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**BRIDGING THE DIVIDE: FRAMING AN INDUSTRY-ACADEMIA
COLLABORATIVE RESEARCH AGENDA FOR CYCLING SPORT TOURISM
EVENTS**

Abstract

Purpose: In sport tourism, an undeniable recent participation trend is the gravitation of amateur athletes to participatory sport events, particularly cycling sport tourism events. This trend presents numerous policy, applied, and scholarly opportunities and challenges. Contemporary trends are identified to guide future research addressing cycling sport tourism events.

Design / approach: This is a collaborative initiative between a major global sport event management organisation and established sport tourism scholars. Industry data is drawn upon to identify contemporary sport event participation trends and thus inform a future research agenda.

Findings: This paper draws upon industry data and insights to tease out five emerging trends in the participatory sport event sector which scholars should engage with.

Research Limitations / Implications: Due to the confidential nature of the company data, there were restrictions in the detail which could be reported.

Practical Implications: Increasing growth in premium quality, physically challenging cycling sport tourism events is analysed. A five-pronged future research agenda is proposed to address contemporary sport event management issues around measuring event impacts; strategic management of events; and leveraging globalisation and emerging markets.

Originality / value: Based on trends identified in this paper, theoretical concepts are drawn upon to propose a timely, industry-relevant future research agenda into cycling sport tourism events.

Keywords: Industry-academia collaboration; cycling; event management; amateur athletes; social worlds; serious leisure.

Introduction

Increasingly, neoliberal imperatives within modern universities are encouraging researchers to engage more closely with external stakeholders relevant to their discipline (Ball, 2012). In this sense some governments keenly point out a responsibility of the academy to contribute to solving topical problems and responding to contemporary trends in contrast to exclusive concerns with abstract theory testing and development (Universities Australia, 2018). Consequently, across the spectrum of academic disciplines and within strategic vision documents published by a multitude of universities globally, there have been calls for greater collaboration between industry and academia (Ankrah & Al-Tabbaa, 2015). This paper is a direct response for heightened collaboration between industry practitioners and scholars to better understand emerging trends and industry-relevant future research themes within the context of participatory sports events.

Participation among amateur athletes competing in sport events has grown significantly over the past decade, particularly in competitive endurance sports such as distance running, triathlon and cycling (Lamont & Kennelly, 2012; Shipway & Holloway, 2016; Shipway, King, Lee, & Brown, 2016). Demand for, and supply of participatory sport events continues to flourish in many countries. It is estimated that in 2016 there was growth of 13% per annum in marathon running events in the USA and significant increases in markets such as China, Russia and the Philippines (Shipway & Holloway, 2016). This growth is replicated in the sport of triathlon where the largest global brand, Ironman, will stage an estimated 298 branded events globally in 2018 including 41 full Ironman distance events, and 156 events over half the designated Ironman distance (Ironman, 2019). In 2015, there were over 4,300 registered and sanctioned triathlons in the United States and there has been recent growth across Asian and South American markets

including Peru, Chile, Argentina and Ecuador (runtri.com, 2018). However, the emphasis of this positioning paper is specifically on cycling sport tourism events catering for amateur cyclists, and their potential future shaping of active sport tourism markets.

Flowing from the recent proliferation of demand for and supply of participatory sport events, the focus of this paper is the emerging cycling sport tourism events segment (e.g., Buning & Gibson, 2016a, 2016b; Lamont 2014b; Shipway et al., 2016). In doing so, we draw upon industry data and insights gleaned through collaboration with a major global sport event management organisation which runs an increasingly popular model of cycling sport tourism events known as Haute Route™. Haute Route events provide opportunities for amateur cyclists to experience quasi-professional, multi-day cycling events modelled off professional cycling stage race events. Haute Route events are typically staged in places imbued with cycling significance such as the mountainous routes commonly traversed by global cycling mega-events including the Tour de France and Giro d'Italia. Thus Haute Route events are extremely physically challenging and are marketed as appealing to those seeking a lofty sense of physical achievement. They also offer shorter format events that cater for cycling tourists who value the safety and social dimensions of their events. In 2005 Green and Jones proposed the term 'serious sport tourism' to describe travel to participate in serious leisure pursuits; the cycling sport tourism events addressed in this paper epitomise serious sport tourism.

This paper is timely and significant as it addresses a contemporary and strong trend in active sport tourism participation: significantly growing demand for challenge-driven cycling event experiences. We do not intend this paper to be a traditional scholarly piece. Rather, we seek to leverage industry knowledge for the dual purposes of enhancing applied practice and advancing theoretical understandings of event sport tourism participation. Drawing upon a

variety of in-house data, we present insights into Haute Route participant demographics, motivations, economic benefits for host destinations. We then conclude by exploring five emergent trends within the broader cycling sport tourism events segment, enfolding these industry insights into scholarly literature to propose a future research agenda for cycling sport tourism events capable of mutually benefiting both industry and academic imperatives.

Cycling sport tourism events

The focus of this paper is ‘road cycling’ of which the primary event-based sub-disciplines span road racing, time trials, and circuit-based criterium races. However, it is the proliferation of organised cycling events with entrenched values of participation and personal challenge over competition (Berridge, 2014), which is at the core of this paper. Known under an umbrella of varying semantic terms, these participatory events are referred to as ‘Gran Fondos’ (a term of Italian origin, meaning ‘big ride’), ‘sportives’ in the UK, and ‘cyclosporives’ in France. However, there are some specific differences that are discussed below.

In this discussion, the term ‘Gran Fondo’ is used for simplicity and consistency, to encompass one-day cycling events for amateurs with some element of competition and timing. Gran Fondos have become very popular in the last 10-15 years, particularly in Europe, North America, and Australia. These events take a multitude of forms, however, they usually share similar core characteristics. In terms of *distance*, Gran Fondos normally allow participants to ride a specific course with others. This normally involves three different distances (e.g. Long: 100 miles / 160km, Medium: 60 miles / 100km, and Short: 30 miles / 50km). In relation to *duration*, the majority of events are single day, however, several are multi-day ranging from 2-3 days up to 2-3 weeks, for more extreme events.

