



NEW ZEALAND
TRADE & ENTERPRISE
Te Taurapa Tūhono

MOUNTAIN BIKING IN CANADA

OCTOBER 2022



Introduction

BACKGROUND

CANADA IS HOME TO A STRONG AND VIBRANT MOUNTAIN BIKING COMMUNITY, WITH A WORLD CLASS NETWORK OF MOUNTAIN BIKE TRAILS ACROSS THE COUNTRY. WITH ITS VAST MOUNTAIN BIKING TRAILS, CANADA'S COMMUNITY OF PASSIONATE RIDERS IS GROWING AT A RAPID PACE. THE BIKING INDUSTRY, AND THE SALES OF MOUNTAIN BIKES AND ACCESSORIES HAVE GRADUALLY RISEN OVER THE YEARS WITH MORE AND MORE PLAYERS ENTERING THE MARKET.

THIS HAS BROUGHT THE ATTENTION OF THE SPORT TO THOSE NEW TO CYCLING, THE OLDER DEMOGRAPHIC AND FAMILY-ORIENTED RIDERS. THEREFORE, CANADA REPRESENTS A SIGNIFICANT MARKET FOR OUR CUSTOMERS IN THE OUTDOOR AND OFF-ROAD CYCLING SECTOR

PURPOSE

THIS REPORT AIMS TO PROVIDE NZ BIKING ACCESSORIES COMPANIES WITH AN OVERVIEW OF THE CANADIAN MOUNTAIN BIKING INDUSTRY AND WHAT THE OPPORTUNITIES MAY BE.

METHODOLOGY

THIS RESEARCH USED SECONDARY DESKTOP RESEARCH BASED ON PUBLICLY AVAILABLE SOURCES AND SUBSCRIPTION DATABASES.

REPORT SECTIONS

- 1) [MARKET LANDSCAPE](#)
- 2) [MOUNTAIN BIKER CONSUMER FEEDBACK](#)
- 3) [APPENDIX](#)

LIMITATIONS

THE INFORMATION PROVIDED IN THIS REPORT WAS SOURCED FROM SECONDARY DATA SOURCES. DUE TO THE NATURE OF SECONDARY RESEARCH, ALL VALUES AND FIGURES SHOULD BE TREATED AS INDICATIVE, RATHER THAN ABSOLUTE.

THE LATEST INFORMATION AVAILABLE AT THE TIME OF RESEARCH WAS USED, HOWEVER PRESENT VALUES MAY DIFFER.

MONETARY AMOUNTS HAVE BEEN SPECIFIED IN THE ORIGINAL CURRENCY AND YEAR CITED IN OUR RESEARCH.



MARKET LANDSCAPE

Half Of Canadian Homes Own At Least One Bicycle And Mountain Biking In Particular Shows Strong Growth Potential



Strong growth rate of the mountain biking sector and healthy accessories market confirms attractiveness of entrance into Canada.



HOUSEHOLDS THAT OWN A BIKE

53%



USE BIKE FOR COMMUTE

7%



MOUNTAIN BIKE CAGR (2020-2027)*

7.3%

Canada makes up 20.7% of the North America bicycle accessories market (US\$463 million)

