

# BICYCLE TOURISM

## 2014 SURVEY

POWERED BY



**ADVENTURE TRAVEL**  
TRADE ASSOCIATION

[www.adventuretravel.biz](http://www.adventuretravel.biz)

# Methodology

**CONDUCTED** MAY 28 THROUGH JUNE 22, 2014  
**USING** QUESTIONPRO ONLINE SOFTWARE  
**COMPLETED** 184 COMPLETED SURVEYS  
**PARTIAL** 282 PARTIAL RESPONSES

**This project was supported by the contributions of ATTA and members of our community. Special thanks to:**

PAUL EASTO, WILDERNESS SCOTLAND

ALEJANDRO GONZÁLEZ, VENEZUELA ELITE

LAUREN HEFFERON, CICLISMO CLASSICO

JORGE PEREZ, TIERRA DEL VOLCAN / WORLD BIKE ADVENTURES

MARIA ELENA PRICE, EXPERIENCEPLUS! BICYCLE TOURS

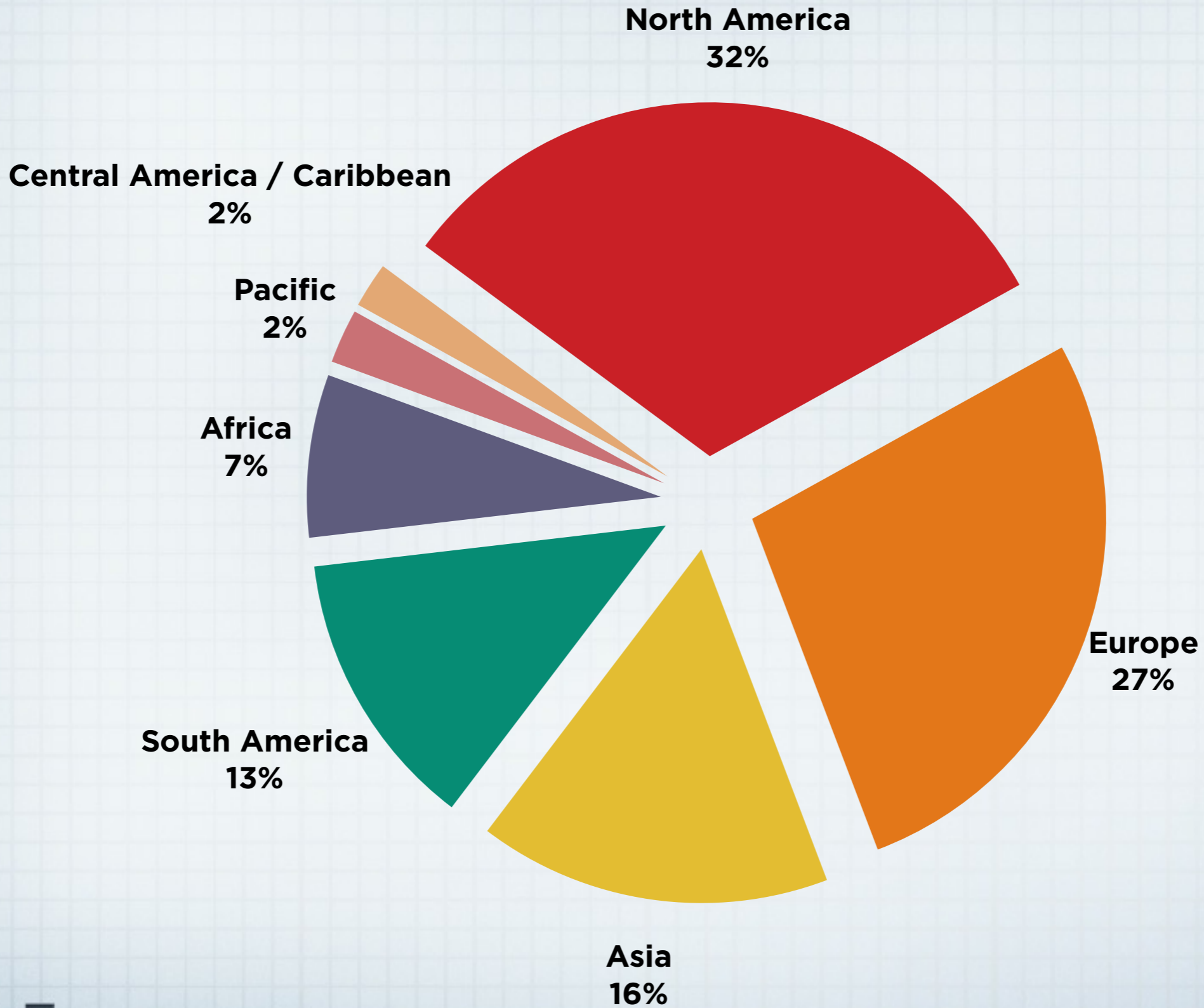
MONICA PRICE, EXPERIENCEPLUS! BICYCLE TOURS

JIM SAYER, ADVENTURE CYCLING ASSOCIATION

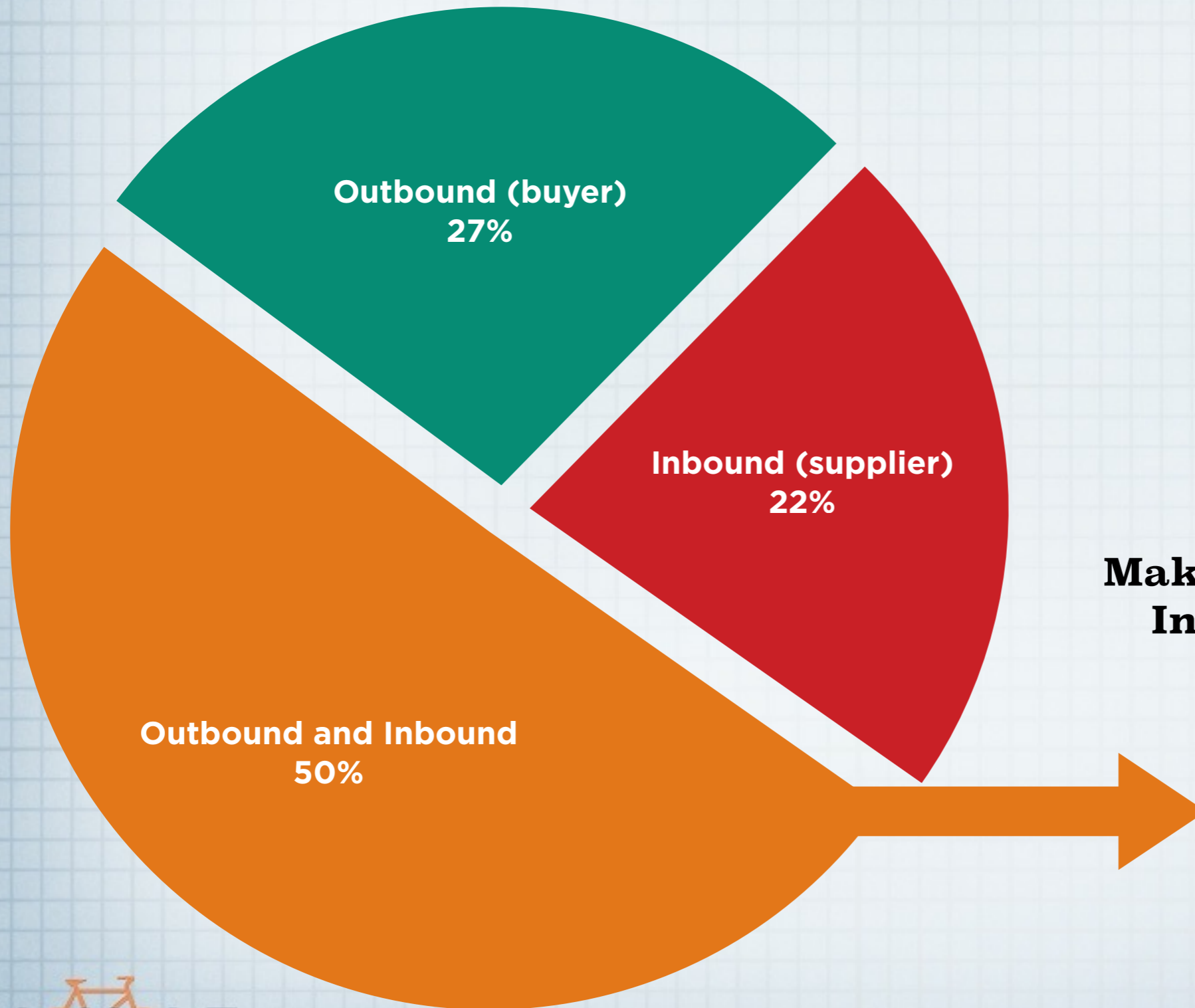
JAMES VAN DER WESTHUIZEN, MY ADVENTURE NAMIBIA

EUAN WILSON, H&I ADVENTURES LTD

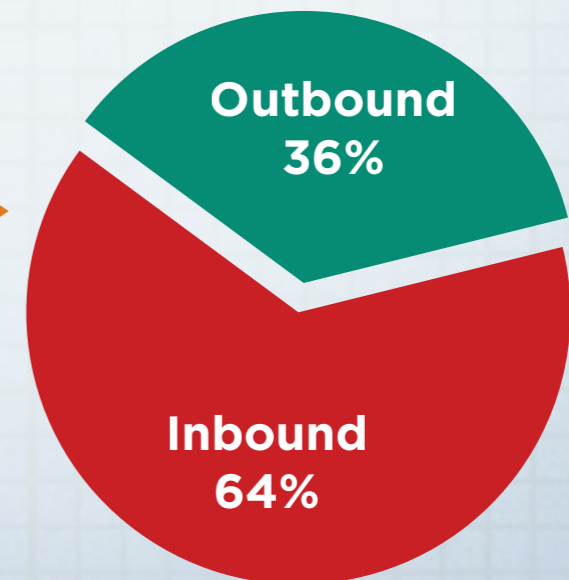
# Organization Headquarters



# Tour Operation Type



## Makeup of Companies Both Inbound and Outbound

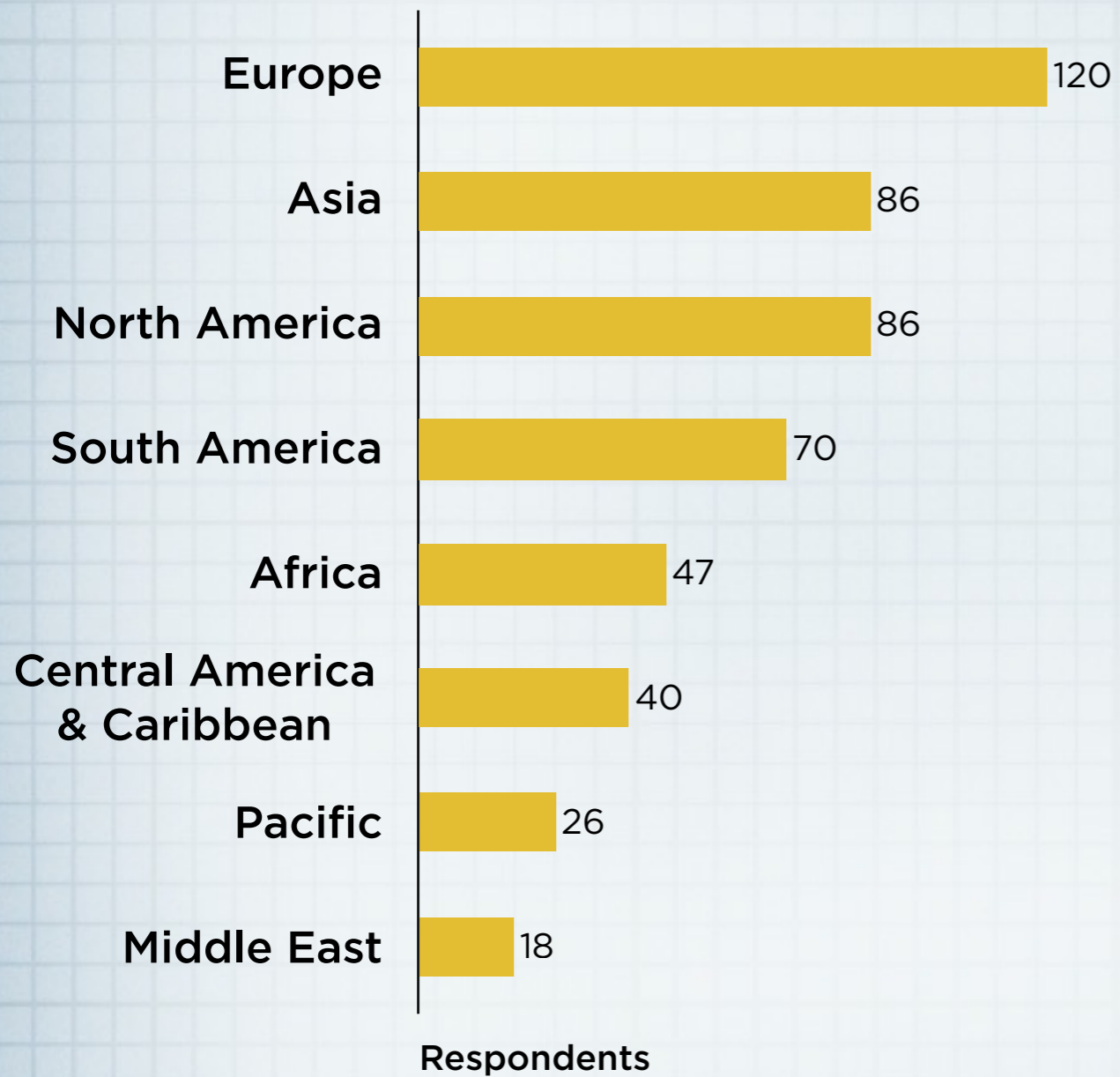