With regards to *timing*, first, some events are fully timed and participants ranked, akin to a race where there is competition and prizes linked to results. Participants may either benefit from a road/lane closure, a priority of way or some other form of traffic management. Second, some events are partially timed and ranked during specific segments. This is more common where the cost is prohibitive to close a road or a lane, or where timing may encourage dangerous cycling, such timing steep descents or segments involving busy roads. Third, some events publish riders' times, but do not provide a ranking and are listed only by surname, hence it is more difficult for riders to compare their times. Finally, other events are non-competitive and are untimed and unranked, with participants concentrating more on social and fun elements or completing the event, rather than speed. In terms of *support*, some events are fully supported whereby participants have access to several refreshment points supplying food and drink; mechanical support; medical support in case of accident or emergency; and both volunteer and marshal support along the road for controlling traffic. Some events are partially supported which may have some but not all of the support listed above, whilst other events are non-supported, thus participants must be fully self-sufficient for the duration of event.

The earliest Gran Fondo events were not races per se, instead they were marketed as opportunities for large groups of riders to cycle en mass through places made famous by professional events such as the Tour de France, Giro d'Italia, Vuelta á España or one day 'Classics' such as Paris-Roubaix, the Tour of Flanders or Liege-Bastogne-Liege. Perhaps the oldest event of this type is *La Marmotte*, first staged in 1982 (Berridge, 2014). This event takes place in the French Alps over the same course each year, and includes four famous Tour de France mountain climbs. *La Marmotte* is regularly oversubscribed for the 7,000 annual entries. The *Cape Town Cycle Tour*, more widely recognised as the *Cape Argus*, claims to be the largest

timed cycling event in the world and in 2018, its 40th year, attracted nearly 40,000 riders from around the globe. The continued growth in cycling sport tourism events has been significant in the last decade with additional globally acknowledged large events including *Ride London* (established 2013), with nearly 80,000 participants over one weekend of festivities, formed in 2013, and *Gran Fondo New York* (established 2011). For example, Gran Fondo New York (2018) lists over 200 events in the United States; however the majority of smaller local and regional events are not advertised nationally.

The cycling sport tourism event market has also experienced recent expansion in South and Central America and Asia, partially replicating trends within distance running and triathlon, with new events emerging in Mexico, Taiwan, China, Japan, and Chile (Haute Route, 2017). In the UK, cycling participation has grown rapidly and British Cycling, the sport's governing body, shows a licensed membership growth from 50,000 in 2012 to over 125,000 in late 2016 (British Cycling, 2018). *L'Etape du Tour*, one of the most famous Gran Fondos was first run in 1993. In 2017 it listed 72 nationalities amongst its 15,000 participants. Similarly, Haute Route cycling events have hosted cyclists from over 50 different nations since their inception. A selection of high profile single and multiday Gran Fondos is summarised in Table 1.

Insert Table 1 Here

Cycling sport tourism events are, arguably, significant catalysts for tourism, with large numbers of amateur cyclists reported as traveling to participate in cycle sport tourism events. For example, *L'Etape du Tour* attracts approximately 15,000 participants annually, whilst the *Paris-Roubaix Challenge* attracted 4,500 participants in 2016 from 45 different countries, with 37%

being British, 16% Dutch, and 11% being French. In contrast, whilst Haute Route events had over 2,000 riders completing an event in 2017, only 19% lived in the host country, indicating that 81% of participants travelled abroad to compete, with 27% travelling from a different continent (Haute Route, 2017). The sport tourism development implications of these travel patterns and the potential for future market developments are clearly encouraging for host destinations.

Research which has examined participation in cycling sport tourism events have suggested such events can be perceived by amateur cyclists as spaces of sporting significance which promote a sense of collective belonging (Brown, Lee, King, & Shipway, 2015; Fullagar & Pavlidis, 2012). Previous academic work has identified that riding through iconic cycling spaces, such as the mountainous roads of the Tour de France, cycling tourists may experience feelings of existential authenticity and develop more empathetic and embodied connections with the feats of their sporting heroes within places imbued with touristic significance within the social world of cyclists (Lamont & McKay, 2012; Palmer, 2010). Lee, Brown, King, and Shipway (2016) have suggested that active engagement with the *eventscape* through co-created experiences are various, value rich, and personal. The concept of constructive authenticity (Wang, 1999) has relevance in explaining the authenticity projected onto toured objects by tourists or tourism producers in terms of imagery, beliefs, preferences or expectations. For example, a cyclist might be exposed to mediatised representations of a cycling place by watching one of cycling's 'Grand Tours' (e.g., Tour de France, Giro d'Italia) on television or through reading cycling magazines. In doing so, they construct mental images and preconceived expectations of those places, and thus the authenticity of a place is therefore subjectively constructed by the individual. For example, one of the Tour De France's most renowned mountain climbs, l'Alpe d'Huez, may be

perceived as an authentic cycling place due to its perceived difficulty and by virtue of the sporting feats that have played out on the mountain since its inception in 1952 (Wynn, 2018). Consequently, visiting that place then affords cycling tourists co-presence with the site where the individual's mental images of that place are reconciled with reality. The cycling sport tourism literature suggests that embodying these places through the kinesthetic act of cycling can heighten feelings of constructive authenticity felt by the participant towards the toured place/object (Lamont, 2014a).

Having outlined the background context and various forms of cycling sport tourism events, we now turn attention to reviewing the growth of such events, with particular emphasis on the Haute Route series of events.

Haute Route™ Cycling Events

Haute Route events, conceived in 2010, aim to provide amateur cyclists with an experience of being a quasi-professional cyclist riding a multiday stage race through some of the most challenging and iconic cycling terrain in the world. Although not explicitly marketed as races (nor officially sanctioned as racing events by cycling's governing body, the Union Cycliste Internationale (UCI)), Haute Route events are both timed, ranked, and prizes are awarded for those riders topping their categories. They are fully supported events and seek to mimic the experience afforded to professional cyclists undertaking multi-day stage races, through features such as the daily depart village and post-stage massages. As such, amateur cyclists pay a premium participation fee to facilitate employment of medical staff, security, police, safety, and refreshment personnel, as well as hundreds of volunteers and marshals along the course. Each event normally attracts between 300 and 600 riders from all over the world (Haute Route, 2018).