However, Canadians Are Less Frequent Bicycle Riders vs Other Countries

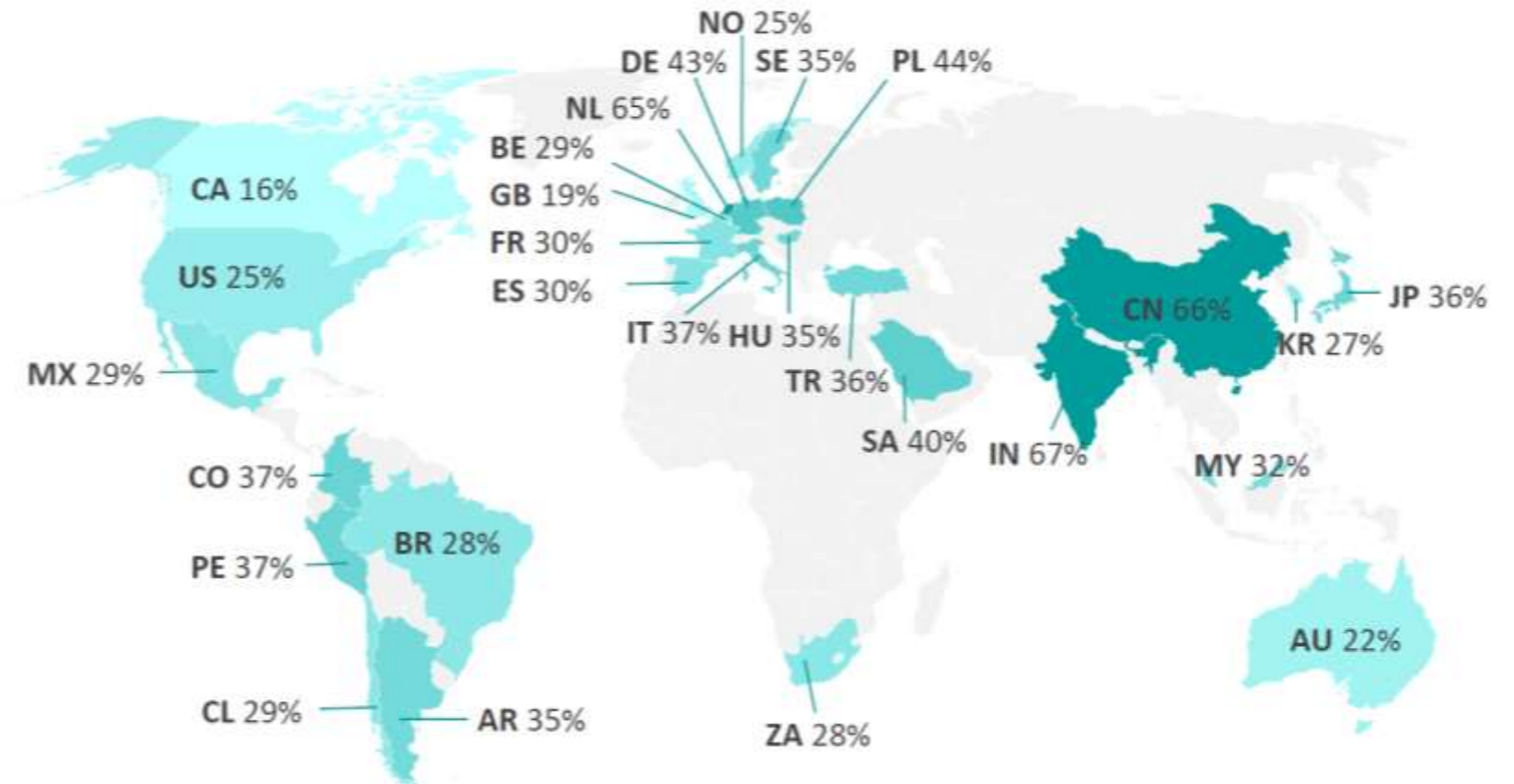


Canada's low biking rates may be attributed to road safety concerns among cyclists. Brands who want to play in the space may be well advantaged to provide positioning that boosts safety through their product usage or association.

16% of Canadian adults ride a bike at least once a week, the lowest among all countries surveyed. Deep winters could be a reason for average to be so low, however there are some perception factors that could be contributing to the low score.

- Almost half (48%) feel cycling in their area is dangerous. Feeling of cyclists being disrespectful to traffic rules and regulations as well as being a danger to pedestrians and automobiles.
- When asked about cycling infrastructure (bike lanes) 45% felt it was an excellent idea (Quebec residents 61%, BC 51%, Ontario 41%)
- Younger Canadians (under 35) support in greater numbers 49% new road and traffic infrastructure to support biking needs (vs 37% among the 35+ group).

% OF ADULTS RIDING ANY BIKE ONCE A WEEK



Four Provinces With The Greatest Chance For Success



When considering entering the Canadian market or expansion plans, British Columbia, Alberta, Ontario, & Quebec are the recommended Provinces.

	BC	Alberta	Ontario	Quebec
Sporting Goods Stores	672	629	2032	936
Cycling equipment and supplies stores*	152	37	168	198

British Columbia, Alberta, Ontario, and Quebec are the Canadian provinces with the most sporting goods stores and equipment & supply stores.

➤ Manitoba has fewer of each, 215 sporting stores and 13 equipment and supplies stores, while the remaining provinces have even less.

