motorcycle tourists. Conversely, Ontarians are under-represented among riders. Residents of this province represent 39% of *all* tourists but only 28% of those who ride motorcycles and travel within Canada.

Northern Ontario attracts approximately one fifth of motorcycle tourists with Canadian destinations, or about 107,000. These are Canadians who have visited RTO13 over a two-year period and also rode a motorcycle on at least one of their overnight leisure trips.

Of these 107,000 travellers, almost three quarters (71%) are Ontario residents. Quebec is the most noteworthy out-of-province contributor to the potential motorcycling market in the North (15%). This province provides an even higher proportion of Southern Ontario's motorcycle tourists (31%).

**Table 1: Canada's Potential Motorcycle Tourist Market by Place of Residence**

<i>Place of Residence</i>	Riders with Trips in . . . During Past 2 Years			
	All Pleasure Tourists	Canada	Northern Ontario	Southern Ontario
Canada	24.8 million	543,000	107,000*	222,000
Atlantic Canada	7%	7%	5%	7%
Quebec	24%	29%	15%	31%
Ontario	39%	28%	71%	54%
Manitoba	3%	2%	3%	1%
Saskatchewan	3%	3%	1%	1%
Alberta	10%	14%	5%	3%
British Columbia	13%	17%	**	3%

*Special Tabulations, TAMS Canada prepared by Research Resolutions. \*Interpret with caution: extremely small base size.*

*\*\*Less than 0.5%.*

Because so many Canadians travel near where they live, it is not surprising that Northern Ontario attracts overnight leisure trips by Ontario's riders at a high rate (see Table 2). The region enjoys visits by 76,000 or half of Ontario's 153,000 motorcycle tourists. Over one quarter of Manitoba's 11,000 riders are also visitors to Northern Ontario (3,000).

About 40,000 motorcycle tourists live in Toronto and approximately half of them, or 20,000, have travelled in Northern Ontario, making Torontonians the single largest potential market for the region.

**Table 2: Northern Ontario's Potential Motorcycle Tourist Market in Canada by Place of Residence**

<i>Place of Residence</i>	Riders with Trips in Canada in Past 2 Years	Riders with Trips to Northern Ontario in Past 2 Years	Northern Ontario's Share (Horizontal %)
Canada	543,000	107,000*	20%
Atlantic Canada	39,000	5,000	13%
Quebec	159,000	16,000	10%
<b>Ontario</b>	<b>153,000</b>	<b>76,000</b>	<b>50%</b>
Toronto CMA	40,000	20,000	49%
Manitoba	11,000	3,000	29%
Saskatchewan	18,000	1,000	7%
Alberta	73,000	5,000	7%
British Columbia	90,000	**	**

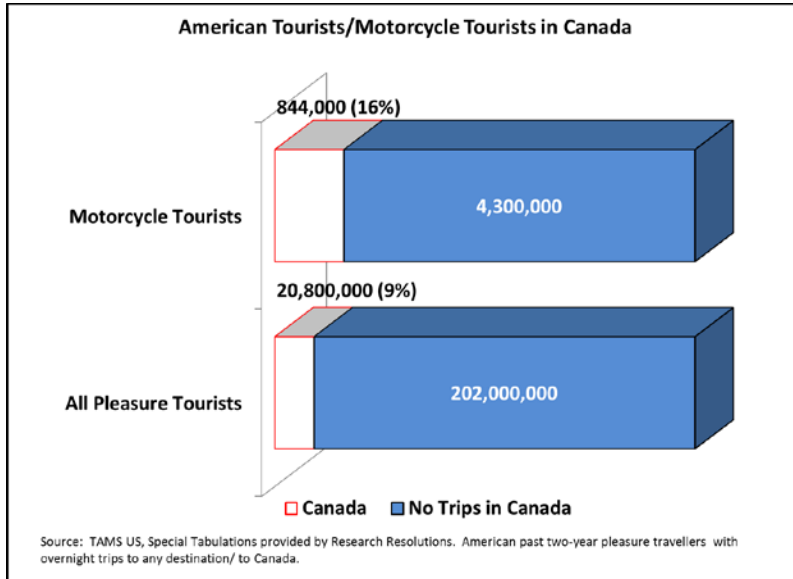
*Special Tabulations, TAMS Canada prepared by Research Resolutions. \*Interpret with caution: extremely small base size. \*\*Less than 0.5%.*

## THE POTENTIAL AMERICAN MOTORCYCLE TOURIST MARKET

Motorcycle tourists in the U.S.A. represent about two per cent of the 222.8 million American overnight travellers, or over 5.1 million people. While this appears to be a robust potential market for Northern Ontario, comparatively few American tourists overall or those in the motorcycling segment have any Canadian travel experience.

Ontario, comparatively few American tourists overall or those in the motorcycling segment have any Canadian travel experience.

In fact, of approximately 222.8 million American adults who take overnight pleasure trips, only about 1-in-10 or 20.8 million travelled to Canada during a two-year period (9%). Similarly, only a fraction – albeit, a larger fraction (16%) – of American tourists who ride motorcycles while on trips have Canadian travel experience. Thus, the full potential market for motorcycle tourists *across Canada* represents about 844,000 of the 5.1 million motorcycle



tourists in the U.S.A.

Within the 844,000 motorcycle tourists with Canadian travel experience, 106,000 or about one eighth have taken overnight pleasure trips to RTO13 over a two-year period. These Americans represent the North’s best potential for attracting American motorcycle riders.

**Table 3: Total U.S.A. Motorcycle Tourist Market**

	Per cent of Pleasure Travellers 18+	
Pleasure Travellers 18+ (Any destination)	222.8 million	
Motorcycle Tourists	5.1 million	2%
	Per cent of Motorcycle Tourists	
Any Canadian Destinations	844,000	16%
<b>Northern Ontario Destinations</b>	<b>106,000</b>	<b>2% of All Motorcycle Tourists</b>
		<b>13% of Motorcycle Tourists who travelled to Canada</b>

Source: TAMS US, special tabulations provided by Research Resolutions.



The incidence of tourists who take motorcycle trips differs substantively across the U.S.A., with especially high concentrations in warm climate zones such as South Atlantic (17%) and Pacific regions (19%) (see Table 4).