**What percentage of your revenue derives from sales of bicycle trips or related bicycle travel services?**

**45.6%**

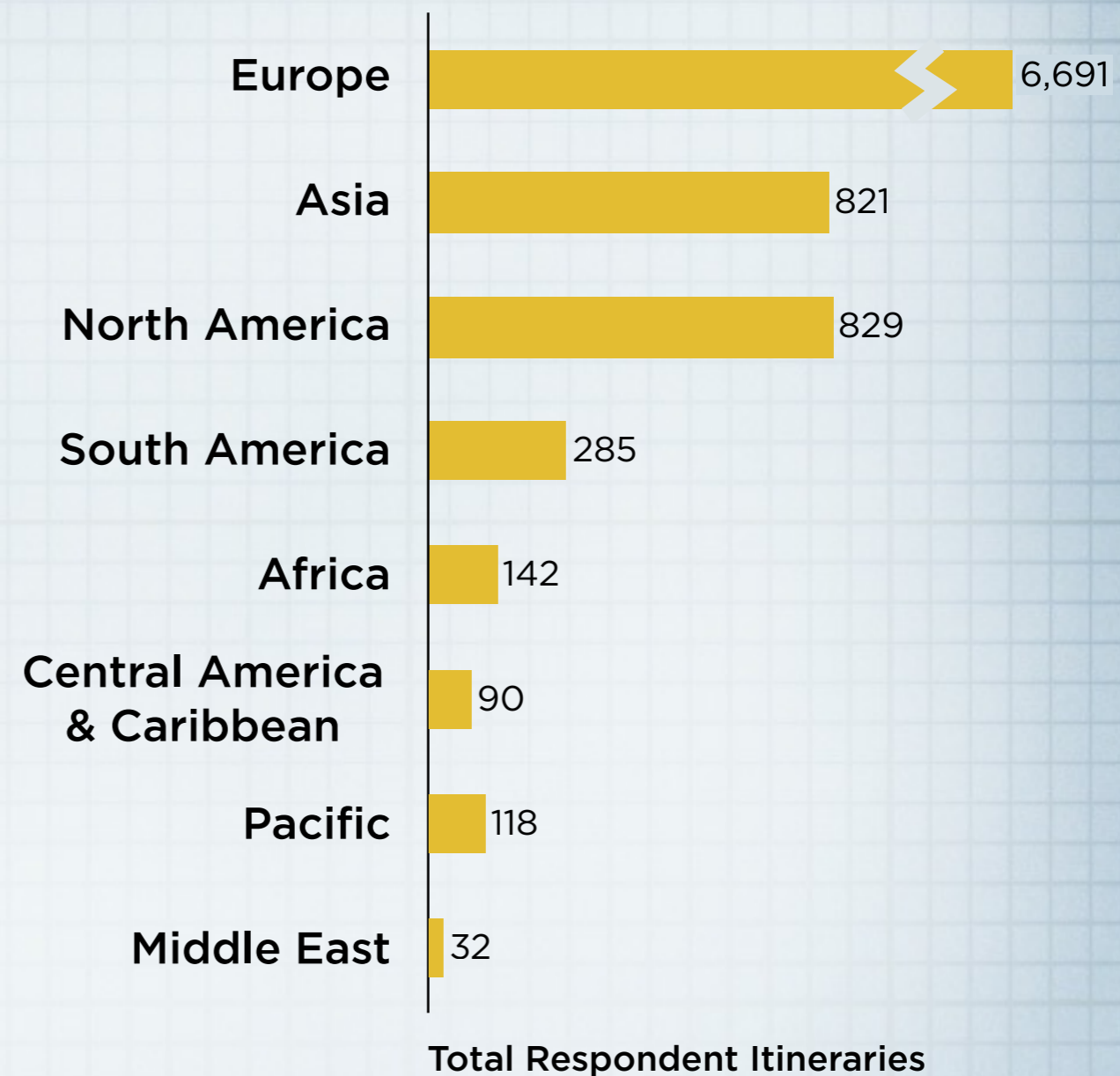
REVENUE DERIVED FROM BICYCLE TRIPS

# Regions Sold/ Operated

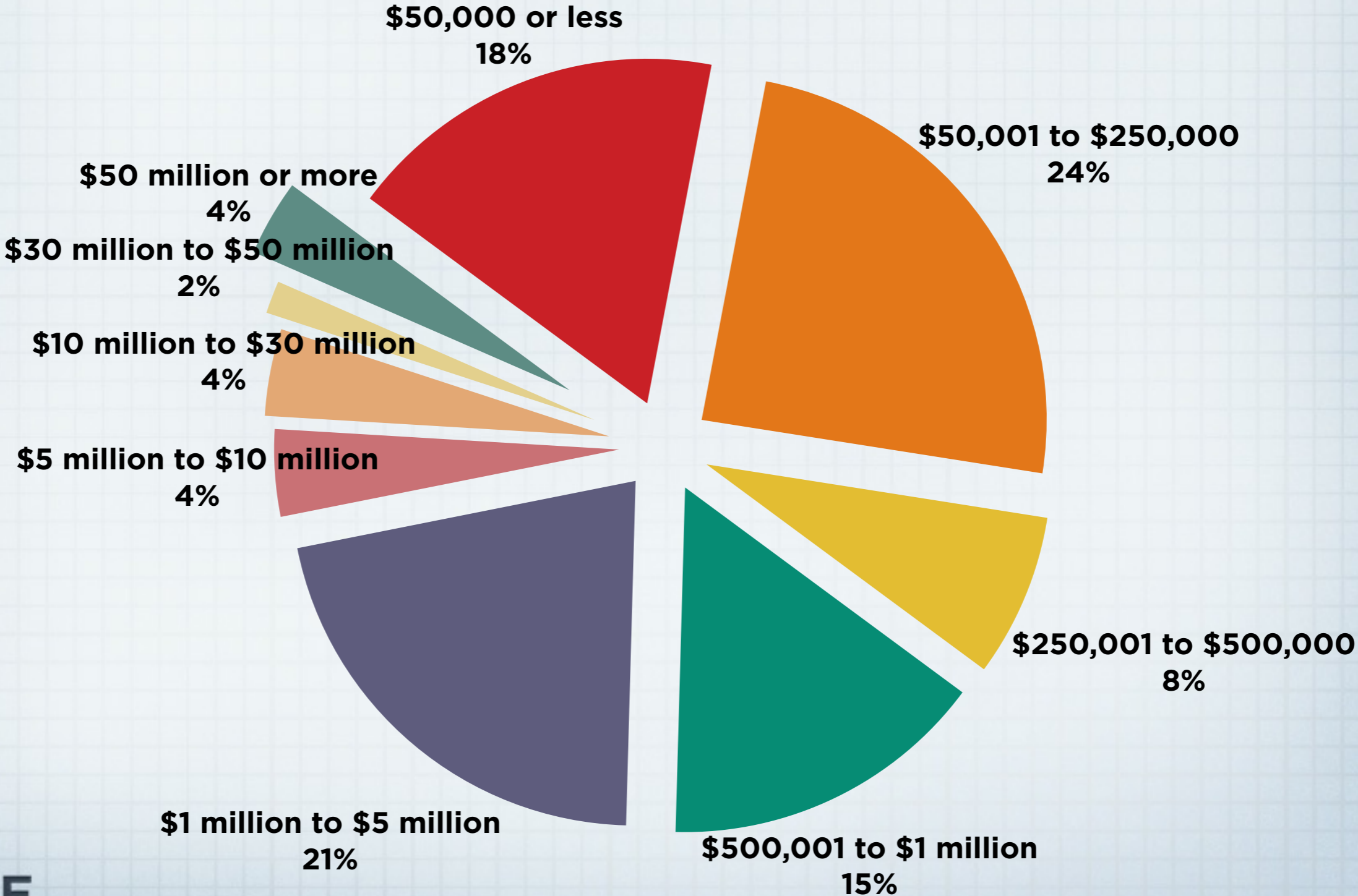


*\* Respondents selected all regions that were being sold/operated*

# Itineraries Offered



# 2013 Gross Revenue





# Net Profit Margin in 2013

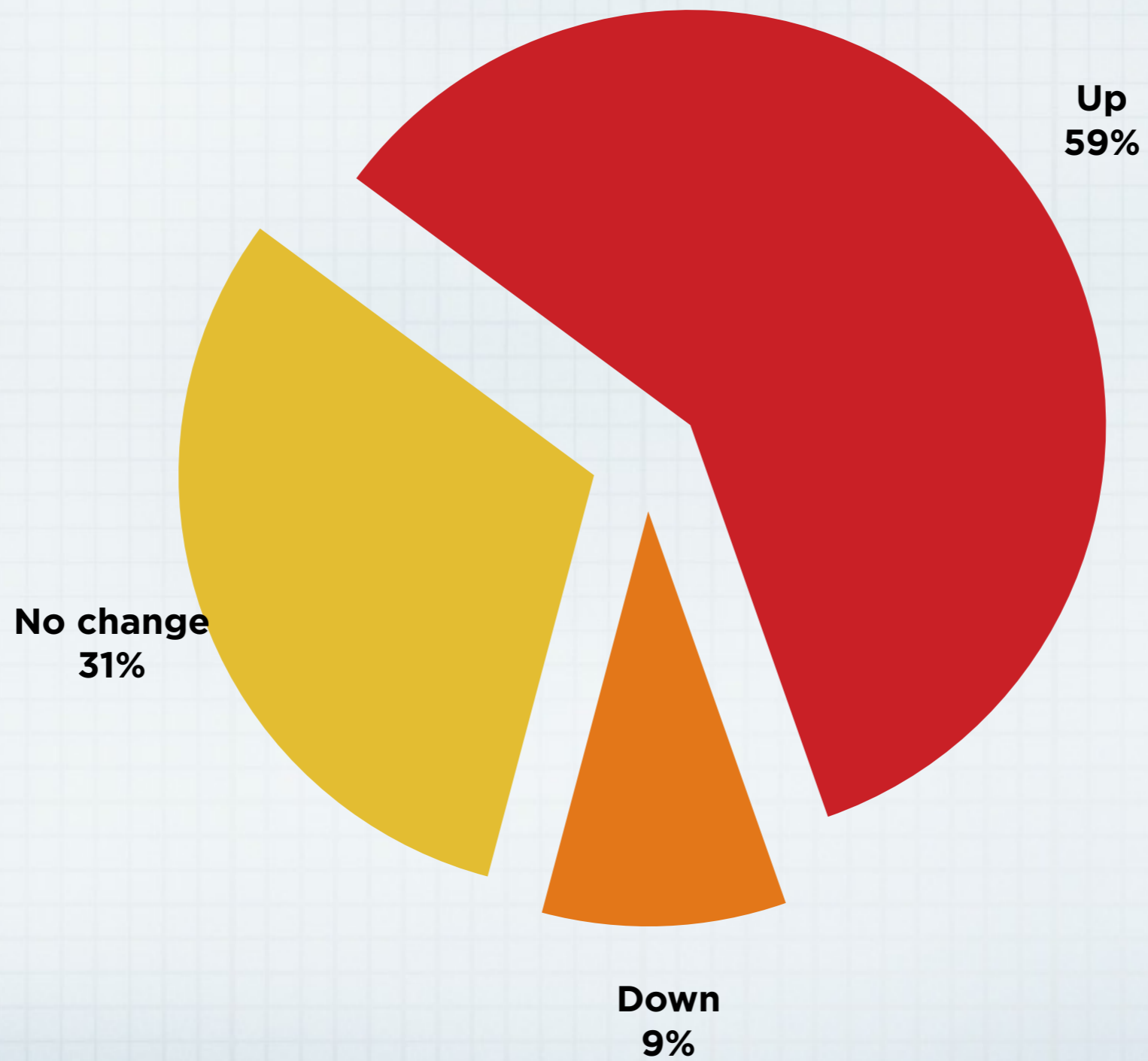
Company Type	Inbound	Outbound	Both Inbound and Outbound
Net Profit Margin	17.2%	16.0%	16.0%