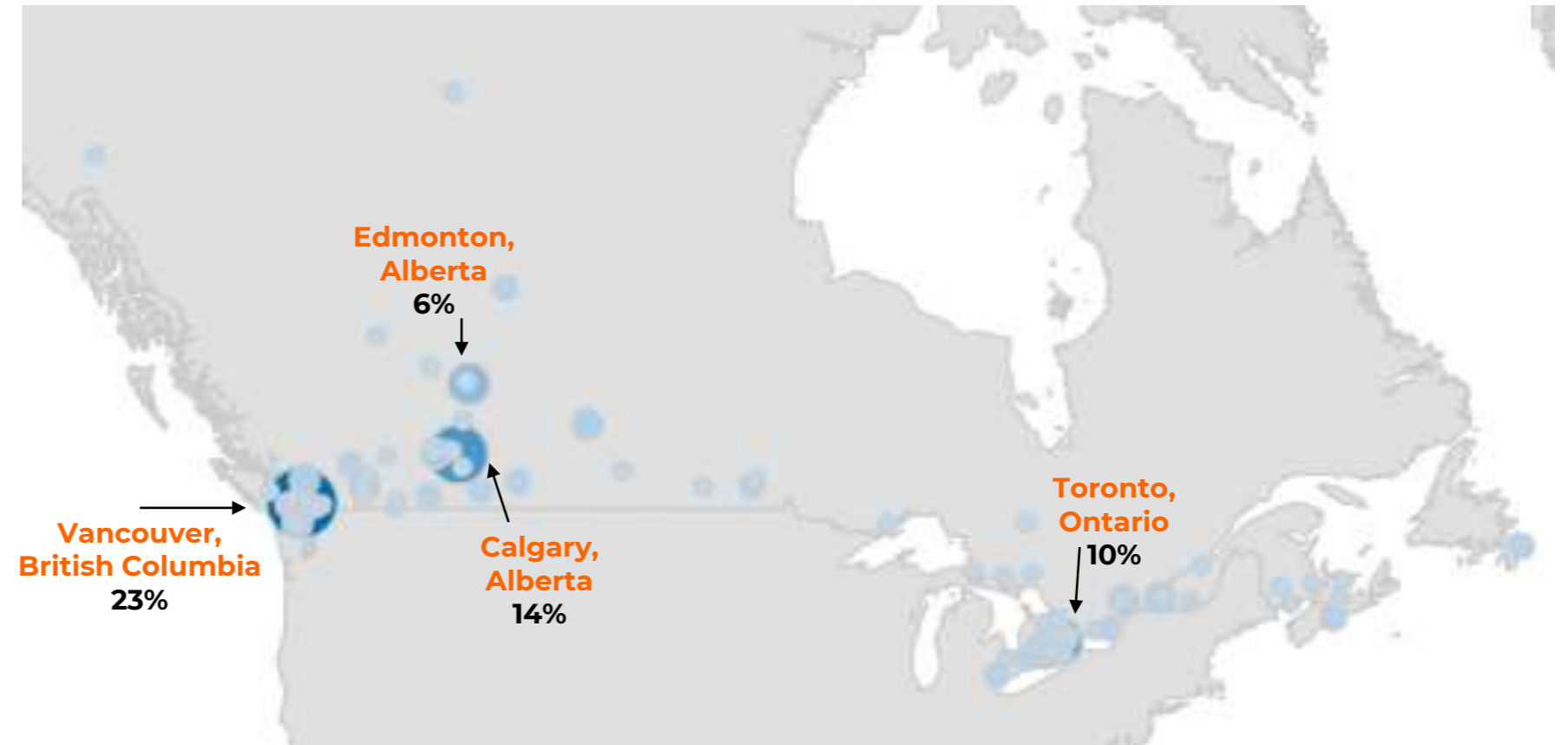
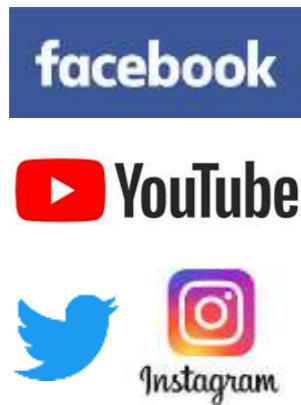


SOURCE: <https://www.statista.com/statistics/454745/number-of-cycling-equipment-and-supplies-stores-by-region-canada/> [* NAICS [Cycling Equipment and supplies specialty stores] - bicycle and bicycle parts dealers (except motorized), bicycle parts and accessories, bicycles, retail sales and repairs, new bicycles combined with repair, repair as primary source of receipts, retailing of used cycling equipment and supplies, and provision of repair services]. Sporting goods Store data (IBIS report – Sporting Goods Stores in Canada September 2022)

Vancouver Has Largest Cluster Of Mountain Biking Social Media Chatter (English Speaking)

Visually seeing conversation data provides the behavioral confirmation of some of the more mountain biking focal metros within Canada.

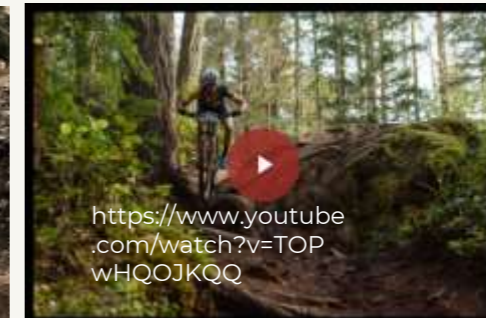
Vancouver, Calgary, Toronto, and Edmonton are key metros of social media & digital forum conversations about mountain biking.



Initial Entry Point - British Columbia Has Deep Roots In Mountain Biking

When thinking of an initial entry point into Canada for mountain biking accessories and apparel, British Columbia is the logical choice. British Columbia has a deep history in mountain biking and an active category culture.

- ❖ The Birthplace of Freeride
- ❖ 17,000 Trails Across Diverse Terrain
- ❖ Backcountry Biking – True Wilderness Experience
- ❖ 95% of Land is Available for Public Access
- ❖ Birth of Iconic Mountain Bike Brands
- ❖ World Famous Bike Events
- ❖ Mountain Bike Culture
- ❖ Top Professional Athletes
- ❖ True Wildlife Experience/Encounters
- ❖ Bike Parks & Festivals



British Columbia Is The Birthplace Of Many Mountain Biking Brands

British Columbia is the origination point of many popular mountain biking brands, contributing to the active mountain biking culture.



Crankworx is a multi-stop international event where the best mountain bike athletes participate in elite level competition. Originally began in Whistler, British Columbia 2004. New Zealand riders have done well at Whistler Crankworx (gaining much support from the New Zealand mountain biking brands present in Whistler).