Of the American motorcycle tourists who take pleasure trips to Canada, almost one quarter live in the Pacific region (23%). Based on physical proximity, this Pacific market is likely to be more promising for British Columbia than for Northern Ontario. The Mid-Atlantic, East North Central and West North Central regions each contributes about one sixth to one seventh of the American motorcycle tourists who travel in Canada.

Not surprisingly, Northern Ontario's U.S. motorcycle market is especially concentrated in a region that borders the North: East North Central (31%) and, to a lesser extent, the somewhat more distant Mid-Atlantic states (20%). Although base sizes are small, it would seem that Texan motorcycle riders are also drawn to Northern Ontario (19%) though it is not known whether these Texans are riding in the North or engaging in other types of activities on their travels in the region.

Ontario as a whole captures American motorcycle tourists from U.S. regions and states in about the same proportions as does Northern Ontario. Because the base size for these tourists creates more robust estimates of visitor characteristics when viewed at the provincial level, most analysis in this report will be based on the Americans who take trips **anywhere in Ontario** and include motorcycling among their activities.

**Table 4: American Motorcycle Tourists to Northern Ontario by Place of Residence**

	Pleasure Travellers Who Take Motorcycling Trips			
	Total	To Canada	To Northern Ontario*	To Any Ontario
Pleasure Travellers 18+	5,130,000	844,000	106,000	473,000
<b>Place of Residence</b>				
<b>New England</b>	<b>7%</b>	<b>8%</b>	<b>7%</b>	<b>5%</b>
<b>Middle Atlantic</b>	<b>8%</b>	<b>14%</b>	<b>20%</b>	<b>20%</b>
New York State	4%	8%	13%	12%
Pennsylvania	3%	5%	7%	6%
<b>South Atlantic</b>	<b>17%</b>	<b>9%</b>	<b>1%</b>	<b>8%</b>
<b>East North Central</b>	<b>14%</b>	<b>16%</b>	<b>31%</b>	<b>27%</b>
Wisconsin	3%	2%	6%	4%
Michigan	3%	6%	15%	11%
Ohio	3%	5%	10%	9%
<b>West North Central</b>	<b>8%</b>	<b>13%</b>	<b>10%</b>	<b>15%</b>
Minnesota	3%	5%	9%	8%
<b>East South Central</b>	<b>6%</b>	<b>1%</b>	<b>**</b>	<b>**</b>
<b>West South Central</b>	<b>9%</b>	<b>8%</b>	<b>19%</b>	<b>12%</b>
Texas	6%	6%	19%	9%
<b>Mountain</b>	<b>11%</b>	<b>6%</b>	<b>1%</b>	<b>4%</b>
<b>Pacific</b>	<b>19%</b>	<b>23%</b>	<b>11%</b>	<b>11%</b>
California	15%	13%	9%	10%

Source: TAMS US, special tabulations provided by Research Resolutions. \*Extremely small base: interpret with caution. \*\*Less than 0.5%.

States that contribute approximately one tenth of motorcycle tourists with experience travelling in Ontario are listed below. These same states are key markets for motorcycle tourists in RTO13.

- New York 12%
- Michigan 11%
- California 10%
- Texas 9%
- Ohio 9%

## PROFILE OF POTENTIAL NORTH AMERICAN MOTORCYCLE TOURISTS

In this section, profiles of RTO13's potential motorcycle tourist markets in Canada and the United States are provided. The information derives from the TAMS study. People described here meet the following criteria:

- Adults (18+ years)
- Have taken an overnight leisure trip to Northern Ontario (Canadians) or Ontario (Americans) over a two-year period<sup>19</sup>;
- Have done some motorcycling on an overnight leisure trip to any destination over a two-year period.

## TYPE OF MOTORCYCLING TRIPS

North American motorcycle tourists are especially apt to ride on day excursions during their overnight trips (8-in-10 Canadians and Americans). At the same time, about half of them are also riding their motorcycles on overnight touring trips (see Table 5).

**Table 5: Type of Motorcycle Riding on Trips among Motorcycle Tourists**

	Canadians with Trips to Northern Ontario	Americans with Trips to Any Ontario
Day excursion while on a trip of one or more nights	84%	81%
Overnight touring trip	53%	55%

*Source: TAMS Canada/US, Special Tabulations provided by Research Resolutions. Figures add to more than 100% because of duplication.*

<sup>19</sup> The base size for American motorcycle tourists who have been to Northern Ontario is too small to warrant detailed analysis. Instead, the report focuses on Americans in the motorcycle target market who have travelled in any part of Ontario over a two-year period.

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## DEMOGRAPHICS

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The potential Canadian and U.S. markets share some demographic characteristics but differ in others (see Table 6).

- On both sides of the border, men predominate but are somewhat more prominent among Canadian motorcycle tourists (70%) than their American counterparts (63%).
- They are unlikely to be young adults (18 – 24 years) or 65 years of age or older but are spread across the remainder of the age spectrum. The Canadian market is concentrated in the 35 to 44 year age bracket (39%) to a greater extent than U.S. motorcycle tourists who have travelled in Ontario (18%). At the same time, almost half of the Americans are between 45 and 64 years of age (47%) compared to about one quarter of the corresponding Canadians (26%). These differences result in a somewhat older motorcycle touring market among Americans (45 years, on average) than Canadians (39 years of age, on average)

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### **Examples of American Motorcyclists' Occupations**

*Fire Fighter*  
*Forestry*  
*Forklift Operator*  
*Funeral Director*  
*Laborer*  
*Landlord*  
*Machinist*  
*Manager*  
*Mechanic*

[beltdrivebetty.blogspot.ca/2007/05/results-of-our-first-ever-rider-survey.html](http://beltdrivebetty.blogspot.ca/2007/05/results-of-our-first-ever-rider-survey.html)

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- Almost all Canadian riders have at least a secondary school diploma and are spread relatively evenly across the formal education spectrum. Two fifths having a post-secondary diploma/certificate (21%) or university degree (23%). Their American counterparts, on the other hand, are more likely to have at least some post-secondary education (81% for Americans; 64% for Canadians) and to have completed university (34% for Americans; 23% for Canadians).