The inaugural event, a 7-day event across the French Alps from Geneva to Nice in 2011, was followed by the addition of other 7-day events in the Pyrenees (2013), the Dolomites and Swiss Alps (2014), and the Colorado Rockies (2016). Shorter 3-day format events based in one location proved popular and events in 2018 included eight different locations including Asheville, San Francisco and Cedar City (United States), Bormio and Predazzo (Italy), Bedoin and l'Alpe D'Huez (France), and Stavanger (Norway). New events in Oman and Mexico respectively were added to the event calendar for 2019. The strategic aim of the organisation is to continue this expansion given evidential increasing international demand for cycling sport tourism events among serious amateur cyclists.

The 7-day events cover a total distance of between 500 and 600 miles (800-960km), with participants usually cycling from point to point each day, climbing approximately 20 'cols' (long and high mountain passes), and travelling a distance of 70-90 miles (112-144km) each day. A typical Haute Route event consists of five mountainous stages including one 'queen' stage, the most difficult stage characterised by a gruelling distance and/or significant elevation gains, and one individual time-trial. The 3-day events usually cover a total distance of between 150 and 200 miles (240-320km), with participants based in one specific location for the duration of the event. Cyclists will usually climb five to six cols over the 3 days, travel a distance of 70-90 miles (112-144km) each day, and these events normally consist of two mountain stages and one time-trial. Consequently, a defining characteristic of Haute Route events is their extremely physically challenging nature; completing a Haute Route event is a significant mark of athletic achievement for amateur cyclists. The events provide participants with the accumulation of knowledge, behaviours and skills that help to demonstrate their own cultural competence and social status or standing within the cycling social world (Bourdieu, 1984; Shipway, Holloway & Jones, 2013).

On average, participants pay an entry fee of around £1,200-£1,500 (US\$1,550-\$1,930) for the 7-day events and £500-£700 (approximately US\$640-\$890) for the 3-day events (Haute Route, 2017). Entry fees do not include accommodation and participants either choose to purchase accommodation via the event organiser, via a tour operator (who adds additional services to the event including accommodation, massage, physiotherapist, and bike mechanics), or they arrange accommodation themselves. As such cycling sport tourism events such as Haute Route have commodified cycling sport tourism experiences. They fit the criteria identified by Beedie and Hudson (2003) that facilitates this commodification: a deferring of control to experts; a proliferation of promotional media; and the application of technology in sport and adventure tourism settings. Event organisers, like Haute Route, are able to provide packaged experiences that reduce the burden on participants who are themselves no longer required to fully research destinations, cycling routes, accommodation, access to food, or how to overcome cultural, logistical and language challenges.

Data sources

The information presented in the ensuing sub-sections is the product of post-event surveys administered to Haute Route event participants, analysis of data gleaned from event participant entry databases, and strategic market analysis conducted by Haute Route organisers (Haute Route, 2017). It should be noted that due to the confidential nature of the company data, there were restrictions in the detail which could be reported. The authorship team of this paper consisted of three authors: two academics widely published in sport tourism studies, while the lead author was a senior strategic director of Haute Route Events. The two academic authors were not able to access the raw data nor participant entry databases, though were given access,

on a strictly confidential basis, to a precis document of the data which were collected and analysed between 2011 and 2017 (Haute Route, 2017). The post-event surveys were designed to explore Haute Route event participants' reasons for participating, visitation characteristics, and expenditure patterns. These post-event evaluative surveys were primarily intended to facilitate enhanced event delivery based on participants' feedback, and also to obtain information regarding participants' demographic characteristics to aid organisational marketing and sponsorship procurement functions.

The questionnaire was developed internally by the Haute Route organisation, without academic input, and refined over time based on internal organisational requirements. Survey data collected included expenditure estimates, demographic information, cycling participation and behaviour characteristics, motivations for participating in Haute Route events, and satisfaction with various elements of the Haute Route event offerings. The surveys also invited open-ended feedback on the participants' event experiences. Each Haute Route participant received an email invitation to complete the survey online after their respective event. Insights presented within this paper are drawn upon survey data from every Haute Route event between 2011 and 2017 (total 19 events) and have historically yielded an average response rate of approximately 37%. Survey data were analysed in-house by Haute Route staff, who performed descriptive analysis by exporting the electronically-collected data from the web survey platform into Microsoft Excel. As the Haute Route staff who conducted the analysis were not trained in advanced statistics, analysis was restricted to basic univariate descriptive statistics on the individual variables. The precis document also contained strategic market analysis conducted internally by Haute Route staff in relation to their key competitors and broader external business environment (Haute Route, 2017).

The information gleaned through such surveys allows a glimpse into the target market characteristics of Haute Route event participants, though this data does contain inherent limitations. For example, the relatively low average response rate limits generalisability of the findings. Moreover, exploring event participants' motivations for participating in Haute Route events is based on arbitrary measures as opposed to being grounded within suitable human motivation theory. Additionally, the economic impact analysis conducted by Haute Route may not have factored in important requisites for producing accurate tourism-induced economic impact estimates as advocated by Crompton, Lee, and Shuster (2001) such as excluding responses from local residents and time switchers, along with ascertaining travel party size.

Upon examination of the precis document, the three authors met multiple times face-to-face and online to discuss the survey data and strategic market analysis outcomes. During these discussions, the two academic authors sought to iteratively clarify with the senior Haute Route director, the broader implications of the survey data combined with Haute Route's strategic market insights (Haute Route, 2017). From these discussions, five emerging trends pertaining to cycling sport tourism events were distilled, which are discussed in the ensuing sections of this paper. Additionally, the two academic authors met several times to discuss how the practitioner data and market insights linked with the scholarly literature discussing sport tourism participation and management. It is through these theoretically-focused discussions and iterative consultation with the relevant literature that that the five trends were arrived at, and our industry-relevant future research agenda for cycling sport tourism events was formulated (refer to Table 2).

As highlighted above, event management organisations typically lack internal capacity to collect data befitting of publishable academic standards; nevertheless, post-event surveys are

crucial for event management organisations in garnering feedback from participants and aligning future event offerings with demand-side expectations (Allen, O'Toole, McDonnell, & Harris, 2002). An area where industry-academia collaboration in the participatory sport event space can make a substantial contribution is in assisting industry practitioners to collect rigorous data. Doing so may not only help inform more effective product development, but also in examining emerging participation trends. Despite the limitations that can belie industry data, this information may be useful in indentifying germaine future research avenues that are of value to practitioners and scholars alike.