Both Own Or Rent Options Exist For Electric Bikes

E-bike attraction and accessibility is growing. Further investigation into the category may be worth it for potential new growth opportunities.

What's an ebike Subscription?

Your own Ebike

Choose from our awesome ebike models - it's yours to ride home. Keep it for a month, or as long as you like. Pay from \$99/month.



Model Qx

from \$54/week
or \$129/month

Available now

Range: up to 70km
Gears: 8 gears
Lights: Integrated
Battery: Removable
Power: 5 levels
Weight: 19.5kg / 45lbs

ZyggCare

The best service in the industry. Hassle-free support just a click away. Includes maintenance, repairs, and home delivery.



Model Q2

from \$59/week
or \$159/month

Available now

Range: up to 120km
(180km with 3rd battery)
Gears: 8 gears
Lights: Integrated
Batteries: 2 Removable
(3rd available)
Power: 5 levels
Weight: 21.7kg / 48lbs

Theft Protection

Lock your bike securely & take a photo: your max liability if your ebike is stolen is \$1,000 or pay a bit extra for a max. \$350.



Model R

from \$59/week
or \$159/month

Available now

Range: up to 110km
Gears: 9
Lights: Integrated
Battery: Removable
Power assist: 5 levels
Weight: 27 kg / 60 lbs.

Voltbike List of Best Electric Bikes in Canada

	<i>Bike Category</i>	<i>Price (in C\$)</i>
Yukon 750 Limited	Fat Tire Bike	\$2199
Bravo	City / Road	\$2149
Outback	Full-Suspension	\$2199
Elegant	City / Road	\$2149
Yukon Core	Off-Road	\$2899
Urban Step-Thru	Folding	\$1749



Voltbike's model "Outback" is made for mountain biking. Fat tires, hydraulic disk brakes, and a powerful rear wheel.

Bikepacking Is A Newer Trend Creating Its Own Accessory Economy



Bikepacking is becoming more spoken about and sophisticated (requiring many accessories for the activity), another potential category growth area.



Multi-day mountain biking, ultralight race & gravel, and expedition & dirt touring are 3 different styles of bikepacking.

Multi-day mountain biking makes up the core of bikepacking:

- Taking only the bare necessities
- A light bike for at least a 40-mile journey
- A single overnigher to a couple of weeks
- Near home or even a planned trip out

Multiple product categories encompass a bikepacking trip, where more and more brands are entering the market

- Water
- Food/kitchen
- First Aid
- Bike repair kits
- Sleeping gear
- Wash & clean-up/change of clothes



**MOUNTAIN BIKER
CONSUMER FEEDBACK**

Trek, Canyon, And Fox Racing Are Top Brands (Among Mountain Bikers)