- In spite of their higher level of formal education, American motorcycle tourists to Ontario are somewhat less affluent than the corresponding Canadians. Half of Canadian motorcycle tourists travelling in Northern Ontario have household incomes of at least \$100,000 (54%) whereas less than one third of the Americans are in this income group (29%). The difference in incomes may reflect the fact that American riders are somewhat older than Canadians, with many no longer in the labour force.

- Other industry information supports the “working class” socio-economic status of motorcycle tourists. For example, a survey by a major American motorcycle blog site suggests that many riders work in blue collar or mid-level white collar jobs or are retired and three fifths have a secondary school diploma or less formal education (63%) (see sidebar).

**Table 6: Demographic Profile of Potential Motorcycle Tourists for Northern Ontario**

	<b>Canadians with Trips to Northern Ontario</b>	<b>Americans with Trips to Any Ontario</b>
<b>Gender</b>		
Male	70%	63%
Female	30%	37%
<b>Age</b>		
18-24 years	9%	5%
25-34 years	25%	23%
35-44 years	39%	18%
45-54 years	20%	29%
55 – 64 years	6%	18%
65 + years	1%	6%
Average age (18+)	39 years	45 years
<b>Education</b>		
Less than high school	4%	1%
High school diploma	31%	11%
Some post-secondary	21%	30%
Post-secondary diploma/certificate	21%	17%
University degree	23%	34%
<b>Household Income*</b>		
Under \$40,000	7%	16%
\$40,000 to \$59,999	17%	21%
\$60,000 to \$99,999	23%	34%
\$100,000 or more	54%	29%

Source: TAMS Canada/US, Special Tabulations provided by Research Resolutions. \*Household income (2006) based on total stating, reported in Canadian currency. \*\*Less than 0.5%.

## ACTIVITIES ON TRIPS AMONG NORTH AMERICAN MOTORCYCLE TOURISTS

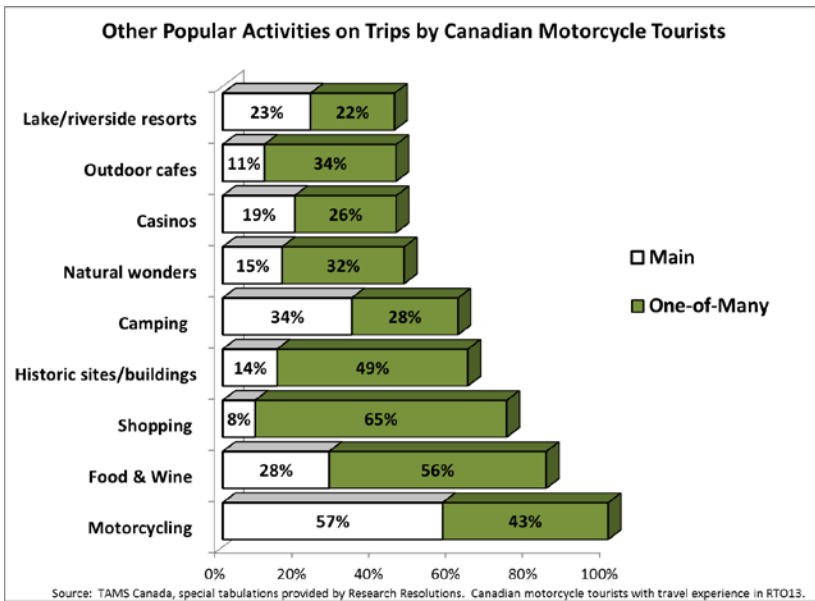
Tourists were asked to identify the activities they had engaged in while on overnight leisure trips over a two-year period. Additionally, they were asked to indicate which of these activities had been the *main reason* for an overnight leisure trip over the same time period.

All tourists described here include motorcycling as “one-of-many” activities on their overnight trips.

### CANADIANS

For a slim majority of Canadian motorcycle tourists with Northern Ontario travel experience (57%), motorcycling is the primary reason for the trip to take place (“main”). For the remaining riders,

motorcycling is one-of-many activities in which they engage on overnight pleasure trips (43%).



Camping (34%), various culinary pursuits such as dining in high quality restaurants (28%) and staying at lake or riverside resorts (23%) are the only other activities to be deemed trip drivers by at least one quarter of Northern Ontario’s potential Canadian motorcycle tourists.

Of course, many more Canadian motorcycle tourists participate in these and other activities than identify them as trip motivators (see accompanying chart and table below).

#### Two Thirds or More as Main or Any

- Food & Wine
- Shopping
- Historic sites/buildings
- Camping

#### Close to Half as Main or Any

- Natural wonders
- Casinos
- Outdoor cafes
- Stay at lake/riverside resorts

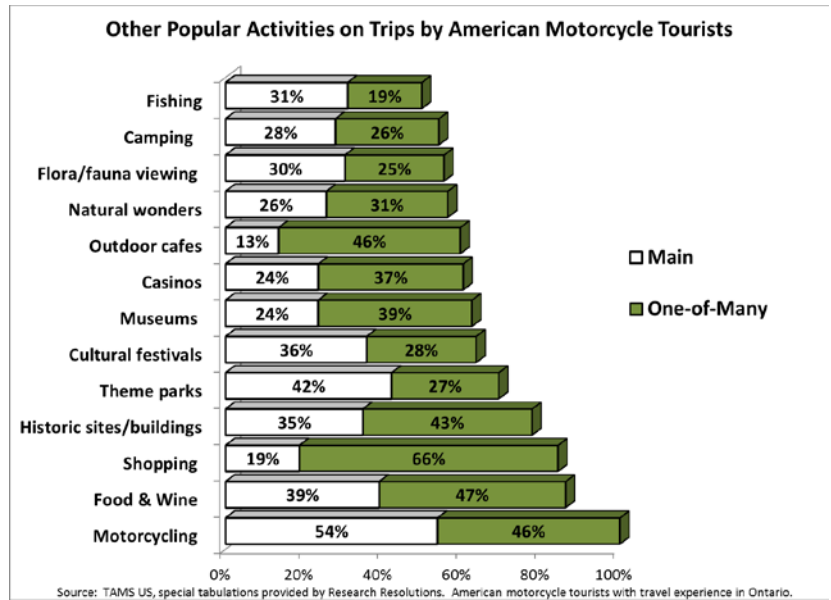
Of particular importance for Northern Ontario are the activities *missing* from the list of popular trip drivers or activities engaged in as “one-of-many” on recent pleasure trips by these tourists. They do not seem drawn to many of the North’s signature experiences: comparatively few of them engage in outdoor adventure pursuits such as fishing, hiking, viewing wildlife or flora and the like. Similarly, with the exception of viewing historic sites and buildings and natural wonders, these motorcycle tourists have limited interest in cultural activities such as visiting museums, art galleries, and live theatre or music performances.