Demographic overview of Haute Route event participants

Close to 10,000 participants will have completed an Haute Route in either the 7 or 3-day format by the end of 2018 (Haute Route, 2018). Registration data indicates that the gender distribution for participants is 88% Male and 12% Female. Over 50 nationalities are represented. The top nationalities are the UK (28%), France (12%), US (7%), Canada (7%), Australia (7%), Switzerland (5%), Brazil (4%), and Mexico (4%). The fastest growing markets are Brazil, Taiwan and Mexico. Haute Route participants average approximately 5,000 miles (8,000km) on their bikes each year, and 55% of the riders return to complete more than one Haute Route event. The average age of participants is 44 and their mean annual income was approximately £120,000 (US\$152,000). Further, 15% of respondents earned more than £250,000 per annum (Haute Route, 2017), suggesting Haute Route participants are predominately from higher socioeconomic backgrounds.

The majority of riders in either the 7-day or 3-day format travel from outside their home country to participate in Haute Route events. This figure stood at 78% in 2017, and is consistent

across both formats. In 2017, over one quarter (27%) of the cyclists travelled to a different continent to participate in Haute Route events, of which 35% travelled to a different continent for the 7-day events versus 13% for the 3-day formats. Approximately 50% of riders were first time participants in a 7-day Haute Route in 2017, whereas nearly two thirds of riders, 64%, were participating in the 3-day Haute Route for the first time (Haute Route, 2017).

Contemporary Trends in Cycling Sport Tourism Events

Based on Haute Route organisers' observations across their portfolio of cycling events, we suggest that there are five emerging trends within the cycling sport tourism events market that may present a range of applied and academic opportunities and challenges in coming years. These trends include (1) the potential for mobile event modalities to yield enhanced economic impacts for host destinations; (2) heterogeneity in cycling sport tourism event participants; (3) marginal increases in women's participation, despite a still significant gender divide in cycling event participation; (4) increasing demand for new places and innovative event concepts; and (5) the impact of globalisation and emerging geographic markets. Table 2 summarises the five identified trends along with suggesting topical future research questions and theoretical concepts pertinent to each trend. The ensuing sub-sections unpack each trend in detail along with associated future research opportunities.

Insert Table 2 here.

Trend 1: Mobile event modalities and their economic contribution to host destinations

Host cities, regions or communities can benefit via direct economic expenditure associated with cycling sport tourism events and potential repeat visitation by event participants. (Bull, 2006; Bull & Lovell, 2007). Haute Route cyclists and their supporting entourage such as family members and friends, along with event personnel, all contribute to host destination economies through purchasing accommodation, food, drinks, souvenirs and cycling-related goods. Importantly though, cycling sport tourism events such as Haute Route are distinct from many other sport tourism events by their mobile nature. That is, the event, its participants and entourage, along with associated infrastructure move from one host community to another on an almost daily basis. This is in contrast to many other sport tourism events which feature a central locality for the event's duration. The mobile nature of Haute Route events therefore raises some important questions with regard to the disbursement of economic impacts across geographic space.

Economic impact estimates conducted by Haute Route organisers on both 7-day and 3-day Haute Route events in 2016 and 2017 show the following results. Each 7-day event has both a start and finish location where participants arrive either a few days prior to the event or stay a few days afterwards. Previous Haute Route start and finish locations have included Geneva (Switzerland), Nice (France), Anglet (France), Toulouse (France), Innsbruck (Austria), Venice (Italy), Boulder (USA), and Colorado Springs (USA). Moreover, each 7-day event passes through several cities or towns which serve as stage start and/or finish points. Participants typically stay one night in each of these locations, thus assisting with dispersing the economic benefits of Haute Route events across a wide area as opposed to concentrating new expenditure in one particular location. Additionally, Haute Route stage start/finish towns are typically smaller

towns with a high dependence on winter-based tourism. As such, it is plausible that cycling sport tourism events can assist with addressing the seasonality challenges faced by destinations (e.g., Pegg, Patterson, & Gariddo, 2012).

Following on from the discussion above, the timing of Haute Route events is also significant and directly related to each event's economic impact potential, especially considering the issue of tourism seasonality. The actual timing of each individual event is subject to a wide variety of variables such as gaining regulatory approval from relevant authorities in each host community along with availability of a critical mass of suitable accommodation capable of housing each event's mobile entourage. However, Haute Route does endeavour to time each individual event strategically, so as to maximise an event's economic benefits to its host communities. This is achieved through staging events during shoulder seasons when demand and tourism services and infrastructure is much lower than peak season. Indeed, earlier writings on sport tourism events advocate strategic timing of events as a useful means of optimising economic benefits for small-scale events (e.g., Daniels & Norman, 2003; Walo, Bull, & Breen, 1996). Further, hosting cycling sport tourism events during shoulder seasons can provide significant economic benefits to host regions that are heavily dependent upon winter-based tourism, such as alpine regions. However, given that cycling is an outdoor sport heavily influenced by climatic conditions, it is essential to strike a balance between staging events at times when demand on tourism services and infrastructure is not at its peak, weighed against staging an event during times of year when climatic conditions are favourable for cycling. To overlook this consideration may prove commercially imprudent as potential participants may be discouraged from entering an event if prevailing climatic conditions (e.g., snow, icy roads) at that time of year are likely to produce dangerous and/or uncomfortable cycling conditions.

The estimated daily direct economic impact for each 7-day host location is £220,000 (US\$284,400) (Haute Route, 2017). Similarly, the 3-day event format is based around one location, and this allows participants to stay in the same hotel for several nights, whereby family and friends also tend to join the trip. The estimated daily direct economic impact for each 3-day host venue is £360,000 (US\$465,400) (Haute Route, 2017). The economic impact estimates calculated by Haute Route is the product of commercial in confidence data collection from post-event surveys administered to event participants. However, there are inherent limitations with the rigour of the economic impact measurements adopted to date, and the practitioner figures presented here must be viewed with extreme caution. As such, there is a clear need for research applying more and robust measures and economic modelling capable of accurately measuring the economic value of cycling sport tourism events, whilst also meeting publishable academic standards.