**SURVEY AVERAGE**

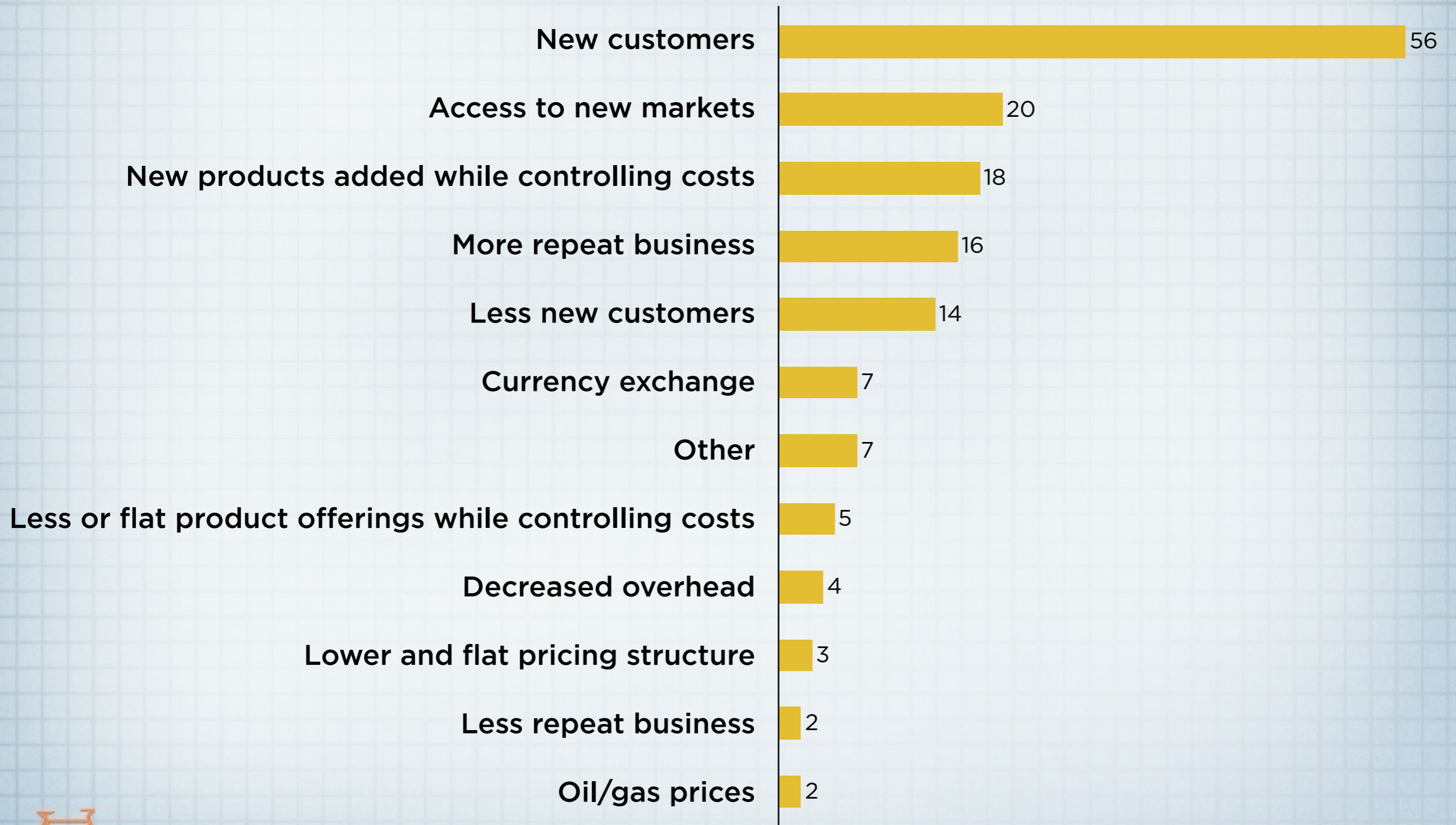
**16.3%**

**NET PROFIT MARGIN**

# Net Profit Outlook for 2014

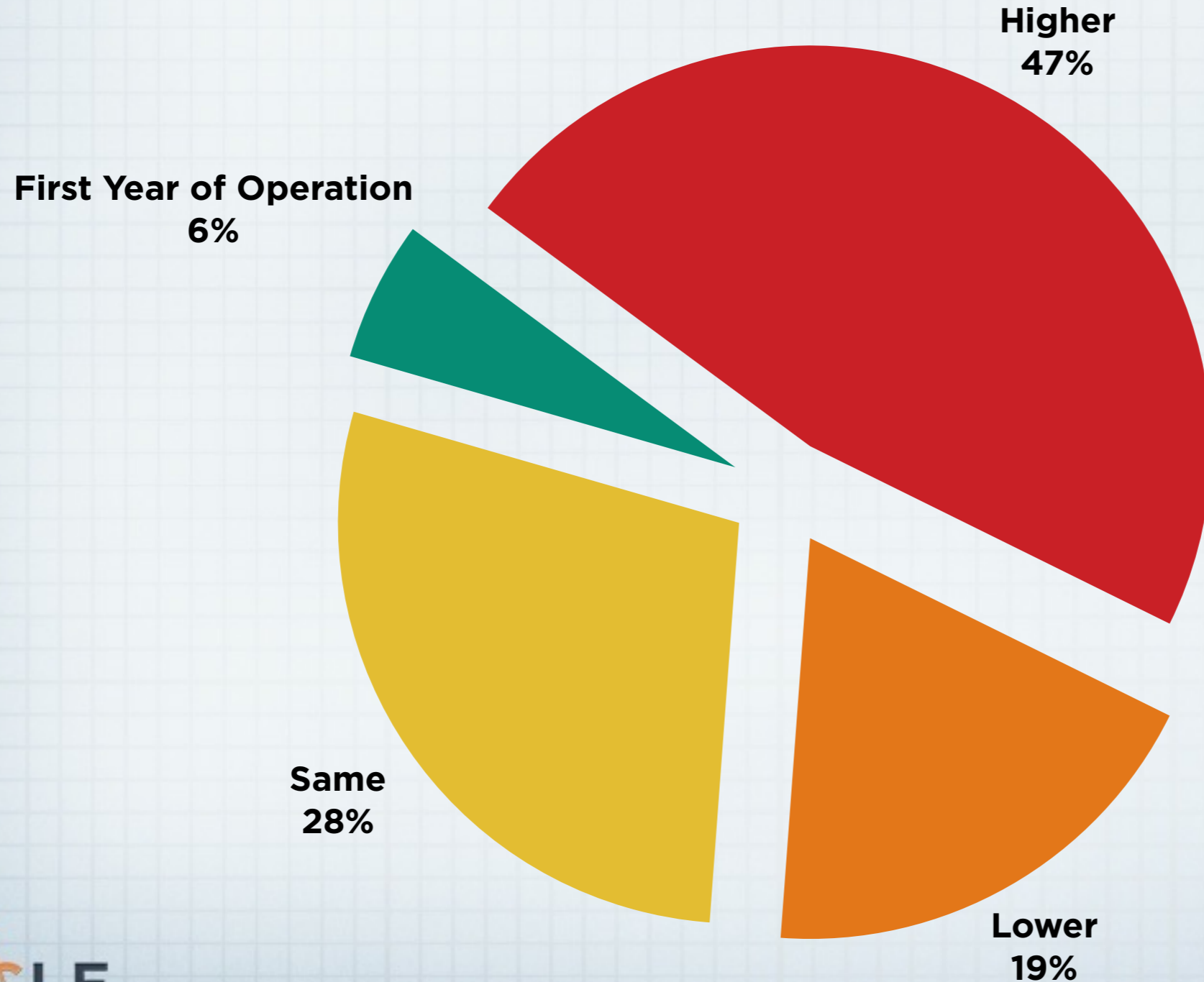


# Primary Factor Influencing Net Profit Projections



Respondent Count

# How do reservations in the period from November 2013 through April 2014 compare to the same period last year for bicycle trip?