## AMERICANS

American motorcycle tourists with Ontario travel experience, like their Canadian counterparts, are slightly more likely to consider motorcycling as a trip driver (54%, primary reason for a trip) than as one-of-many trip activities (46%). At the same time, the Americans exhibit a broader range of activity preferences than do their Canadian counterparts (see chart below). For example, at least one quarter claim to take trips motivated by the following activities (main):

- Theme parks (42%)
- Culinary activities (39%)
- Cultural festivals (36%)
- Historic sites/buildings (35%)
- Fishing (31%)
- Flora/fauna viewing (30%)
- Camping (28%)
- Natural wonders (26%)
- Casinos (24%)
- Museums (24%)

Even more of these Americans engage in the activities listed above as one of the many things they do while travelling. They are also apt to shop while on trips, though tend not to take trips in order to do so.



Recall, however, that unlike their Canadian counterparts, the Americans in Northern Ontario's potential market have taken international trips. As such, they may be more adventuresome travellers than those who take their motorcycling trips in their own country.

The study findings support this hypothesis. The broader range of trip activities that characterizes American motorcycle tourists who have travelled in Ontario or other parts of Canada does **not** characterize those who have not crossed the Canada/U.S. border on a pleasure trip over a two-year period. It would seem, therefore, that Americans willing to travel to foreign countries – even one as close at hand as Canada – are more adventuresome than *stay-at-home* American motorcycle tourists.<sup>20</sup> By analogy, this finding helps explain the relatively narrow activity profile of Canadian motorcycle tourists described in the previous section.

Of particular salience for Northern Ontario is the fact that Americans in the potential motorcycle tourist market go camping, fishing and wildlife/wildflower viewing on their trips: activities that might be packaged on motorcycling touring in the region.

<sup>20</sup> See detailed tables for figure.

## WHERE ELSE MOTORCYCLE TOURISTS TRAVEL

Over a two-year period, North American motorcycle tourists described in this report have taken overnight pleasure trips to Northern Ontario or other parts of Ontario . . . but they have also travelled to many other places where they may or may not have been riding motorcycles.<sup>21</sup>

Since so many of the Canadian motorcycle tourists with recent travel experience in Northern Ontario are residents of the province (see Table 2), it is not surprising that about two thirds of them have also been on overnight pleasure trips to other parts of the province (68%) (see Table 7). Three fifths have travelled in the United States, two fifths have taken trips to Quebec and one quarter have gone to New Brunswick, Nova Scotia, Alberta and/or British Columbia. Close to half took trips to destinations outside North America over the two year period (45%).

All American motorcycle tourists who have gone to Ontario have also travelled in their own country. Almost all of them have visited destinations in Southern Ontario (91%) while only about one fifth have ventured as far as Northern Ontario (22%). Quebec attracted about one quarter of these tourists over a two year period but comparatively few have gone to locations in Atlantic Canada, the Prairies or western Canada. Over half of them have travelled abroad (55%).

Most of the Canadian and American motorcycle tourists who go abroad are travelling to sun/sea destinations such as Mexico and the Caribbean. Hence, their travel outside North America is unlikely to pose a serious threat for attracting them to Northern Ontario.

**Table 7: Northern Ontario's Potential Motorcycle Tourist Market – Other Destinations**

Locations Visited in Past 2 Years	Canadians	Americans
	with Trips to Northern Ontario	with Trips to Any Ontario
Newfoundland and Labrador	8%	7%
Prince Edward Island	13%	6%
New Brunswick	26%	7%
Nova Scotia	26%	12%
Quebec	41%	25%
Ontario	100%	100%
Northern Ontario	100%	22%
Southern Ontario	68%	91%
Manitoba	15%	9%
Saskatchewan	14%	7%
Alberta	27%	9%
British Columbia	25%	11%
USA (any)	61%	100%
Other Countries	45%	55%

*Source: TAMS Canada/US, special tabulations provided by Research Resolutions. Note: percentages add to more than 100% because of trips to more than one province/region.*

<sup>21</sup> Recall that TAMS findings provide information on *where* tourists travelled and *what they did* on trips (activities) but do not provide information on which activities took place in specific destinations.

## RATINGS OF PROVINCES AS TOURISM DESTINATIONS

North American motorcycle tourists who have been to Ontario have a favourable impression of the province, giving it a rating of eight on a ten-point scale for being an appealing tourism destination (Canadians, 8.1; Americans, 8.0) (see Table 8). Among Canadians, British Columbia is the only other province to approach this score and no other province does so among Americans. It is, however, important to note that at least one third of Northern Ontario's American potential motorcycling market are *unable* to rate most Canadian provinces, likely because they do not have direct experience with them.

**Table 8: Ratings of Canada's Destinations among Northern Ontario's Potential Motorcycle Tourist Market**

	Canadians with Trips to Northern Ontario	Americans with Trips to Any Ontario
<b>Average Rating</b>		
Newfoundland and Labrador	7.3	6.3
Prince Edward Island	7.4	6.7
New Brunswick	7.0	6.3
Nova Scotia	7.5	6.8
Quebec	6.5	6.6
<b>Ontario</b>	<b>8.1</b>	<b>8.0</b>
Manitoba	5.0	6.5
Saskatchewan	4.8	6.6
Alberta	7.4	6.7
British Columbia	8.8	7.4

*Source: TAMS Canada/US, special tabulations provided by Research Resolutions. Averages are based on a ten-point scale ranging from very appealing as a destination (10) to not at all appealing (1). Averages are based on total providing a rating.*



## KEY ATTRIBUTES OF A DESTINATION

The primary factors in a destination choice for *any* type of pleasure trip among Canadian and American motorcycle tourists include the overall safety of the destination, its accessibility by car and having many things for adults to see and do (see Table 9). Mid-range lodging is also a salient factor for these riders. Americans put more emphasis on availability budget and/or luxury accommodation than do their Canadian counterparts.