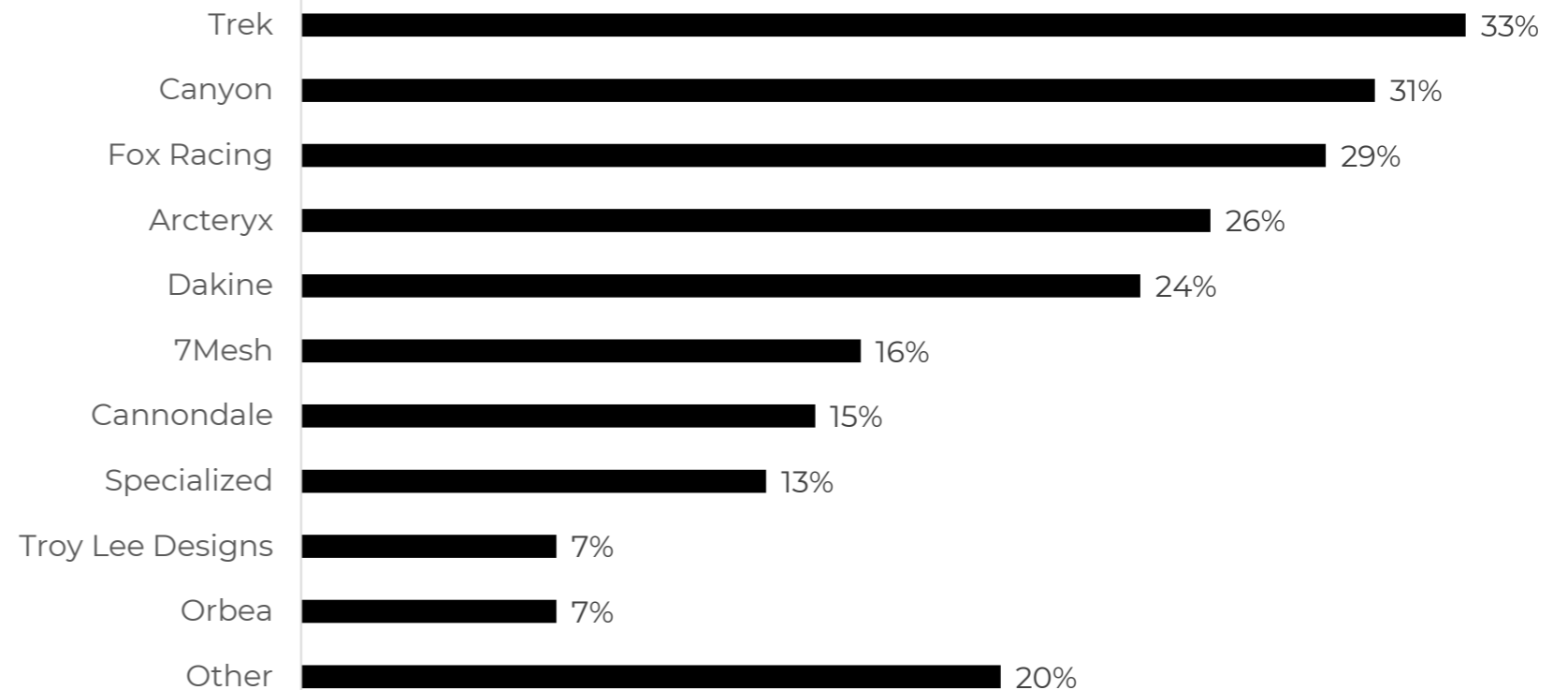


These are the brands mountain bikers are already purchasing. Exploring the brands will provide some insight into who the Canadian target customer might be, and a window into current pricing/feature market offerings. (NZTE can connect you with agile research vendors that can help you test and further refine who your ideal customers are and how to meet their specific needs)

- Trek, Canyon, Fox Racing, Arcteryx, and Dakine are top tier purchased brands, for bikes, bike apparel, and bike accessories.
- 7Mesh, Cannondale, Specialized, Troy Lee Designs, and Orbea are among the second tier brands.
- Trek & Canyon are top bike brands.
- Fox Racing and Arcteryx top apparel.
- Men are more likely to be Arcteryx buyers (**male 33% vs female 19%**).



Brands Purchased



SportChek & Amazon Are Top Retailers (Among Mountain Bikers)