**What percentage of the time do you create  
custom itineraries?**

**35.3%**

**CUSTOM ITINERARIES**

# Average Trip Length

7.0

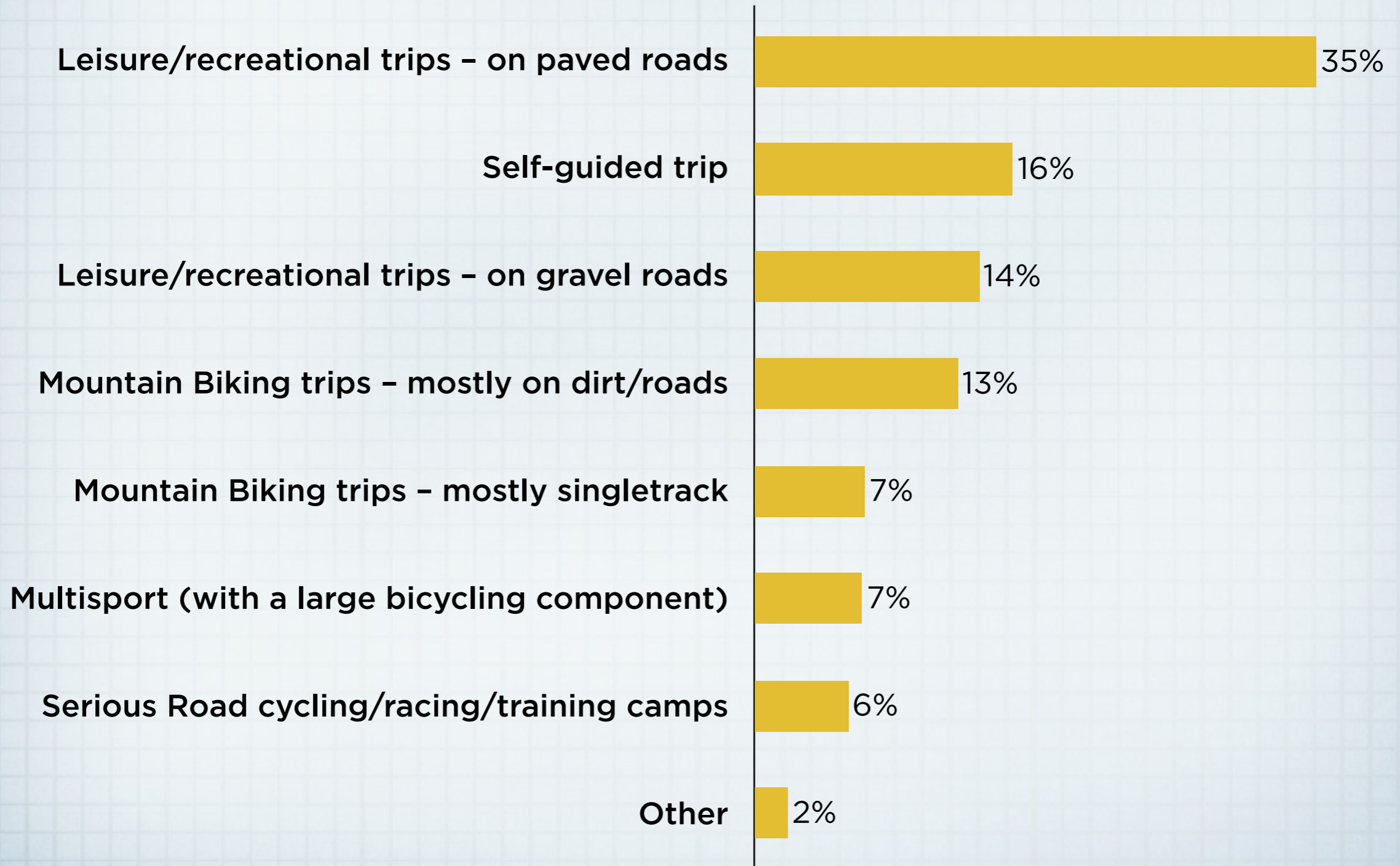
DAYS

# Average Trip Price

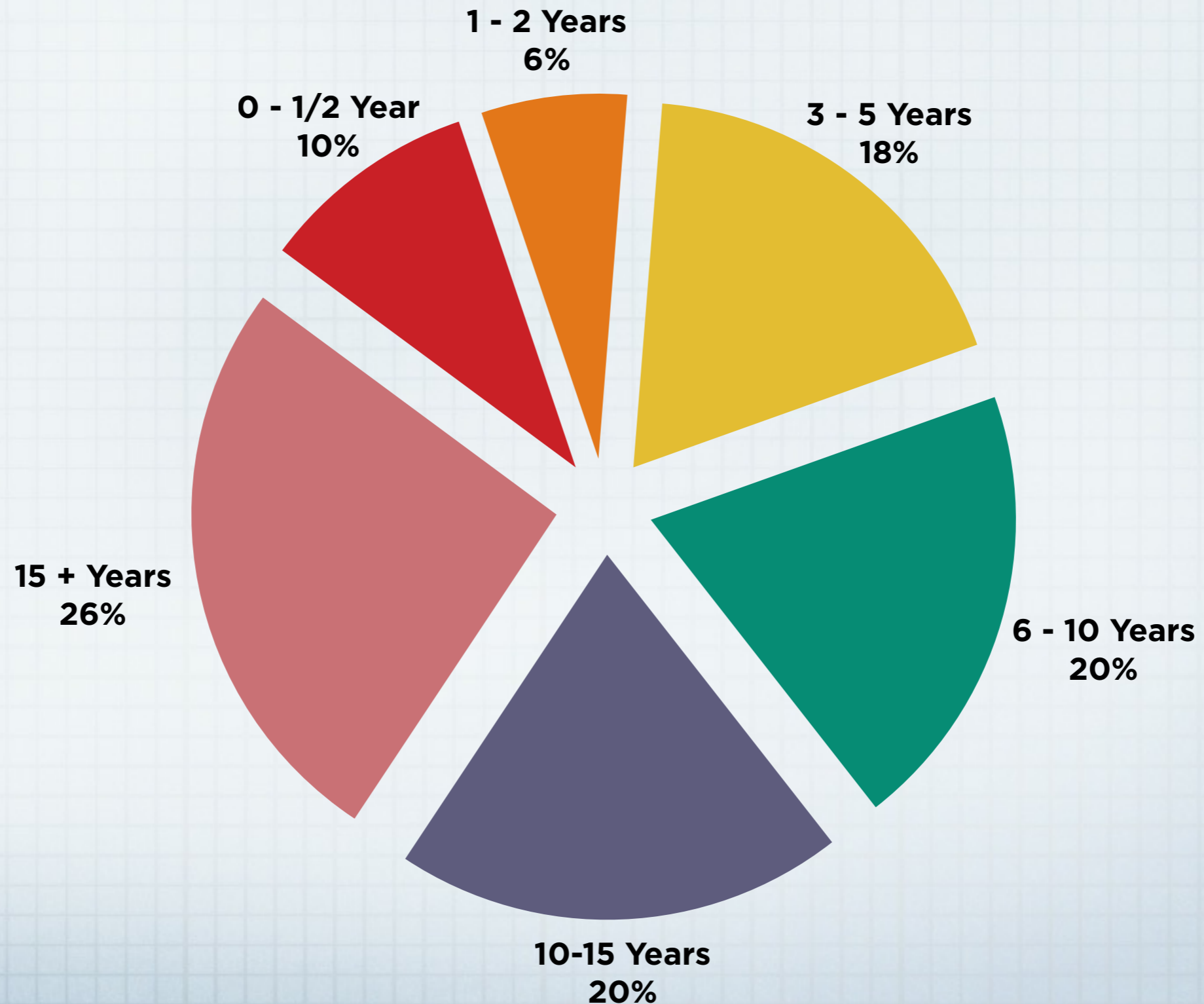
\$257

U.S. DOLLARS PER DAY

# Types of Bicycle Trips

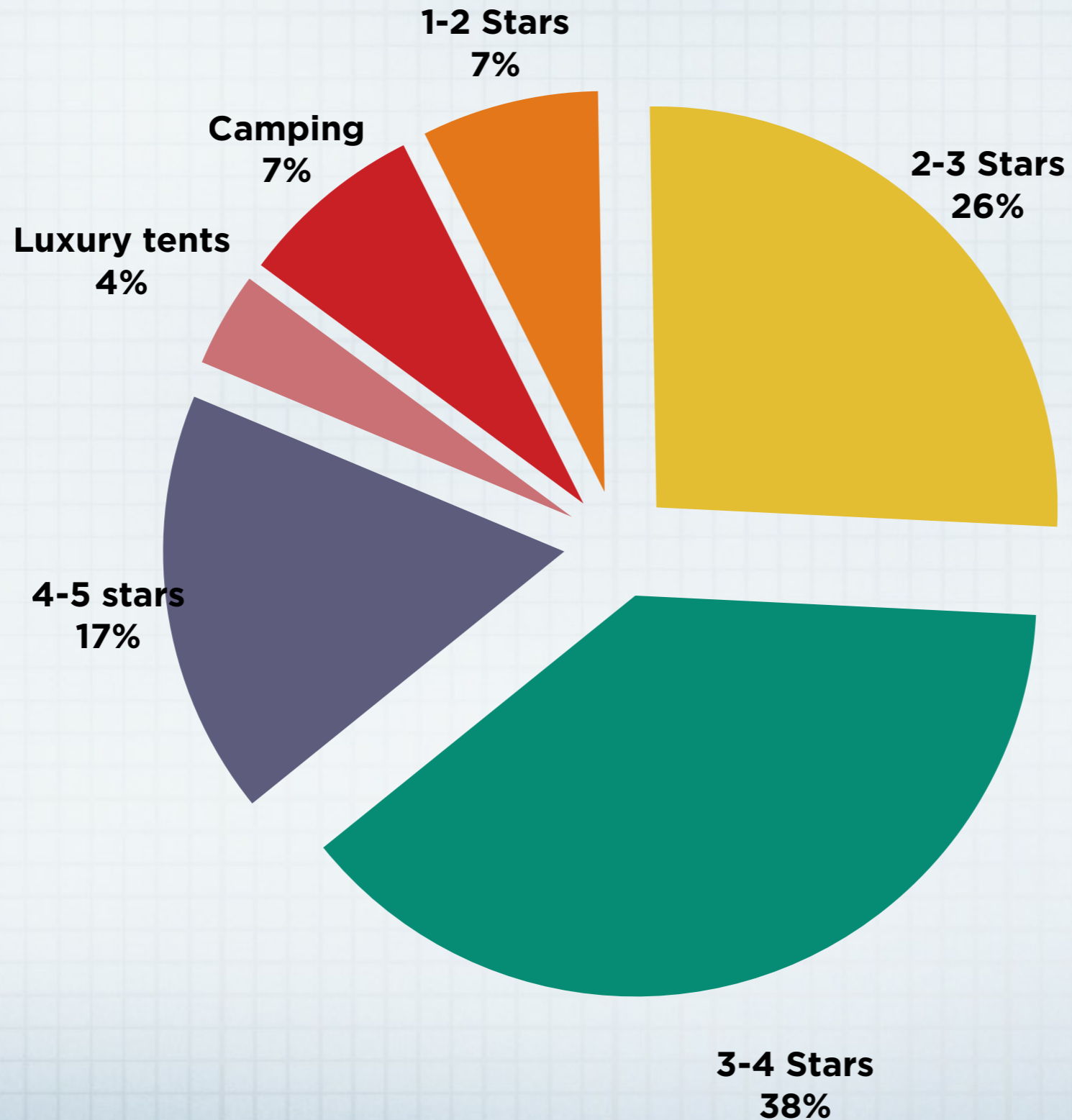