Relatedly, Haute Route events tend to take place outside of major metropolitan centres where road conditions and terrain are more conducive to safe and enjoyable cycling tourism experiences (Ritchie & Hall, 1999). Tourism has long been touted as an effective component of broader economic development strategies for regional areas because of its ability to generate income and employment by virtue of existing infrastructure and endowed resources (Butler, Hall, & Jenkins, 1997; Giaoutzi & Nijkamp, 2005). Daniels and Norman (2003) argue that participatory sport events feature attributes such as utilisation of existing infrastructure and low need for public funds, enhancing their ability to deliver favourable economic benefits to host destinations. While there is a great deal of previous research examining the economic impacts of sport tourism events¹, the economic contributions of mobile sport tourism events in regional areas, such as Haute Route, are much less well-understood. Future research should therefore

¹ Weed (2009) provides a critical overview of sport tourism economic impact research

unpack questions such as how do mobile event modalities assist with disbursing economic impacts across wider geographic areas? How do the economic impact of mobile cycling sport tourism events compare to other kinds of sport tourism events?

However, economic impacts are but one element of the triple bottom line approach to sustainability (Hacking & Guthrie, 2008). Further, event scholars are rightly casting a more critical eye on the impacts of a wide range of events on host communities (e.g., Collins, Jones, & Munday, 2009). In addition to better understanding economic impacts, future research addressing the social and environmental impacts of cycling sport tourism events is warranted, as this is an aspect of sport tourism research that has not received a great deal of attention to date. Thus, one future research question is, do mobile event modalities invoke fewer social and environmental impacts on host destinations, particularly given that such events tend to have a shorter duration within concentrated geographical places? Future research could also explore the social exchange value to host community stakeholder groups of hosting cycling sport tourism events.

Trend 2: Heterogeneity in cycling sport tourism event participants

Evidence gleaned from Haute Route data suggests that participants are heterogeneous in terms of their demographics, cycling practices, and motivations for participating in Haute Route events. Similar heterogeneity in cycling event participants has been observed in previous research (Lamont & Jenkins, 2013). Given that the cycling sport tourism event demand market is diverse, this heterogeneity presents both challenges and opportunities for event management organisations in terms of maintaining strategic competitiveness within the supply market, but also in meeting demand-side expectations.

Data collected through Haute Route post-event surveys suggest there may be distinct segments of participants who vary in their reasons for participating. Within the post-event surveys Haute Route participants were asked to indicate the degree to which they identify with a closed list of reasons for participating in Haute Route events. From this analysis it was evident that pockets of participants strongly endorsed reasons relating to competitiveness and performance achievements compared to others; others strongly endorsed reasons around social opportunities and camaraderie, although they were less attracted by competitiveness reasons; and there were also significant numbers of respondents who endorsed completion and exploration reasons far above competitiveness and performance reasons. Taken together, this data suggests that Haute Route event participants are far from homogenous in their reasons for taking part.

However, from an academic perspective, rigorous segmentation of the population of Haute Route participants based on the organisers' internal data is problematic. This analysis relied upon Haute Route's in-house survey methodology, with measures for participation motives being arbitrary and not grounded within any underpinning theory. Given this inherent limitation, there is a need for additional research adopting more rigorous foundations for segmentation of participants in cycling sport tourism events that would benefit event organisers and enhance theoretical understandings of event tourism participation. Lamont and Jenkins (2013) have pointed out shortcomings inherent within event segmentation studies, calling for more theoretically-informed research:

Previous segmentation studies conducted in the context of sports events have largely discounted individual participant's levels of experience, skill, knowledge, and physical ability and affect relating to the activity in which participants are engaged (e.g., running, cycling, and swimming). Such studies ... have thus arguably failed to adequately link the

demand dimensions of events (e.g., participants' needs, skills, motivations, and experiences) with supply dimensions (e.g., event setting, accessibility, and facilities).

This situation may be particularly problematic for events where factors such as physical ability, commitment to the activity, experience, skills, and knowledge can influence the quality of an event participant's experience (pp. 391-392).

Market segmentation is widely advocated as a useful marketing tool enabling purveyors of products or services to more accurately tailor offerings to supply-side characteristics.

Segmentation is advocated as necessary due to a prevailing assumption that consumers are not homogenous and therefore have differing needs which must be accommodated in product or service offerings (Dolnicar, 2002). Segmentation specifically refers to 'dividing a market into distinct groups of buyers with different needs, characteristics or behavior that might require separate products or marketing mixes' (Kotler, Brown, Adam, Burton, & Armstrong, 2007, p. 344). Theoretical concepts such as recreation specialization (Bryan, 1977) and enduring involvement (Laurent & Kapferer, 1985) have been advocated as multidimensional concepts suitable for tapping nuances amongst participants in active leisure practices, particularly cycling (Chen & Chen, 2012; Lamont & Jenkins, 2013; Ritchie, Tkaczynski, & Faulks, 2010).

We therefore suggest future research should examine heterogeneity amongst cycling sport tourism event participants using theoretical concepts such as recreation specialization and enduring involvement. These concepts may be deployed in exploring questions such as how and on what basis do cycling sport tourism event participants vary? What variables explain the greatest variance in heterogeneity amongst cycling sport tourism event participants? Addressing such questions may subsequently inform further explorations around how heterogeneity amongst event participants relates to their event preferences, as well as exploring implications

heterogeneity may have for event product design. Empirically-derived insights may draw attention to a need for event management organisations to offer tiered product structures and/or to develop multi-pronged product offerings if they are to gain and sustain competitive advantage in this market.

Trend 3: (Marginally) increasing women's participation, though still a gaping gender divide

Cycling sport tourism events and other amateur endurance sports events have experienced marginal growth in women's participation recently. Insights gleaned through Haute Route data and related strategic market analysis have identified a steady increase in the proportion of women in event fields. At Haute Route 7-day events, female participation increased from 8% in 2011 to 10% in 2017, whilst female participation at the shorter 3-day events stood at 14% in 2017 (Haute Route, 2017). Haute Route organisers forecast an increase for the above time frame to approximately 15% on the 7-day events and between 20 and 25% for the shorter 3-day events. In a related multi-day cycling sport tourism event context, the flagship event of another cycling sport tourism event organisation, Hot Chillee, is the *London to Paris* 4-day event; in 2017 females represented 13% of participants. For their *Cape Rouleur* 4-day event in South Africa, females constituted 19%.