**Table 9: Attributes in Destination Choice among Northern Ontario's Potential Motorcycle Tourist Market**

% stating each attribute is <i>highly important</i>	Canadians with Trips to Northern Ontario	Americans with Trips to Any Ontario
Feeling safe	63%	63%
Lots for adults to see and do	41%	49%
Convenient access by car	38%	49%
No health concerns	37%	36%
Availability of mid-range accommodation	28%	33%
Low cost package deals	21%	30%
Place very different, culturally, than yours	19%	14%
Being familiar with the culture/language	18%	18%
Direct access by air	17%	31%
Availability of budget accommodation	17%	26%
Availability of camping	16%	19%
Lots for children to see and do	14%	14%
Having friends or relatives living there	7%	4%
Convenient access by train/bus	6%	13%
Offers great shopping	5%	16%
Availability of luxury accommodation	4%	15%

Source: TAMS Canada/US, special tabulations provided by Research Resolutions. Proportions stating that an attribute is "highly important" in selecting a destination.

## BENEFITS OF PLEASURE TRAVEL

Like tourists in general, Canadian and American motorcycle tourists put getting a *break from the day-to-day* and *stress reduction* at the top of their lists of the benefits of any pleasure travel (see Table 10). They also want their trips to generate *lasting memories* and, particularly among the Americans, to offer them *new and different experiences*. Approximately half of them also see pleasure travel as a way to have unscheduled time and/or enrich their relationships with their spouse and other immediate family members.

Possibly because they are somewhat younger than their American counterparts, more Canadian motorcycle tourists put a priority on being physically challenged (31% vs. 19%). More of them also want trips to help keep family ties alive (36% vs. 27%) and renew connections with people outside their family (27% vs. 15%).

In contrast, more American motorcycle tourists want trips to provide knowledge about history, cultures and places (35%) than do Canadians (19%). This greater interest in learning while travelling is likely a reflection of the fact that the American motorcycle riders under review here are those willing to seek out-of-country travel experiences.

A variety of sources suggest that there are other “benefits” to motorcycling including the sense of *fraternity* that derives from a shared set of interests and experiences.

**Table 10: Benefits of Pleasure Travel among Northern Ontario’s Motorcycle Tourist Market**

% stating each benefit is <i>highly important</i>	Canadians with Trips to Northern Ontario	Americans with Trips to Any Ontario
To get a break from your day-to-day environment	79%	67%
To relax and relieve stress	76%	66%
To create lasting memories	68%	58%
To enrich relationship with immediate family	57%	50%
To have a life with no fixed schedule	52%	51%
To see or do something new and different	45%	64%
To keep family ties alive	36%	27%
To be challenged physically	31%	19%
To enrich your perspective on life	30%	35%
To stimulate your mind	30%	24%
To renew personal connections with people	27%	15%
To be pampered	20%	23%
To gain knowledge of history/cultures/places	19%	35%
To seek solitude and isolation	19%	21%
To have stories to share back at home	18%	15%

*Source: TAMS Canada/US, special tabulations provided by Research Resolutions. Proportions stating that an attribute is a “highly important” benefit of pleasure travel.*

## SOME SURROGATE ESTIMATES

In the absence of volumetric information for motorcycle tourists in RTO13, Research Resolutions has created a surrogate estimate based on broad assumptions and data from the Travel Survey of Residents of Canada and International Travel Survey (US). These estimates should be interpreted with extreme caution because the foundational assumptions may under or overstate reality. These assumptions include the following:

- A motorcycle tourist will name a “motorcycle” when asked to identify the *main mode of transportation* used in Canada;
- Estimates include Canadians and Americans on overnight trips with at least one night spent in RTO13;
- Motorcycles are included in the “other” category of main transportation mode in the surveys but this category also includes bicycles and travelling on foot (e.g., hikers). Estimates of volume presented here assume that between 60% and 75% of overnight visitors to RTO13 in the “other” mode category are motorcycle tourists.

## ESTIMATED VOLUME

Based on the assumptions noted above, approximately 47,000 to 58,000 North American motorcycle tourists would have been travelling in RTO13 over the course of a year (see Table 11).<sup>22</sup>

About half of these overnight motorcycle tourists are Canadians (53%) and the balance are Americans (47%). Each of the sub-regions attracts overnight motorcycle tourists, with about one quarter of the market spending nights in 13A, one third in 13B and two fifths in 13C.

**Table 11: Estimated Overnight Motorcycle Visitors in RTO13**

	Assume motorcycles are . . . of “other mode”	
	60%	75%
Total Estimated Overnight Motorcycle Tourists	47,000	58,000
Canada		53%
USA		47%
Sub-Regions		
13A (NE)		26%
13B (NC)		33%
13C (NW)		41%

Source: TSRC 2010; ITS US 2011, special tabulations provided by Research Resolutions.

<sup>22</sup> The lower estimate assumes 60% and the higher estimate assumes that 75% of “other” main mode overnight travellers are on motorcycles.

Based on these estimates, the motorcycle touring market is clearly a niche market for Northern Ontario. For example, this market brings appreciably smaller numbers of tourists to the region than do fishing or non-consumptive nature-based activities.

**Table 12: North American Overnight Trips in Northern Ontario**

Fishing	1,060,000 (actual)
Nature/Outdoor*	792,000 (actual)
Hunting	76,000 (actual)
Motorcycling	47,000 to 58,000 (estimated)

Actual estimates from TSRC 2010; ITS US 2011, overnight person trips in Northern Ontario with specified activity. \*Excludes hunting/fishing.

### ESTIMATED SPENDING

The same basic assumptions used to estimate the approximate size of the motorcycle tourist market in Northern Ontario are used to estimate approximate spending in the region by these tourists (see Table 13). The average overnight person visit spending by Canadians and Americans travelling *by any transportation mode* and for *any purpose* in the region was used in the calculations.

Based on these assumptions, motorcycle tourists travelling in RTO13 spent between \$16.0 million and \$20.0 million over the course of a year. Because American tourists spend appreciably more in RTO13 on average than do their Canadian counterparts, they represent a much larger share of spending (71%) than of motorcycle tourist volume (47%) in the region.