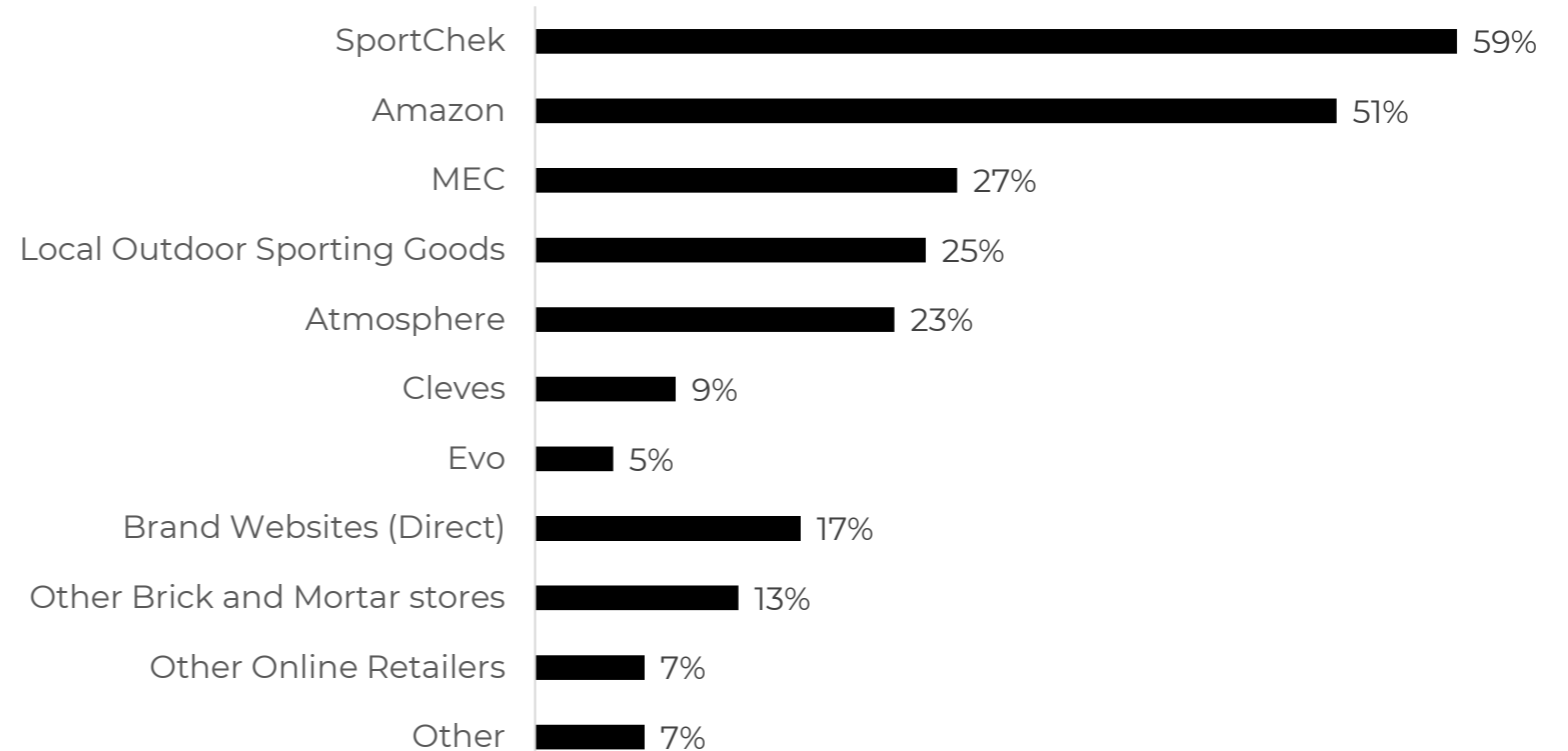


Retailers to consider for product distribution. Both SportChek and Amazon.ca offer a variety of mountain bike options along with apparel and accessories but are the larger retailer options. MEC and Atmosphere are two of the smaller specialized distributors to consider.

- Slight male skew with SportChek (**male 65%** and **female 53%**) and Atmosphere (**male 29%** vs **female 17%**)
- While woman skew more with local outdoor sporting goods stores (**male 17%** vs **female 33%**), and individual brand websites (**males 13%** vs **female 21%**).



Top Retailers Shopped At



Strong Adoption Of Health & Wellness Technologies (Among Mountain Bikers)



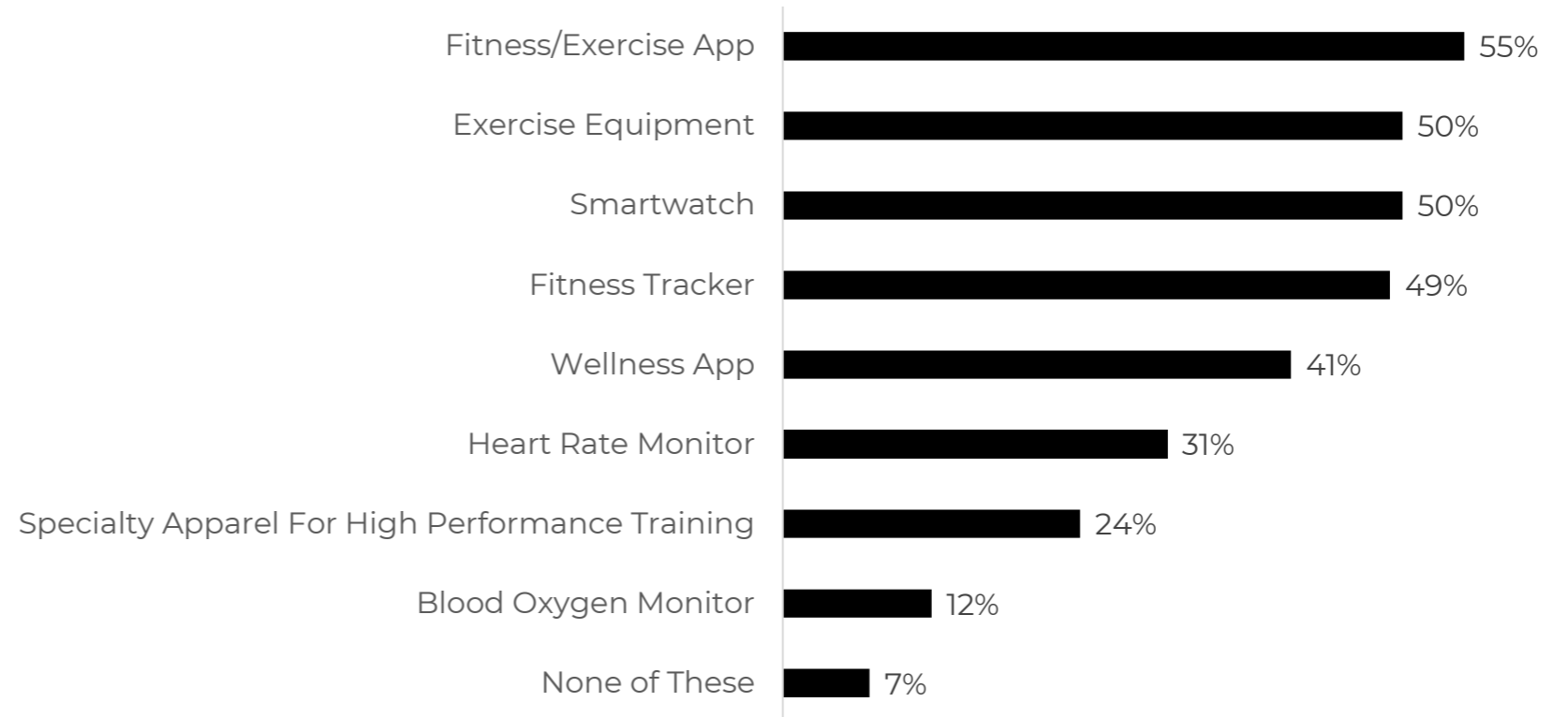
Mountain bikers are buying tech products to aid in their health and fitness, which should bode well for the mountain biking accessories category. Explorations into potential partnerships, in-house and co-lab opportunities, might be worth considering.