Other market insights also point to marginal increases in female participation. For example, *L'Etape du Tour* (discussed earlier) exhibited 5% female participation in 2017, which rose from 3% in 2007 and from just 1% in 1997 (L'Etape du Tour, 2018). In South Africa, the *Cape Argus* event has seen female participation grow from 3% in 1978 to 12% in 1986, 17% in 1996, and is currently stable at around 20% female participation between 2006 and the present day (Haute Route, 2017). *Ride London*, the UK's largest one-day event taking place on closed

roads around London over the past five years began with women's participation levels at 18% in 2013, and has grown to a stable 24 -26% in recent years (Haute Route, 2017). Moreover, an increase in female participation has been observed in related participatory sport events. For example, in distance running this trend is reflected across all distances from 5km, such as the weekly *parkrun* series which have a majority of female participants, compared to the more established 26.2 mile (42.2km) marathon distance (Shipway, Holloway, & Jones, 2013).

It is arguable that the broader cycling social world has experienced a marginal shift from being exclusionary to women to more inclusive. Traditionally, media coverage of professional cycling races has prioritised men's events (Flottorp, 2019). However, over the past decade cycling's global governing body, the UCI, has worked to reduce inequities between men's and women's professional cycling by increasing the number of and coverage of women's professional races through initiatives such as the UCI Women's WorldTour, and establishing a women's advisory commission (UCI, 2018a). At a more local level, many cycling clubs now have women's teams and committees, and cycling is (slowly) becoming a more gender-inclusive sport. As recently as ten years ago, there was limited choice for women in terms of women-specific road bicycles and cycling kit. However, today most major bicycle manufacturers offer women-specific models and all of the largest clothing manufacturers produce a women's range. For example, Rapha, a well-known luxury cycling clothing brand, has seen its most significant growth over the last three years in its women's ranges, with over 100 pieces (Haute Route, 2017). It is therefore reasonable to suggest that women's participation in cycling sport tourism events will continue to increase in line with growth in other endurance sports over the coming five to ten years.

Whilst marginal growth in women's participation reported above is promising, the reality is that a gaping divide between men's and women's participation in active sport tourism remains. This gender inequity was first noted twenty years ago when Gibson (1998) noted that 'the overwhelming consensus is that the active sport tourist tends to be male, affluent, and well educated' (p. 56). In an introduction essay to a recent special issue of *Journal of Sport & Tourism* on active sport tourism, Gibson and her co-authors lamented that the sample descriptions of published active sport tourism studies since then suggest this gender inequity remains (Gibson, Lamont, Kennelly, & Buning, 2018). Consequently, there is a need for future research seeking to explain and redress the significantly lower numbers of female participants in cycling sport tourism events. For example, leisure constraints and constraints negotiation theory has been advocated as a prudent theoretical foundation for understanding barriers to sport tourism participation (Hinch, Jackson, Hudson, & Walker, 2005). These concepts could be fruitfully deployed to better understand, and potentially dismantle, women's constraints to participation in cycling sport tourism events. Similarly, given one of sport's cultural functions as a traditional space for heteronormative masculinity (e.g., Messner, 1992), ethnographic work examining the playing out of gender in cycling social worlds may shed light on men's discursive practices which may potentially discourage female participation.

Trend 4: Increasing demand for new places and innovative event concepts

Increasingly, contemporary serious sport tourists are seeking out new and innovative event concepts (Hinch & Shintaro, 2018). The current market indicates a consistent number of riders competing in formal races in both the US and the UK, but without any significant growth and that potentially many riders are looking for new challenges. More recently in the cycling

event world, instead of taking part in a single day event, feedback from Haute Route cyclists is that more adventurous cyclists are seeking events lasting several days, or even one week or more. There is growth in events covering longer distances, sometimes referred to as *ultra-distance cycling*, traversing several countries or wide areas of remote land. Examples include the Transcontinental Race, Tour Divide, and Race Across America (RAAM). In terms of safety and security and perceived risks there have been notable incidents during ultra-distance cycling events including deaths, where participants push themselves to their limits over many days (Fry, 2017)..

New 'exotic' locations such as Sri-Lanka, India, Colombia, Bolivia and Brazil are emerging within the cycling sport tourism event landscape, and Haute Route has also added Mexico to their events calendar for 2019. Sports travel operators including notable industry players such as Rapha have similarly reported consistent demand for new and exciting destinations (Haute Route, 2017). It is therefore likely that cyclists will continue to demand more endurance cycling sport tourism events that are of high quality in terms of organisation, route, excitement, exploration and challenge, but also that allows them to participate without being either in a 'mass' field of thousands of other competitors or going without support such as medical teams, refreshment points, and road marshals. We therefore suggest that cycling sport tourism event participants are generally attracted to challenging events, albeit within an environment that provides some support and is relatively 'controlled'.

To contextualise the discussion above within a scholarly perspective, we suggest the concept of a 'social world,' embedded within broader social theory, is an appropriate starting point (Unruh, 1979; 1980). It is important to better understand why participants are attracted to, and maintain commitment to a serious sport tourism pursuit such as endurance cycling, and to

achieve this, it is instructive to understand the social world in which participants become ensconced. A social world is a concept adapted from symbolic interactionist sociology and requires conceptual modifications when applied to the context of cycling sport tourism events. Social worlds are not native to sport, tourism, event or leisure disciplines, and certainly did not emerge from the early exploratory fieldwork studies on sport tourism (Shipway & Jones, 2007; 2008). What those studies did illustrate was that the social worlds of serious sport tourists, including cyclists, are complex phenomena that require further investigation.