Region 13C is most successful in drawing American motorcycle tourists while 13A is least successful. Since the Americans spend more money, on average, than do Canadians and because 13C captures more of them, this sub-region attracts over half of the estimated motorcycle tourist spending in RTO13. One fifth of these tourists' dollars are spent in 13A and about one quarter are spent in 13B.

**Table 13: Estimated Overnight Motorcycle Visitor Spending in RTO13**

	Assume motorcycles are . . . of "other mode"	
	60%	75%
Total Estimated Overnight Motorcycle Tourist Spending	\$16.0 million	\$20.0 million
Canada	29%	
USA	71%	
Sub-Regions		
13A (NE)	19%	
13B (NC)	26%	
13C (NW)	55%	

Source: TSRC 2010; ITS US 2011, special tabulations provided by Research Resolutions. Average per person Canadian overnight visitor spending in RTO13 = \$187.00; Americans = \$519.00 (all modes, all purposes).

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## WHAT ELSE WE KNOW & DON'T KNOW ABOUT MOTORCYCLE TOURISTS

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Descriptions of motorcycle tourists from a variety of sources suggest a market that is very difficult to pigeon hole because these North Americans come from every walk of life, travel individually, in groups or with a partner; take day rides and touring *holidays*; they plan their trips in advance or make impromptu decisions about where and when to travel.

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### ***It's the experience***

*"In a car you're always in a compartment, and because you're used to it you don't realize that through that car window everything you see is just more TV. You're a passive observer and it is all moving by you boringly in a frame.*

*On a cycle the frame is gone. You're completely in contact with it all. You're in the scene, not just watching it anymore, and the sense of presence is overwhelming."*

Robert M. Pirsig, *Zen And The Art Of Motorcycle Maintenance: An Inquiry Into Values*

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In light of the high degree of diversity, it is impossible to characterize *all* or even *most* motorcycle tourists. The paucity of rigorous studies within this market compounds the challenge of providing a clear picture of who motorcycle tourists are and what they seek from the touring experience.

Recognizing these limitations, the following attributes and attitudes are commonly cited in the literature. They are provided here to lend colour to the profile of the motorcycle tourists Northern Ontario seeks to attract.

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## WHAT ELSE WE KNOW

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### THE EXPERIENCE

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Many motorcycle tourists seek winding back roads and beautiful vistas because *it's the ride rather than the destination* that attracts them.

*One of the most distinct things about riding is that nothing feels quite like a motorcycle; the*

*thrill of being at one with a two-wheeled machine that weighs only a few hundred pounds is one of the purest ways to get from point A to B, and the risks involve sometimes even heighten that enjoyment.*<sup>23</sup>

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## CONTEXT

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In one study, two thirds of motorcyclists cite camaraderie as a reason to ride. From 40% to 60% are estimated to be club members.<sup>24</sup> Many purchase and wear clothing and accessories to highlight their "group" identity. Hence, it is not surprising that they commonly take touring trips with a group of buddies or, much less commonly, with a partner. They also attend rallies such as those held in Port Dover or Sturgis North Dakota. At events such as these, motorcycle tourists are looking for a "good time".

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### ***Rallies & Good Times***

*Over the years the Sturgis rally has earned its fame by attracting motorcycle enthusiasts from all over the globe. But everyone in attendance shares at least one thing in common -- they're all looking for a good time. The weeklong event boasts of bike shows, concerts, motocross events, lots of alcohol and more than its share of unconventional entertainment.*

Neiger, Christopher. "How the Sturgis Motorcycle Rally Works" 10 November 2009. HowStuffWorks.com.

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<sup>23</sup> Why Ride a Motorcycle? Basem Wasef, [http://motorcycles.about.com/od/motorcyclingbasic1/ss/Why\\_Ride.htm](http://motorcycles.about.com/od/motorcyclingbasic1/ss/Why_Ride.htm).

<sup>24</sup> This is a voluntary, non-random study conducted among over 700 *beltdrivebetty.blogspot.ca* subscribers during 2007/2008. Information should be interpreted with caution.

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## PRACTICALITIES

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Small gas tanks and limited baggage capacity dictate the need for touring routes with refuelling and refreshment opportunities every couple of hours or so.

Family-owned businesses such as B&Bs, non-chain motels, mom-and-pop coffee shops and diners with a welcoming attitude toward motorcyclists may have special appeal, in part because they are perceived to offer good value and customer service.<sup>25</sup>

Some amenities in a community or at an establishment help create a *motorcycle-friendly* impression.<sup>26</sup>

- Coat racks with shelves for helmets
- Storage areas for gear
- Rooms overlooking the parking lot
- Restaurant tables with window view of parking lot or motorcycle parking near patio
- Secure parking areas away from cars and trucks
- Washing area with pails, rags and soapy water, mentioned and/or provided at check-in
- Installing a sign or plaque reading “Motorcycles Welcome”

Motorcycle tourists seem to have no clear preferences for lodging options while on a vacation touring trip. Instead, during the ten to fourteen days they claim to be on motorcycle vacations annually, these tourists use a wide range of accommodation with considerable duplication:<sup>27</sup>

- 67% campgrounds
- 40% hotels
- 70% motels
- 51% homes of friends/relatives
- 13% B&Bs/other

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<sup>25</sup> Ontario’s Southwest Motorcycle Tourism Report, June 2011, pg. 21.

<sup>26</sup> Ontario’s Southwest Motorcycle Tourism Report, June 2011, pg. 22

<sup>27</sup> This is a voluntary, non-random study conducted among over 700 *beltdrivebetty.blogspot.ca* subscribers during 2007/2008. Information should be interpreted with caution.

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## WHAT WE DON'T KNOW ABOUT MOTORCYCLE TOURISTS

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To date, Research Resolutions has been unable to find statistics on the number or characteristics of riders who have travelled Northern Ontario's many motorcycle routes although the firm asked representatives of Northern Ontario's sub-regional tourism and economic development departments to supply what information they had on these tourists. In response to a series of questions about motorcycling tourism volume and characteristics in the jurisdiction, one representative provided a description that is likely indicative of other parts of Northern Ontario: *unfortunately, tourism marketers do not have the skills or resources to track this information.*<sup>28</sup> All the tourism professionals contacted confirmed that "hard data" on the North's motorcycle tourists is simply not available at this time.