Fitness/exercise apps, exercise equipment, smartwatches, and fitness trackers are first tier of health and wellness adoption.

Monitoring tech like wellness, heart rate, and oxygen monitors make up second tier purchases.

Females show stronger tendency for fitness/exercise apps (**male 49% vs female 61%**), fitness trackers (**male 43% vs female 55%**), and heart rate monitors (**male 24% vs female 39%**).

Health & Wellness Tech Adoption



Health And Wellness Trends (Among Mountain Bikers)



Understanding consumer peripheral trends such as diet and activity can help with marketing copy development.

DIET TRENDS

"Maintaining a healthy balanced diet and lifestyle."
"Keto diet, superfoods"
"Updated my diet"
"Gym schedule and diet plan to lose or gain weight"
"Diet to gain weight"
"eating less during the day"
"Just eating healthy and exercising regularly seems to work fine for me."
"I tried marathon running and I really enjoyed it. I also tried vegan eating."
"eating healthy and walking"]
"I do intermittent fasting", "I have been learning more about intermittent fasting which I am going to try to become less fat"

ACTIVITY TRENDS

"Biking is well." "Biking and hiking is going wild."
"Running and biking. I want to do a triathlon at some point."
"Biking retreat where you spend the weekend in nature."
"Samsung health is a great tool I use for running everyday.",
"..competitive and vigorous exercise to promote good health"
"going out more often for walks and taking things slow"
"Running if I don't have much time. Otherwise hiking and camping has become my release."
"The health and wellness trends i found appealing recently are trekking and hiking in nature." "Free outdoor exercise"
"I tried marathon running and I really enjoyed it."
"I simply go to the gym and play adult rec-league sports."
"HIIT WORKOUTS"
"I have been doing yoga its been beneficial for my body doing stretching and clearing my mind"

Mountain Biking Posts Often Have An Adventure Element To Them



Adventure is a common organic theme when mountain bikers post outings. Authentic adventure stories may bode well for campaigns in Canada.

Are you on your best biking behaviour? 🚴
Check out our responsible mountain biking tips:
<https://t.co/YyYjwkvWhY>
#WorldBicycleDay
<https://t.co/LXTeRWWru0>



The 1,000 km Tree to Sea Loop is a newly established backroad system on the northern part of Vancouver Island. This bike packing adventure does require a water taxi from Tahsis to Zeballos. 🚴 Learn more:
<https://t.co/KAj9maYopJ>. 📷's shorebirdexpeditions, Instagram
<https://t.co/FkmzPeUWfB>



Ride the Rock is a new series that highlights the mountain biking community and spectacular trails here in NL. Check out all six episodes on Bell Fibe TV or YouTube.
<https://t.co/VVE7Mbdqe6>
<https://t.co/aPjbGwreZK>



Off on another #ebikepacking adventure. Heading east into bike sky country. #ebikes #yycbike
<https://t.co/ZRmNjVvt3p>



Road vs Mountain Bike Experiences Are Highly Searched



This information can be used to improve your SEO as well as better understand the mountain biker mindset.

ROAD VS MOUNTAIN BIKE

Which bike is best for road and mountain?
Can you use a mountain bike for road biking?
Can mountain bikes go as fast as road bikes?
Can I use a trail bike as a road bike?
What Features are important in a mountain bike?
Which is better, a road bike or mountain bike?
Is there a big difference between the two?
Is mountain biking harder than road biking?
Are road bikes faster than mountain bikes?
What are 3 benefits of mountain biking?

BRAND SEARCHES

MTB
Gravel bikes
Trek bikes
Hybrid bikes
Touring bikes
City bikes
What bicycle is best for mountain?
Is Trek a Canadian Company?
Does Trek make good bicycles?
Is Specialized a good bike brand?
Are Rocky Mountains good bikes?
Who makes the best mountain bikes in the world



**APPENDIX:
BRANDS, RETAILERS, ASSOCIATIONS, PODCASTS**

Brands



List of mountain biking related brands that often appear in social media.

	Details
www.altitude-sports.com	Apparel
www.outtabounds.ca	Bike, bike gear, accessories, apparel
www.thelasthunt.com	Apparel - website uniquely dedicated to discount outdoor clothing and equipment
Shop Wool Socks, Clothing & Accessories Smartwool Canada	Apparel
evo Mountain, Street & Water Community, Culture & Giving Back evo	Bike, apparel, accessories
Coast Outdoors - Paddle, Cross Country Ski & Onewheel Retailer - Coast Outdoors	Apparel
Local Supply Co.	Apparel, accessories
Rocky Mountain (bikes.com)	Bikes, apparel
Mountain bikes Trek Bikes (CA)	Bikes
https://www.giant-bicycles.com/ca	Bikes, gear, accessories
Bicycles Carbon & Aluminium Bikes CANYON CA	Bikes, gear, accessories
Marin Bikes Homepage	Bikes
Bikes – Raleigh Bikes (raleigh-canada.ca)	Bikes, gear, accessories
Norco.com	Bikes, gear, apparel, accessories
Homepage Specialized.com	Bikes, e-bikes

Retailers/Online



List of mountain biking retailers that often appear in social media.