# How long have you been offering these types of bicycle trips?

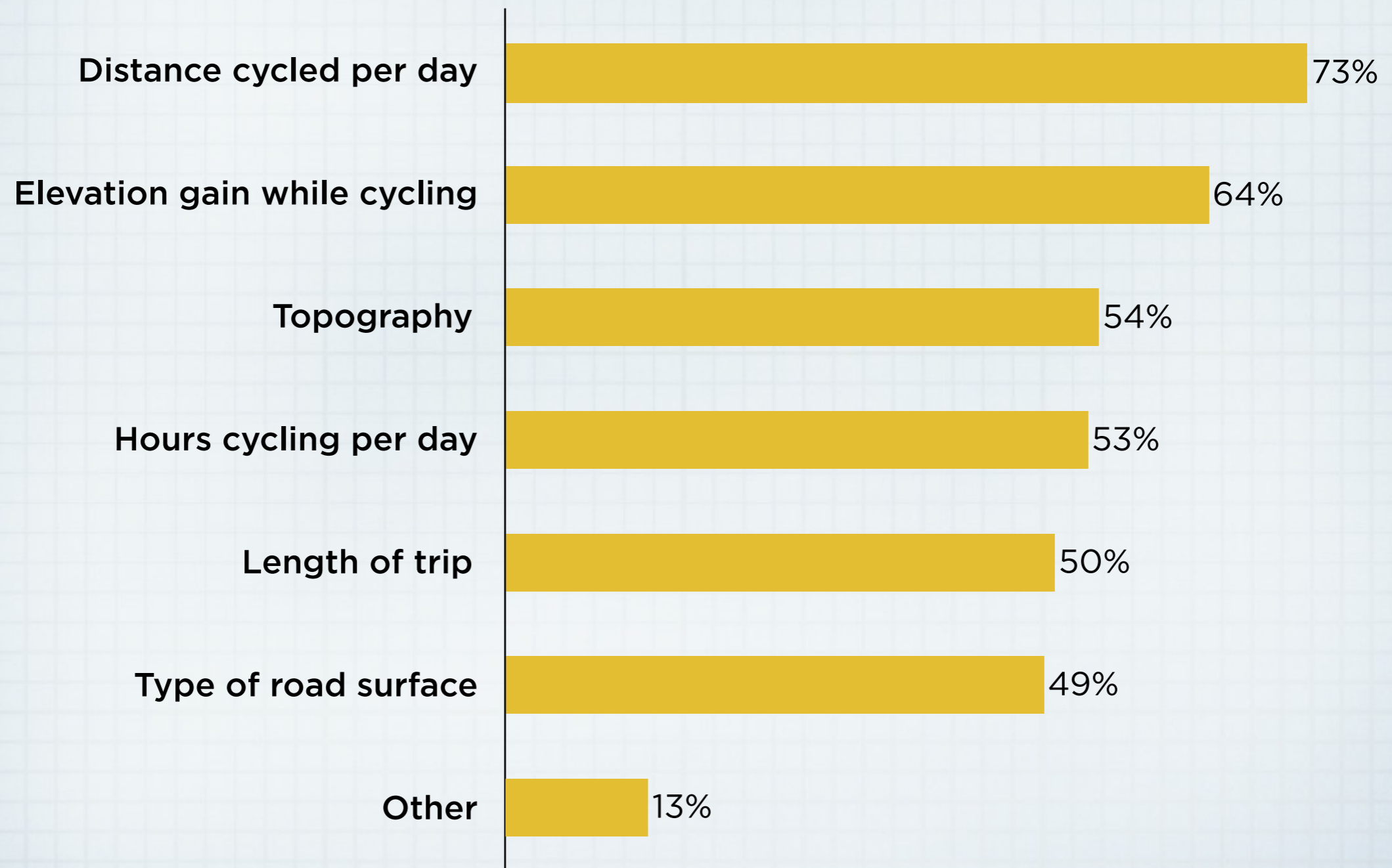




# Trips using the following accommodation types

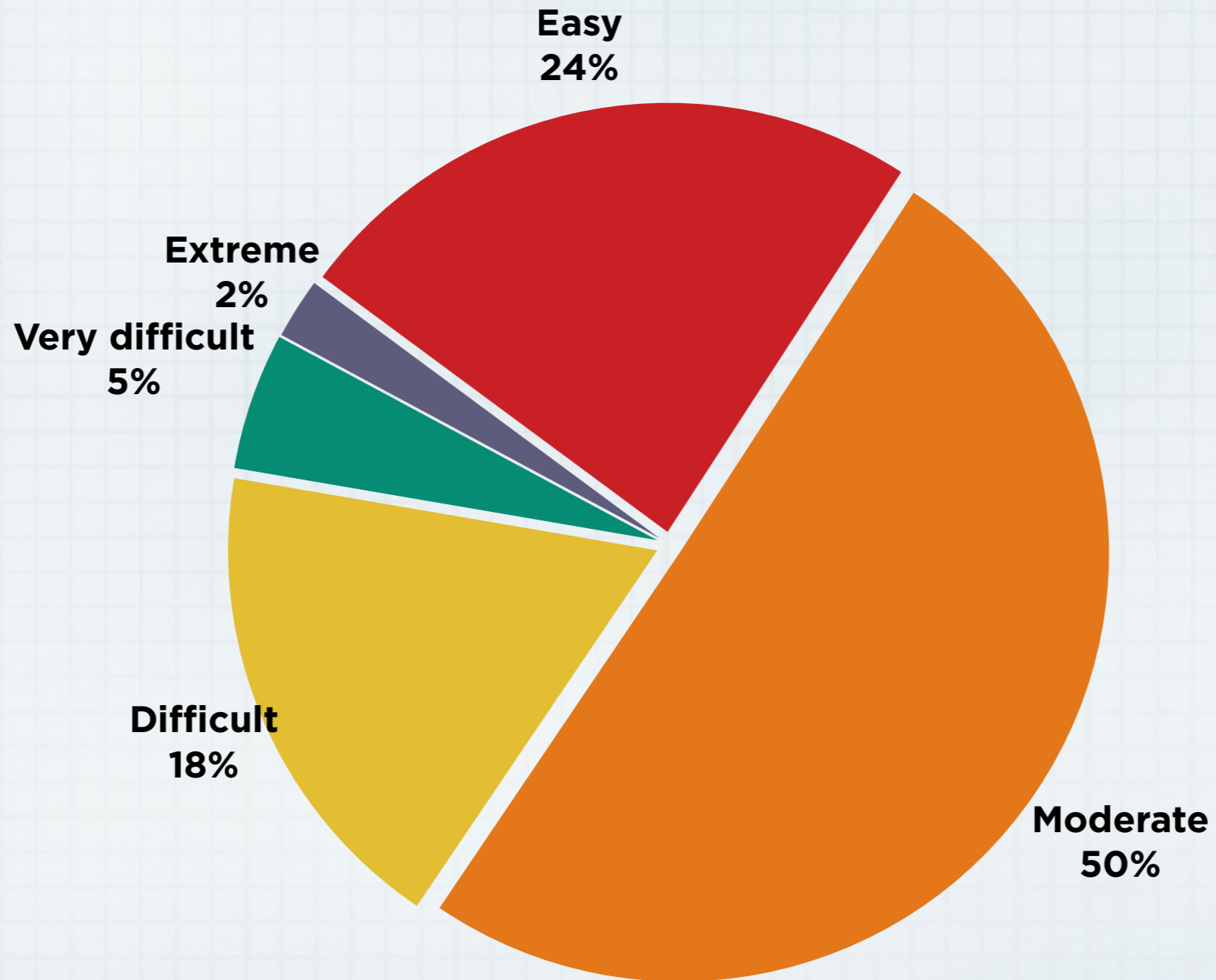


# What characteristics does your company use to define difficulty or rate your cycling trips?

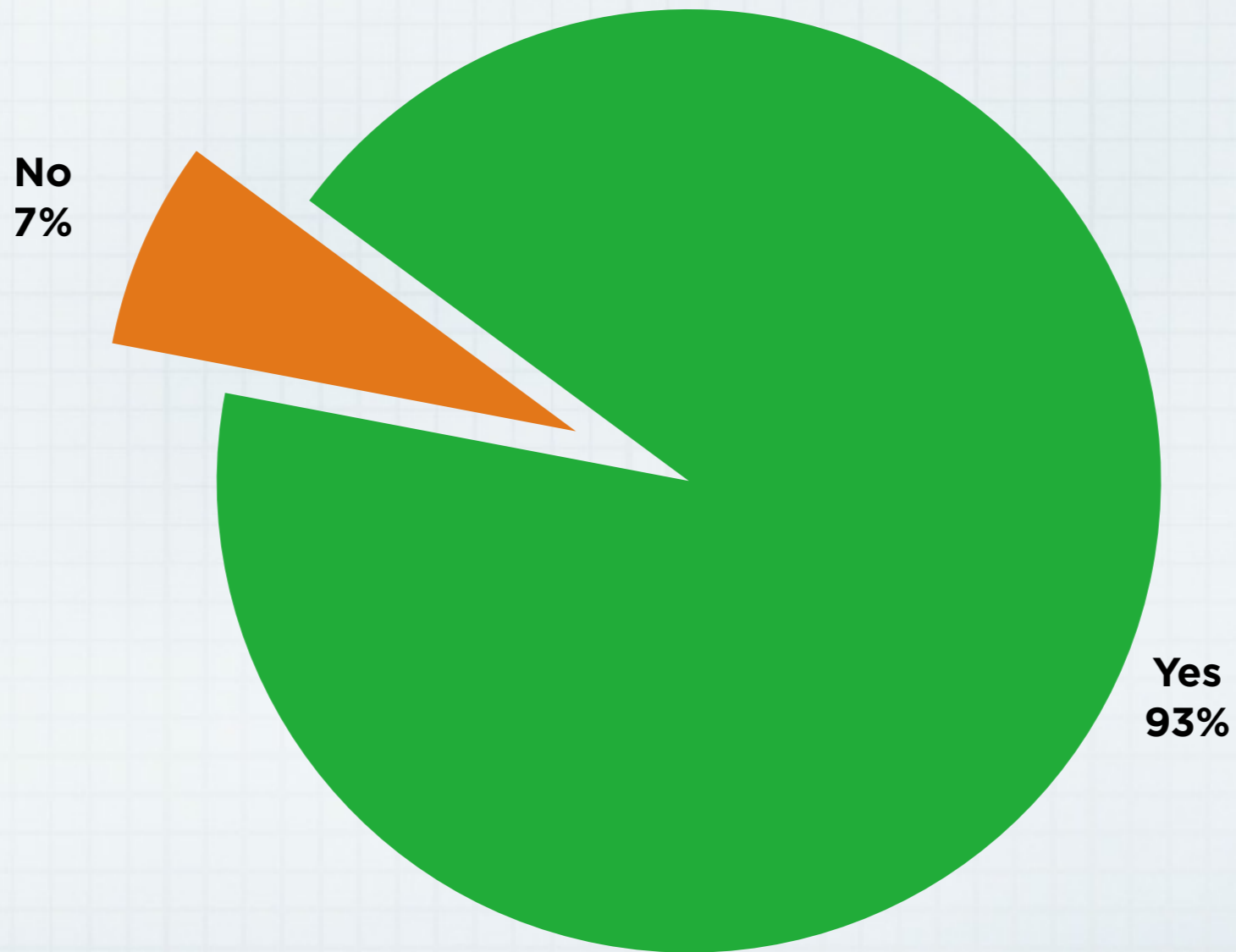


*\* Respondents selected all characteristics that defined difficulty for their trips*