We suggest that what makes the social world surrounding cycling sport tourism events such as Haute Route distinct, is the central role that a perceived aura of sport heritage by cycling through iconic cycling places plays. Moreover, events such as Haute Route enable amateur cyclists to temporarily and vicariously perform as quasi-professional cyclists emulating their professional counterparts who have co-constructed epic sporting feats in the past (Lamont, 2014a). These iconic cycling routes, such as those in the French Alps, Pyrenees, and Italian Dolomites, are readily accessible *eventscapes* (Brown et al., 2015) where amateur cyclists can pursue serious sport tourism and embody the past achievements of their professional idols, as a central part of their identification with the activity of cycling. Events such as Haute Route plausibly allow amateur cyclists to symbolically follow in the wheels of their sporting idols, and through enacting the core activity of cycling on iconic routes and courses, they become better placed to appreciate the prowess and abilities of the professional athletes. As such, the practice of cycling becomes more than just a passive hobby (Stebbins, 2014), and their social identity is projected and collectively celebrated against a backdrop of place venerated as iconic within the cycling social world (Shipway et al., 2016). As such, we advocate future qualitative studies that explore cycling sport tourism events replicating the stage race model of professional cycling

through catering for serious, amateur cyclists. Such research would deliver enhanced understandings of the lived experiences of cycling sport tourism event participants and better explain their motives for participating in such events.

Indeed, for many Haute Route participants the notion of ‘collecting’ places, and relatedly, collecting event experiences is, arguably, a central motive (Shipway et al., 2016). We suggest that through these event experiences, amateur cyclists may become more knowledgeable about the social worlds and circumstances through which they acquire valuable and cherished experiences (Shipway & Jones, 2007), and develop a more sophisticated appreciation of the significance of each cycling sport tourism event. We therefore suggest additional research is required to better understand the extent to which amateur cyclists seek to ‘collect’ challenging cycling sport tourism event completions as achievement markers within their social world. Another pressing question is if and how accumulating a portfolio of event completions yields cultural capital which fortifies the participants’ standing within their social world?

Trend 5: The impact of globalisation and emerging geographic markets

Haute Route participation data reveals increasing diversity in cyclists’ countries of origin. Moreover, there is increasing demand for Haute Route events from cyclists residing in countries where cycling has not been a traditionally mainstream sport such as Brazil, Taiwan and Mexico. Thus Haute Route organisers believe emerging markets such as Central and South America as well as parts of Asia, principally Singapore, Taiwan, Japan, the Philippines and China could drive significant development in the coming years for the cycling sport tourism event market. This growth in emerging markets is reflective of a broader initiative by the UCI to globalise

cycling participation from grass-roots levels through to elite, reducing the sport's traditional Euro-centricity (UCI, 2018b)

In response to increasing demand within emerging markets, event organisers are seeking to leverage this increased demand by expanding their operations into those countries to initiate new events. Event management organisations staging cycling sport tourism events have increasingly been observed executing international business expansion strategies to cater for increasing demand for Gran Fondo-style events in non-traditional cycling nations. For example, the French Amaury Sport Organisation (ASO), who organise the Tour de France and its subsidiary participatory event *L'Etape du Tour*, have recently begun selling licences to local event management organisations in countries such as Australia, South Africa, China, Taiwan, Korea, Mexico, Colombia, and Brazil (L'Etape du Tour, 2018). Under this business model, local event managers gain the rights to stage cycling sport tourism events utilising the *L'Etape du Tour* branding and thus leverage the Tour de France's brand identity. Similarly, the *Gran Fondo New York*, who operate exclusively on a licensing model are developing events in places such as Bali, Colombia, Costa Rica, Brazil, Indonesia, Panama and Chile (Gran Fondo New York, 2018). We suggest that this trend will continue on the multi-day, branded event model in coming years, as illustrated by Haute Route's addition of franchises in Oman and Mexico to their 2019 events calendar.

Relatedly, the increasing globalisation of cycling is producing a crowded, year-round events calendar which creates challenges for both event management organisations and cycling sport tourism event participants. An increasingly crowded calendar could be a concern for event companies who need to carefully schedule their events with reference to the broader cycling events calendar. To not take other events into consideration means that the supply sector could

risk cannibalising itself unless demand for cycling sport tourism events continues to grow exponentially.

The increasing globalisation of cycling raises challenges and questions around strategic management for event management organisations staging cycling sport tourism events. A central strategic management consideration is potential entry into new geographical markets. Such decisions must be made based on rigorous analysis of the new jurisdiction, and a suitable business model (e.g., licencing, franchising, expansion) devised to guide a new international strategy that adds value to the corporate portfolio (Johnson, Whittington, Scholes, Angwin, & Regner, 2015). Consequently, there is scope for industry-academic collaborative research to understand demand drivers of cycling sport tourism events in emerging cycling countries, along with business models that facilitate sustainable economic business growth. Relatedly, research examining how event management organisations manage and deploy their resources and infrastructure to service a growing, globalised calendar would be of value. For example, participatory sport events are often reliant upon volunteer labour, and the way that volunteer human resources are managed can have a significant influence on the success or otherwise of an event (Leigh, Lamont, & Cairncross, 2013). Research examining resource-related issues may assist event management organisations with crafting effective functional strategies and therefore enhance the likelihood of international strategies being successful.

From a demand perspective, the growing calendar of cycling sport tourism events presents prospective participants with myriad options, creating competitive challenges for event management organisations in gaining and maintaining market share. Thus research examining participants' event selection decision making processes may shed light on aspects of product offerings and marketing strategies that could lead to competitive advantage for event organisers.

The growing prevalence of branded events (such as the expansion of *L'Etape du Tour* discussed earlier) leads to questions around the influence of brand identification in cycling social worlds, in relation to amateur cyclists' event selection decisions.

Within the context of highly dynamic business environments, it is likely that additional market trends affecting the competitive positioning of cycling sport tourism event providers will emerge as significant in the future. For example, it could also be argued that one trend not discussed, though warranting investigation, is the impact of technology, particularly the impact of digital disruption upon cycling sport tourism events. In the digital age there could well be scope for additional research opportunities that explore whether emerging cycling-specific technologies such as the web and avatar-based indoor cycle training platform, Zwift (Zwift, 2018), is perceived as a threat by cycling sport tourism event organisations? Future research could explore how evolving technologies help or hinder cycling sport tourism event organisations, and whether digital technologies can enhance the experiences of cycling sport tourism event participants through interpretive mobile applications or interactive online communities.

Conclusion

The purpose of this paper was to draw upon collaborative industry-academia knowledge exchange aimed at directing future research into highly topical trends in event sport tourism. That is, exponentially-growing supply and demand growth for cycling sport tourism events. This paper drew upon in-house industry data which was enfolded within relevant theoretical concepts to propose a future research agenda capable of yielding knowledge of interest to both practitioners and scholars. At face value academics may dismiss the data presented in this paper as lacking rigour; indeed throughout this process we have highlighted shortcomings in this

practitioner-generated data. This included confidentiality issues surrounding the company data that restricted the level of detail we were able to report. However, in doing so at the end of each of the five main sub-sections we have identified and emphasised opportunities to conduct collaborative future research that may generate higher quality, mutually beneficial knowledge for practitioners and scholars alike.