	Details
Canada's Best Online Bike Shop Get Ready to Ride! (thebikeshop.com)	Calgary based ecommerce bike retailer
Bikes & Beyond - Winnipeg, MB (bikesandbeyond.ca)	Winnipeg based bike retailer
Bikes & Electric Bicycles - Bow Cycle Calgary, AB Bike Shop	Calgary based bike retailer
Bikes: Road, Mountain, Hybrid & Kids' Bikes - Decathlon Canada	Large sporting goods retailer
Trek Bicycle Store Victoria (trekbikesvictoria.com)	Locally owned and operated business offering multiple bike brands
Outdoor Gear Canada Sport equipment distributor - Cyclism, snowsports (ogc.ca)	Retailer sourcing site
https://www.hlc.bike/ca/	Catalog of bicycle accessories
https://www.livetoplaysports.com/	Live to Play Sports is a large Canadian wholesale distributor of premium bicycles, parts, and accessories
Adult Bikes - Women's Bikes & Men's Bikes Walmart Canada	Potential for mass number of eyes on product but not “mountain biking lifestyle” type retailers, so unique branding and specialty feel may not exist
Bikes Canadian Tire	Potential for mass number of eyes on product but not “mountain biking lifestyle” type retailers, so unique branding and specialty feel may not exist

Associations



List of Canadian mountain biking communities that often appear in social media.

	Details
Home - Vélo Canada Bikes (velocanadabikes.org)	To build a bicycle friendly Canada, for all ages and abilities, through knowledge mobilization, collaboration, and catalyzing change at the federal level. We will promote cycling as a powerful form of everyday transportation and recreation, and champion the bicycle's ability to provide health, environmental, economic and social benefits to society
Events - National Bicycle Dealers Association (nbda.com)	Webinars, events, programs related to bicycling
Canadian Cyclist - Homepage	Reviews, news, classified
Pinkbike Places	Provides bike shops, club, guides & tours, shuttle services, trail associations all by provinces with rating features.
Cyclists Read Canadian Cycling Magazine	Canadian mountain biking forums and reviews
About Us – BikeRadar (UK based but keeps showing up)	Reviews (bikes, components, clothing, shoes, helmets, maintenance, accessories)
Cyclingcanada.ca	National Sport Organization with one simple purpose: to share our love for cycling.
Visit The Show - BC Bike Show	Visit The Show - BC Bike Show March 4-5 2023
https://outdooradventureshow.ca/vancouver-exhibitor	Sits alongside the BC Bike Show. They exhibit at the same time in the same location, and travel to other major cities in Canada in tangent with the Bike Shows. It's a large D2C focused trade show and a landing spot for the consumers our companies are targeting.
Visit The Show - Alberta Bike Show (abbikeshow.com)	Visit The Show - Alberta Bike Show (abbikeshow.com) March 18-19 2023
https://vimff.org , https://whistlerfilmfestival.com	Film Festivals - good source for insights into the industry, the biking community in Canada (few online film options)
https://www.banffcentre.ca	Film Festivals - good source for insights into the industry, the biking community in Canada (few online film options)
International Mountain Bike Association - Canada	National organization that advocates for mountain bike and trail access across Canada.
Infrastructure Canada - Overview	Canada's Active Transportation Fund- \$400 Million over 5 years to support a modal shift away from cars and toward active transportation. Make travel by active transportation easier, more convenient and enjoyable, and enhance user safety and security. Encourage people to choose active transportation over personal vehicles (including supporting walking and cycling to access transit)

Podcasts



List of podcasts that have an audience frequently talking about mountain biking. Can help with potential partnership, advertising or collaboration opportunities.

	Details
Podcast Archives - Canadian Cycling Magazine	Conversations on Canadian cycling and cycling in general (The Vancouver-based adventure cyclist speaks about some striking differences between riding in America compared with Canada, as well as headwinds, riding on interstates and being a 'bikeochondriac')
Explore: A Canadian Geographic podcast on Apple Podcasts	Host David McGuffin talks to Canada's greatest explorers about their adventures and what inspires their spirit of discovery.
Podcasts Archive - Outside Online	Adventure Stories, many extreme adventures
Bicycle Talk on Apple Podcasts	Call-in talk show about bicycling, health, advocacy, racing, fitness, and lots for the general enthusiast!
The BikeRadar Podcast on Apple Podcasts	BikeRadar delve into the world of road and mountain biking to bring you the best tech content in cycling.
Podcasts Articles - Pinkbike	All about mountain biking culture and practical help
Vancouver Island Time on Apple Podcasts	Wondering what life is really like on Canada's wild and crazy west coast? This podcast is all about the people, the place's and Vancouver Island Time.



METHODOLOGY: NAM NZTE used a SAAS social media research tool to understand visitation of podcasts based on interest in specific topics.

Primary Terms searched: My audience frequently talks about mountain biking

Vendor Used: <https://sparktoro.com/>



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