Volumetric and diagnostic information about how many and which motorcycle tourists are on the region's routes would fill an important void for tourism operators and marketers.

If no measurement systems are in place to learn more about the people who are actually riding through Northern Ontario on their motorcycles, they should be considered for the near future.

- Is there a registration system to identify who is travelling these routes and a way to contact them for follow-up research (e.g., email addresses; phone numbers or mailing addresses)?
- Is follow-up research conducted among people who go to routes' websites?
- Do restaurants and lodging establishments along the routes record the number of motorcycle tourist customers they attract and collect any demographic or visitor satisfaction information from them? If not, could a system be put in place to collect this type of information and would tourism establishments be willing to share the information they collect with Tourism Northern Ontario for the benefit of the region as a whole?
- Online surveys among motorcycle club members might prove to be a viable tool for estimating how many riders have been to Northern Ontario and details of their experiences in the region. Such studies could also be used to estimate future potential demand for the North.

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<sup>28</sup> See Appendix for contacted representatives and the questions they were asked.

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## NORTH AMERICAN MOTORCYCLE SALES/REGISTRATIONS

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As noted in a study of motorcycle tourism conducted in Nova Scotia, for a sizeable portion of the market, motorcycle touring is the stuff of dreams – a post-retirement indulgence people can afford once they are empty nesters, have the financial wherewithal to purchase an expensive machine and have the time to take extended holidays. No wonder a severe economic downturn dampened many of these dreams: suddenly there was appreciably less discretionary income and a lot more worry about the future.

In this section, industry information on the recent history of motorcycle sales and registrations is provided. It lends some supply-side insights into the North American motorcycle market and depicts the extent to which this market is tied to general economic conditions. As the numbers indicate, during the 2008/2009 recession motorcycle sales fell dramatically on both sides of the border. Recovery from the steep downturn has been slow, with only marginal growth in sales over the past couple of years.

Those building tourism products for the motorcycle segment should consider how closely tied this market is to general economic conditions and the extent to which motorcycle purchase seems to be linked to consumers' discretionary spending.

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### CANADA

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According to industry association figures on sales of new motorcycles in Canada, the 2008/2009 recession had a major negative impact on sales right across the country (see Table 14). In Ontario, almost 21,000 new units were sold in 2007 but only 12,200 were sold in 2012 (-41%). The decline was not as precipitous in Quebec over the past six years (-19%).

The good news is that downturn appears to have levelled off, with both Ontario and Quebec experiencing marginal growth in sales between 2011 and 2012.

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#### ***In Good Times***

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*Aging baby boomers are indulging their interest in motorcycling and treating themselves to the bike of their dreams. This group includes early retirees and the semi-retired, which means that they have time for long-distance touring.*

Nova Scotia Department of Tourism, Culture and Heritage, *Emerging Markets Bulletin: The Motorcycle Touring Market, 2007.*

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**Table 14: Retail Motorcycle Sales by Province (New Units)**

Key Provinces	2007	2008	2008	2009	2010	2011	2012	% Change	
								2011 to 2012	2007 to 2012
British Columbia	14,015	13,446	14,718	9,885	8,792	7,112	6,911	-3%	-51%
Alberta	17,069	18,883	19,509	12,676	10,361	8,998	9,365	4%	-45%
Saskatchewan	2,282	2,677	3,074	2,606	2,073	1,787	1,853	4%	-19%
Manitoba	2,368	2,129	2,208	1,626	1,405	1,239	1,199	-3%	-49%
<b>Ontario</b>	<b>20,851</b>	<b>20,536</b>	<b>21,714</b>	<b>16,333</b>	<b>13,855</b>	<b>11,815</b>	<b>12,237</b>	<b>4%</b>	<b>-41%</b>
Quebec	18,335	17,646	20,397	15,033	15,371	13,743	14,777	8%	-19%
New Brunswick	2,355	2,244	2,311	1,675	1,453	1,090	1,131	4%	-52%
Nova Scotia	2,613	2,495	2,556	1,881	1,585	1,226	1,311	7%	-50%
<b>Total</b>	<b>82,022</b>	<b>82,482</b>	<b>89,390</b>	<b>64,087</b>	<b>56,975</b>	<b>48,660</b>	<b>50,545</b>	<b>4%</b>	<b>-38%</b>

Source: Motorcycle & Moped Industry Council, *Motorcycle, Scooter & All-Terrain Vehicle Annual Industry Statistics Report*, 2012

### U.S.A.

A similar decline in sales hit the U.S. during the most recent recession. Industry sources indicate that sales in on-highway motorcycles reached approximately 611,000 units in 2008 whereas only about 318,000 new units were sold in 2012 (-48% over four years). Paralleling sales data in Canada, despite the major downturn during the recession, there has been modest growth in sales recently, from 313,000 in 2011 to 318,000 in 2012 (+2%).<sup>29</sup>

### WHERE ARE MOTORCYCLES MOST POPULAR?

#### CANADA

The provinces with the largest populations – Ontario and Quebec – account for the largest volume of new motorcycle sales and registrations. Each of these provinces accounts for 3-in-10 of Canada's 647,000 motorcycle registrations. Alberta also supports a robust motorcycle market, representing close to 2-in-10 of Canada's registrations.

When contrasted with each province's share of the country's population, it would seem that riding motorcycles is somewhat *under-represented* in Ontario (38% population; 31% registrations) (see Table 15). Conversely, in Quebec (24% population; 29% registrations) and Alberta (11% population; 17% registrations) motorcyclists are slightly *over-represented* relative to these provinces' shares of Canada's population.

Even though there is some under-representation of motorcyclists in Ontario, this province still represents almost 200,000 registered riders – the largest number in the country. Quebec accounts for a further 180,000 and Alberta is home to about 107,000 registered riders.

<sup>29</sup> Motorcycle Industry Council (USA) quoted in <http://www.motorcycle-usa.com/2/15436/Motorcycle-Article/2012-US-Motorcycle-Sales-Tally-452-386.aspx>. Sales data are not readily available at the state level.