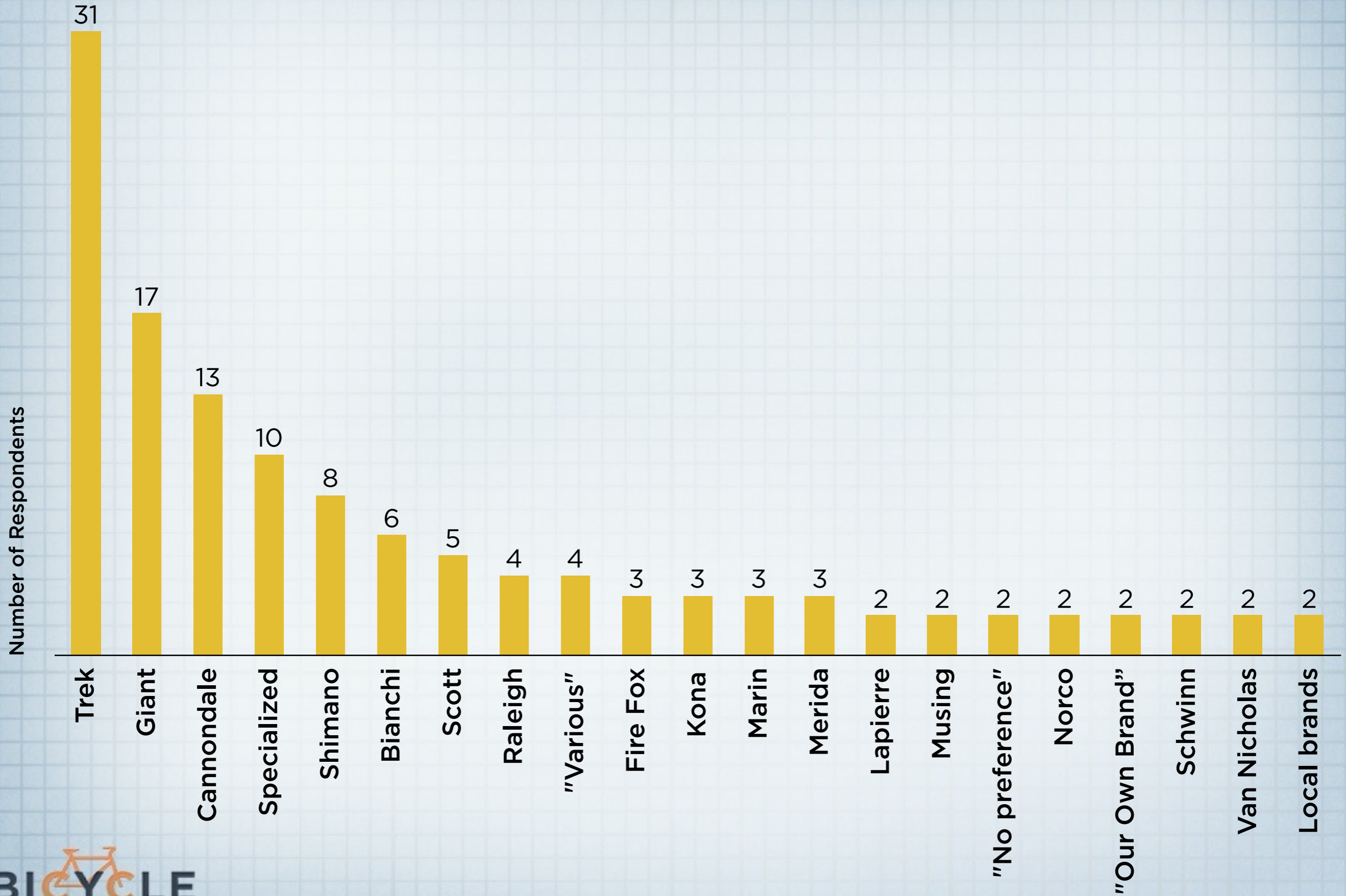
# Difficulty of Bicycle Trips



# Do you rent/provide the bicycles to your clients?



# Brands Offered

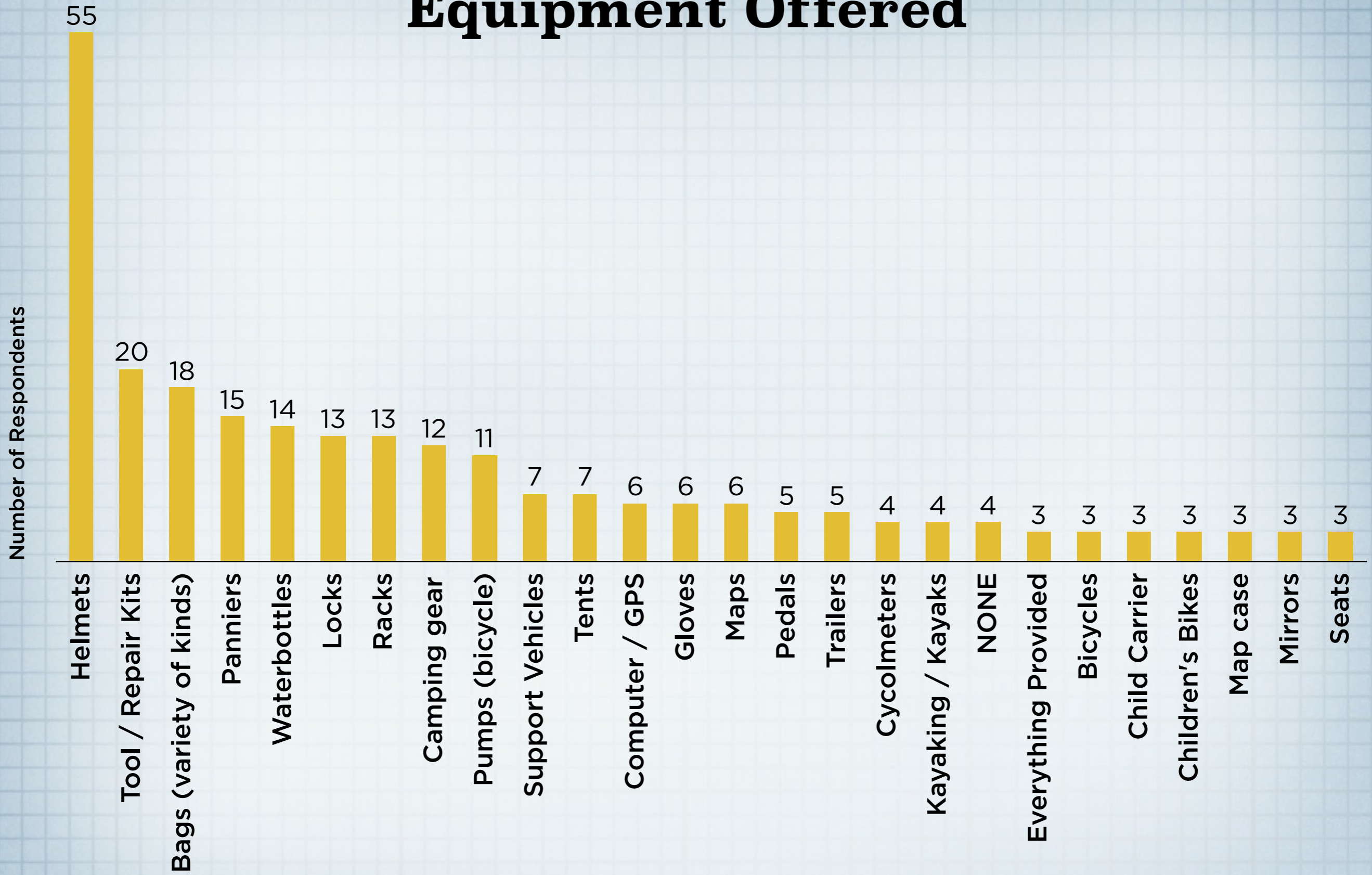


# Other Brands Offered

## Single Respondent Selecting

- Avanti
- Bambucicletas
- Bergamont
- Bontrager
- Breezer
- BSA SLR
- Canyon
- Carbon Fibre
- City Bikes
- Commencal
- Components used (on variety of bikes)  
Brands used on our trips include Trek, Giant, Specialized, Leader Fox.  
Components are generally middle of the road (ie., Shimano tiagra, 105
- Corratec
- Cube
- CUSTOM BUILT
- Diamont
- DiVinci
- DRAG
- Evon
- Focus
- Fuji
- Hercules
- Hero
- Indina
- Jamis
- Leader Fox
- Orbea
- Oxea
- Public
- RAM
- Ridgeback
- Terry
- Touring bikes
- Turner
- Venzo
- Willier
- Yeti

# Equipment Offered



# Other Equipment Offered

## One or Two Respondents Selecting

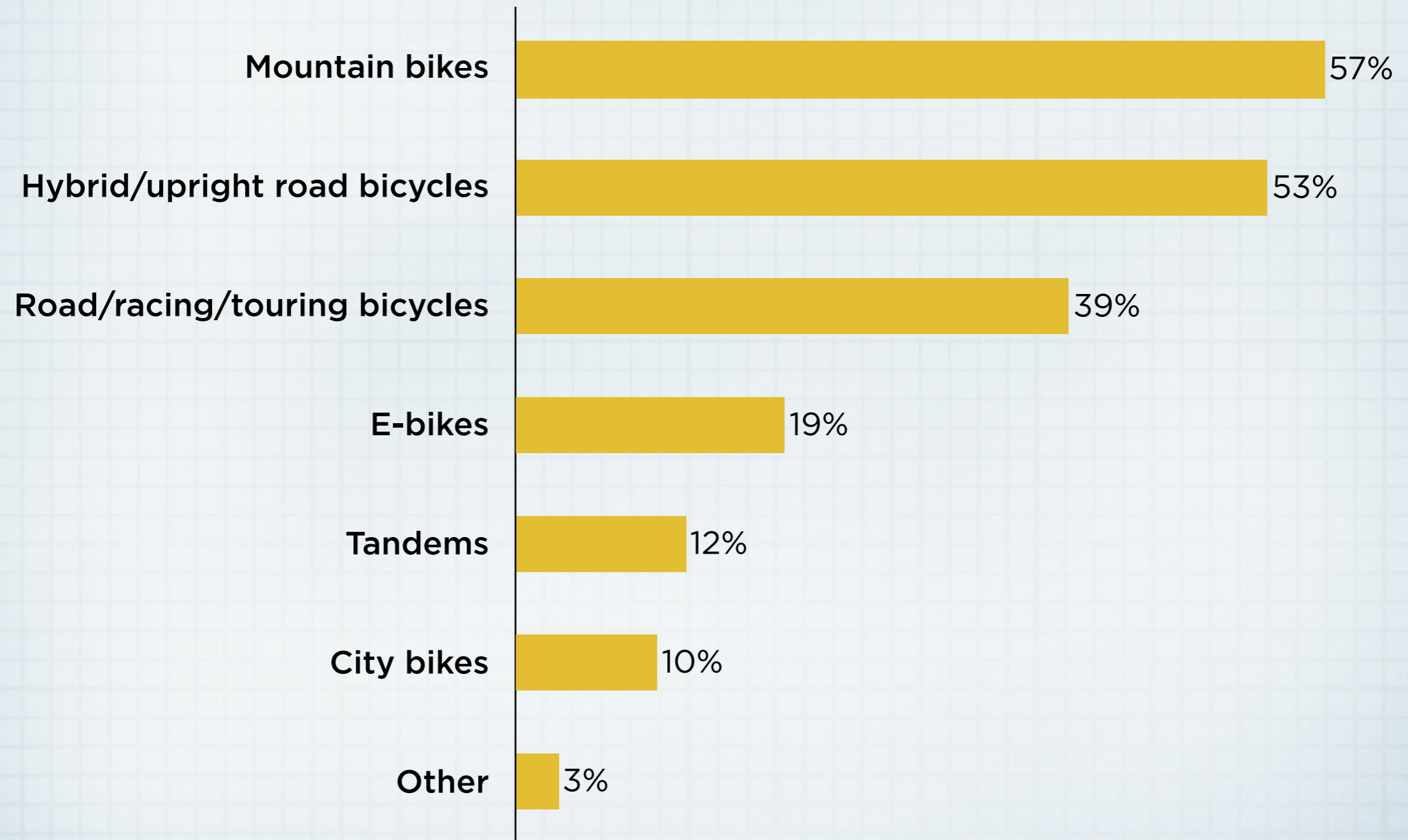
- Bar ends
- Bells
- Bike Trailer
- Bottle Cages
- Camp Kitchen
- Chairs
- Cooking gear
- Head Cover
- Lights
- Mechanis
- Medical Supplies
- Medics
- Mobile phone
- Oxygen Tanks
- Pedometers
- Reflective Clothing
- Roadbooks
- Sea surfing
- Spare Bike
- Sport Fishing
- SUP
- T-shirt / Jersey (branded)
- Tag alongs
- Tandems
- Trunks
- Wedges - Seat