Following a general review of the extant market for participatory sport events, this paper undertook a comprehensive review of cycling sport tourism events. Anecdotal industry evidence suggests that the growth of cycling sport tourism events will continue on several continents in the coming years. This positioning paper has also identified numerous practical implications for cycling sport tourism event organisers and potential host destinations, highlighting that both single and multiday events such as Haute Route have been successful in creating unique event settings and event designs that help disengage participants from their daily life and to increase the emotional intensity of social interactions with fellow cyclists (Lee et al., 2016). Moving forward, the emphasis should now be on event organisers and destinations to work collaboratively to further create distinctive event '*stages*' in host destinations (Shipway et al., 2016). What is apparent from the analysis in this paper is that the cycling sport tourism event market will remain buoyant for the foreseeable future; this clearly provides opportunities for further development of this distinct active sport tourism market.

Despite its potential value to both parties, industry-academia collaborative research can be challenging. For example, in the context of initiating industry-academia collaboration, there is a clear tension created between the need for "quick" research and results that are required by practitioners in order to keep pace with competitors and changes in demand-side preferences, weighed against the inherently relatively slow nature of academic research which privileges

rigour and ethics. The important, though often time-consuming task of gaining university ethics approval before research can begin, is a key example of such a challenge. These challenges may also be compounded by the often-bureaucratic nature of universities which may delay proceedings in cases where formal contracts between a university and a private sector organisation are required, for example, where a formal transfer of funds between the private sector organisation to the university is required to fund aspects of the research. Thus, it is crucial at an early stage that potential industry-academia research partners clearly articulate to one-another their objectives for entering the arrangement, as well as any organisational requirements that are likely to shape a project and its timeline.

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Single Day Events

L'Etape du Tour: Formed in 1993, with 15,000 riders per year. Owned by ASO and now licensed around the world in 14 destinations.

La Marmotte: Formed in 1982, 7,000 riders per year. This is a series of 3 events including La Marmotte Pyrenees and La Marmotte Valais in Switzerland.

Wiggle Sportives: A series of 76 events across the UK with a more relaxed and low key format.

Gran Fondo New York: One of the largest and most prestigious events in North America launched in 2012 and with nearly 5,000 participants. This is now being licensed globally, with 15 planned events in 2018.

Ride London: The UK's largest event, launched in 2013, with over 80,000 participants over the weekend of varying lengths.

Cape Town Cycle Tour: The largest timed cycle event in the world, currently in its 40th year, with nearly 40,000 participants.

Multi-day Events

Haute Route: Formed in 2011, this multi-day series of 7-day and 3-day events features 11 locations for 2018, in France, Italy, Norway and the USA.

Hot Chillee: Formed in 2004, it has 4 three to four day events in 2018 in the UK, France, Italy, Morocco and South Africa.

Table 1 – Single and Multiday Cycling Sport Tourism Events

Trends	Research opportunities	Concepts
Mobile event modalities and their economic contribution to host destinations	<p>Do/how do mobile event modalities assist with disbursing economic impacts across wider geographic areas?</p> <p>Do mobile event modalities lessen event impacts on host destinations?</p> <p>How do the economic impact of cycling sport tourism events compare to other kinds of sport tourism events?</p>	<p>Tourism economic impacts</p> <p>Regional development</p> <p>Economic impact measurement</p>
Heterogeneity in cycling sport tourism event participants	<p>How/on what basis do cycling sport tourism event participants vary?</p> <p>How does heterogeneity across event participants relate to event preferences?</p> <p>What implications does heterogeneity have for event product design?</p>	<p>Event participant segmentation</p> <p>Enduring involvement</p> <p>Recreation specialization</p>
(Marginal) increasing women's participation / the gender divide	<p>What explains the significant difference between numbers of male and female participants in cycling sport tourism events?</p> <p>What constraints do latent/prospective female participants perceived as hampering their participation in such events?</p> <p>Does the emphasis on men in professional cycling contribute to these gender inequities?</p> <p>What are the experiences of female cycling sport tourism event participants?</p> <p>Are social interactions within event spaces inclusive or exclusionary to female participation?</p> <p>Effect of product design (e.g.</p>	<p>The role of gender in sporting social worlds</p> <p>Sport as a traditional space of heteronormative masculinity</p> <p>Leisure constraints</p> <p>Constraints negotiation</p>

	time limits) on women's perceived constraints?	
Increasing demand for new places and exciting event concepts	<p>What influence do social world insiders play in shaping demand characteristics among cycling sport tourism event participants?</p> <p>What are the drivers of increasing demand for more challenging/more exotic event experiences among cyclists?</p> <p>What role does the event travel career concept play in explaining demand for more challenging/exotic experiences?</p>	<p>Social worlds and social identity in sport</p> <p>Event travel careers / Serious leisure careers</p> <p>Cultural capital in social worlds ('collecting' places)</p> <p>Embodying landscapes of sporting significance</p> <p>Sport heritage</p>
Globalisation and emerging geographic markets	<p>What are the key drivers of demand for cycling sport tourism events in emerging geographic (developing) markets?</p> <p>How do event management organisations decide whether to enter new geographic markets?</p> <p>What are the appropriate business models for entering new geographic markets (franchising, licensing, in-house expansion)?</p> <p>How do the event management organisations cater to this increasing calendar? How do they make decisions around resource allocation, ensuring adequate levels of staffing given their pulsating workforce requirements?</p> <p>Does/how does the expanding cycling calendar impact upon amateur cyclists' event participation patterns?</p> <p>What role does brand identification play in amateur</p>	<p>Globalisation</p> <p>Strategic management (business model composition, international strategy options, functional strategy)</p> <p>Competitive advantage</p>

	<p>cyclists' event participation decisions?</p> <p>How does the growing calendar influence the way amateur cyclists manage their leisure time in preparing for/participating in events?</p>	
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Table 2. Cycling sport tourism events trends and research themes.