**Table 15: Share of Canada Motorcycle Sales (new)/Registrations (motorcycles/mopeds)**

	Population (2011)	Share of New Sales (2012)	Share of Registrations (2010)
British Columbia	13%	14%	9%
Alberta	11%	19%	17%
Saskatchewan	3%	4%	2%
Manitoba	4%	2%	2%
Ontario	38%	24%	31%
Quebec	24%	29%	29%
New Brunswick	2%	2%	3%
PEI	*	*	1%
Nova Scotia	3%	3%	3%
Newfoundland & Labrador	2%	3%	2%

Source: Motorcycle & Moped Industry Council, *Motorcycle, Scooter & All-Terrain Vehicle Annual Industry Statistics Report*, 2012; Statistics Canada, Cansim Table , 2010405-0004

### U.S.A.

Almost 8.0 million Americans have motorcycle registrations. They are spread across the entire country.<sup>30</sup> Not surprisingly, however they are particularly concentrated in states with, for the most part, year-around clement weather: California, Texas and Florida (see Tables 16, 17).

These markets may prove difficult to attract to Northern Ontario because of the vast distances involved in riding from a home in Texas, Florida or California to the North. Nearer markets that are likely better bets for the North include Wisconsin, Ohio, Pennsylvania, Illinois and New York followed by Michigan and Minnesota. As described previously, these same states contribute most motorcycle tourists to Northern Ontario (see Table 4).

**Table 16: Share of U.S. Motorcycle Registrations**

	Population (2011)	Motorcycle Registrations(2009)
United States	308,745,538	7,883,000
<b>Key States</b>		
California	12%	10%
Florida	6%	8%
Illinois	4%	4%
Indiana	2%	3%
Iowa	1%	2%
Michigan	3%	3%
Minnesota	2%	3%
New York	6%	4%
Ohio	4%	5%
Pennsylvania	4%	5%
Texas	8%	6%
Wisconsin	2%	5%

Source: U.S. Census

<sup>30</sup> See Appendix for a table listing all states' registrations.

**Table 17: U.S. Motorcycle Registrations and Licensed Riders in Key States**

	Registrations (2009)	Licensed Riders (2009)
<i>In Rank Order by Registrations</i>		
Pennsylvania	409,000	8.7 million
Ohio	386,000	7.9 million
Illinois	349,000	8.3 million
New York	345,000	11.3 million
Michigan	266,000	7.1 million
Minnesota	251,000	3.2 million

Source: U.S. Census

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## APPENDICES

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### PRIMARY INFORMATION SOURCES

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The primary sources of information used in this report include the following:

- Travel Activities & Motivation Study (2006), Canada, U.S.A.
- Ontario's Southwest Motorcycle Tourism Report, June 2011
- Understanding and Attracting the On-Road Motorcycle Tourism Market to Northern Ontario, The Strategic Tourism Development and Marketing Partnership for Northern Ontario, 2006
- Summaries of TNS Travel Intentions Survey, Ontario Regional Profiles contained in The Strategic Plan;
- TNS Regional Reports— RTO13A, 13B, 13C, RTO13 (2012);
- Rediscovering Northern Ontario: Partnerships for a Strong Tourism Industry, Northern Ontario Tourism Marketing Strategy, 2012-2017. Government of Ontario, 2012

### REQUESTS FOR REGIONAL INFORMATION ON MOTORCYCLE TOURISM IN NORTHERN ONTARIO

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Research Resolutions asked the following organizations to provide responses to a set of questions about motorcycle touring in their jurisdiction:

<b>Jurisdiction</b>	<b>Contact</b>
City of Temiskaming Shores	James Franks
Northeastern Ontario Tourism	Donna MacLeod
Manitoulin Tourism <sup>31</sup>	Shelba Millette
Algoma Country	Carol Caputo

#### Question Set

1. What systems are in place to gauge usage, rider characteristics and satisfaction with tours such as [name of specific regional motorcycle touring route]?
2. How many riders do your tours attract in a season?
3. Where do the riders live? Any other demographic characteristics?
4. What types of lodging do they use?
5. How many nights do they typically spend on their touring trip?
6. Any other diagnostic and/or attitudinal information including satisfaction with the experience.

Chris Hughes (BC HUGHES) was also contacted and supplied additional anecdotal information on motorcycling tourism and its measurement challenges.

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<sup>31</sup> Manitoulin Tourism had not responded to the information request prior to issuance of this report.

## US MOTORCYCLE REGISTRATIONS BY STATE (2009)

## Share of U.S. Motorcycle Registrations

	Population (2011)	Motorcycle registrations(2009)
<b>United States</b>	<b>308,745,538</b>	<b>7,883,000</b>
Alabama	2%	2%
Alaska	*	*
Arizona	2%	2%
Arkansas	1%	1%
California	12%	1*
Colorado	2%	1%
Connecticut	1%	1%
Delaware	*	*
District of Columbia	*	*
Florida	6%	8%
Georgia	3%	2%
Hawaii	*	1%
Idaho	1%	1%
Illinois	4%	4%
Indiana	2%	3%
Iowa	1%	2%
Kansas	1%	1%
Kentucky	1%	1%
Louisiana	1%	1%
Maine	*	1%
Maryland	2%	1%
Massachusetts	2%	2%
Michigan	3%	3%
Minnesota	2%	3%
Mississippi	1%	*
Missouri	2%	1%
Montana	*	2%
Nebraska	1%	1%
Nevada	1%	1%
New Hampshire	*	1%
New Jersey	3%	2%
New Mexico	1%	1%
New York	6%	4%
North Carolina	3%	2%
North Dakota	*	*
Ohio	4%	5%

**Share of U.S. Motorcycle Registrations**

	Population (2011)	Motorcycle registrations(2009)
<b>United States</b>	<b>308,745,538</b>	<b>7,883,000</b>
Oklahoma	1%	2%
Oregon	1%	1%
Pennsylvania	4%	5%
Rhode Island	*	*
South Carolina	1%	1%
South Dakota	*	1%
Tennessee	2%	2%
Texas	8%	6%
Utah	1%	1%
Vermont	*	*
Virginia	3%	1%
Washington	2%	3%
West Virginia	1%	1%
Wisconsin	2%	5%
Wyoming	*	*

Source: U.S. Census