# Do you own your rental fleet?



# What type of bicycles do you rent/provide?

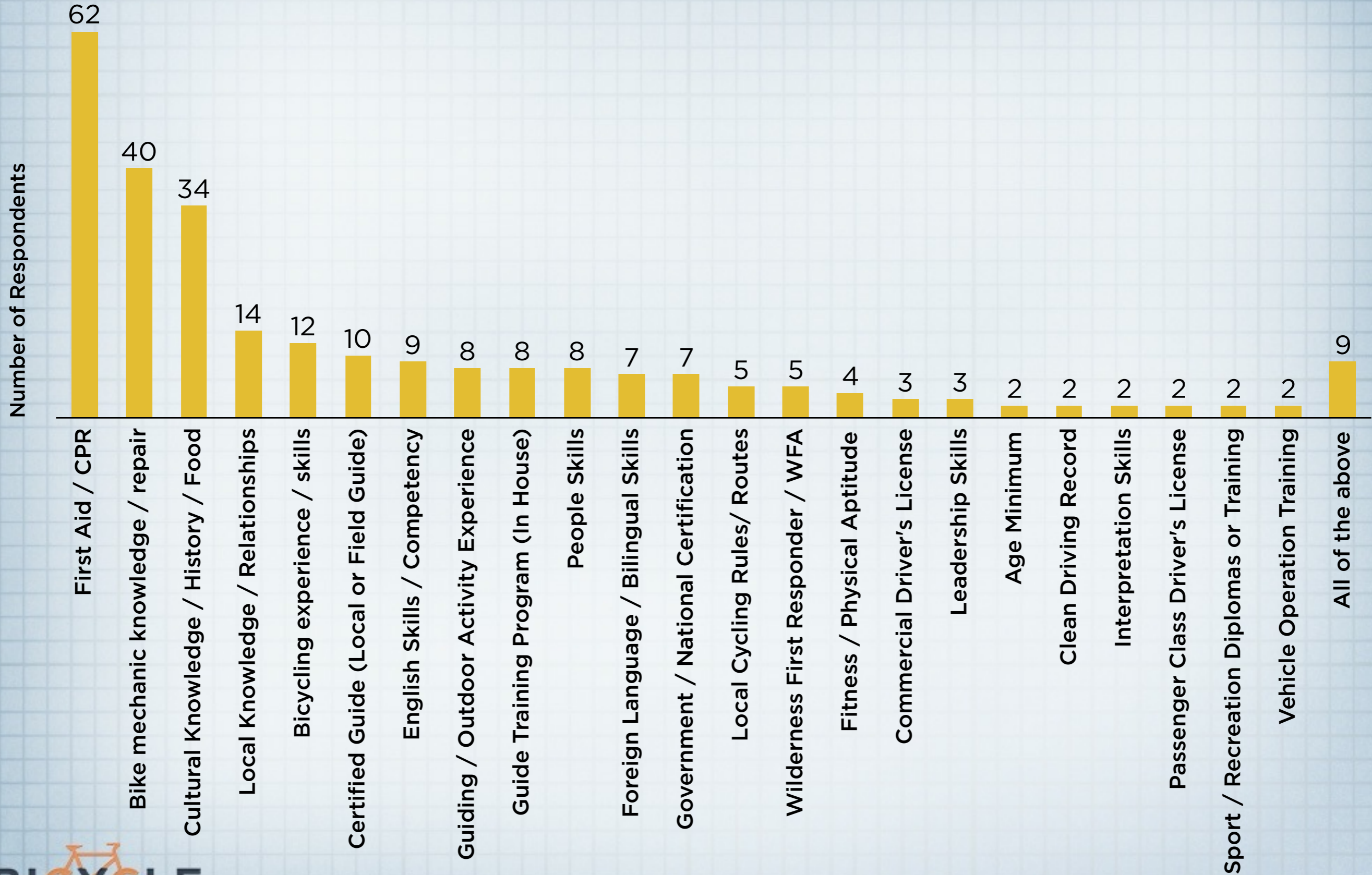


*\* Respondents selected all types of bikes that are provided.*

# Do you contract with guides for your trips?



# Training Requirements for Guides

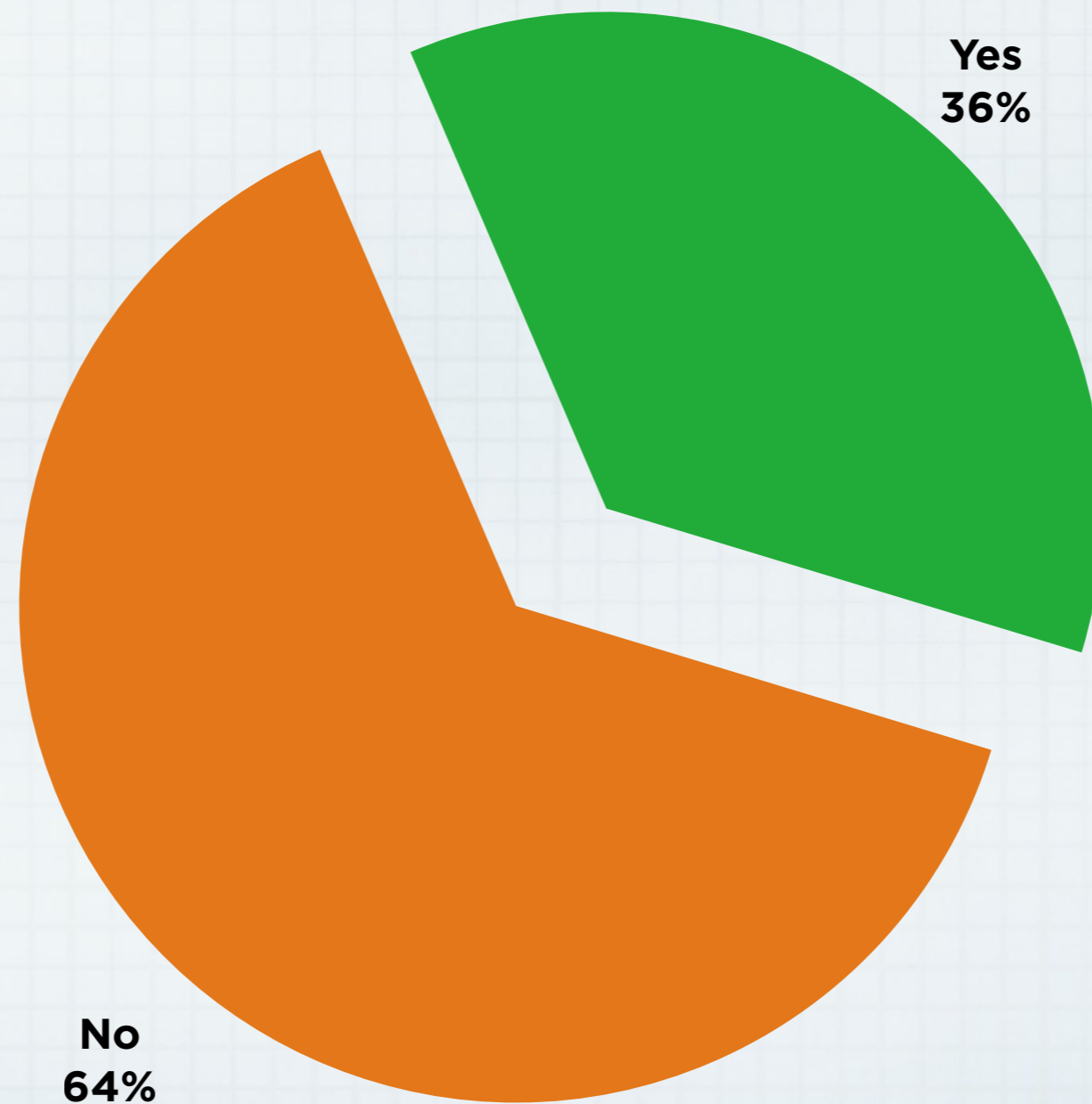


# Other Training Requirements

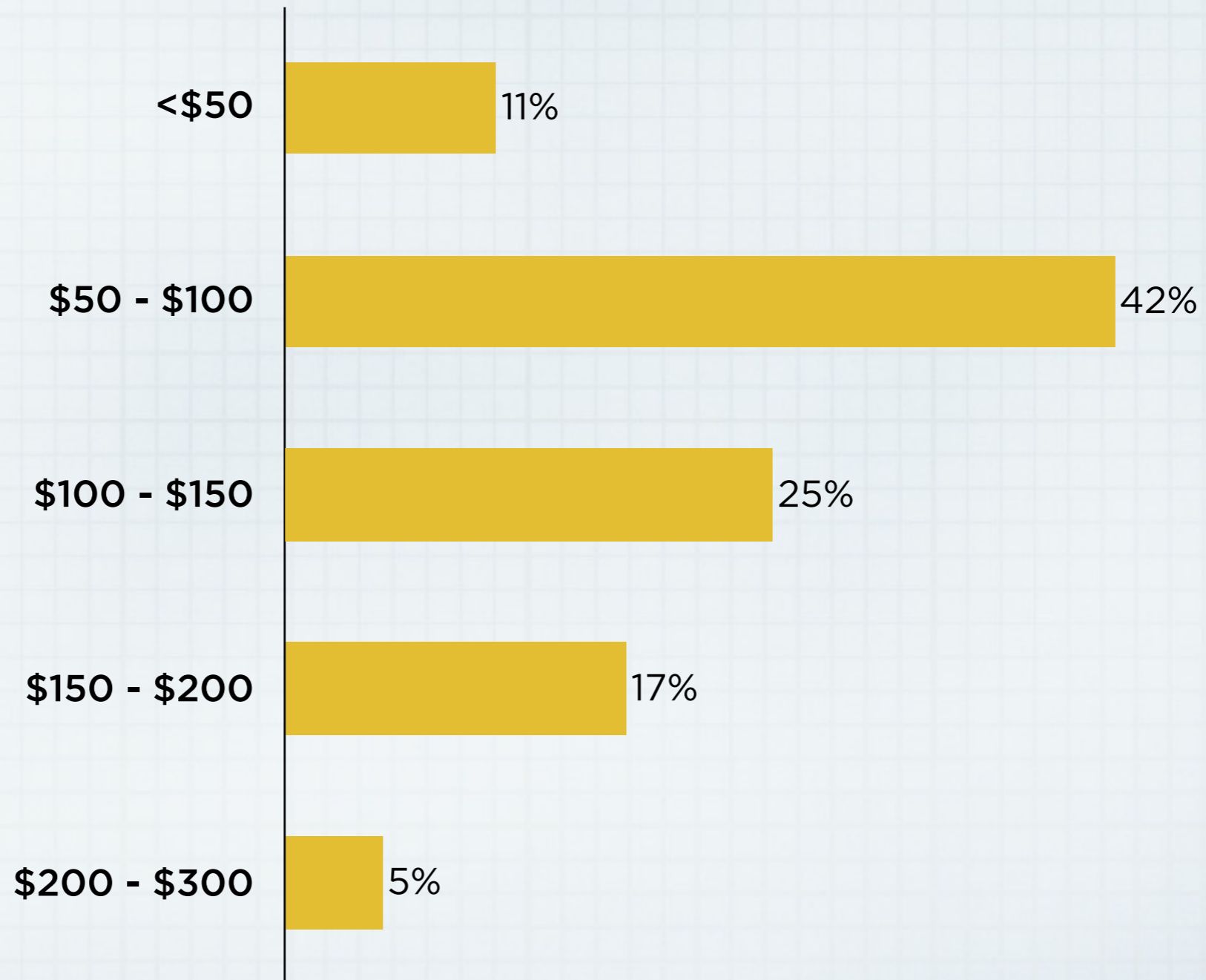
## One Respondent Selecting

- Chauffeur's license
- Child Protection Certificate
- Disclosure (where relevant)
- Driving
- Empathy
- Flexibility
- Food Handler's Certificate
- Ingenuity
- Meal Preparation Skills
- Minimum Years Experience (5)
- Mountain Bike Guiding and Maintenance Training Program
- Open Water Safety and Rescue - American Canoe Association
- Risk Management
- Socio-Cultural Synergy
- University degrees in tourism, guiding, or environmental science

# Are there national qualifications your guides must have to guide bicycle trips?



# Daily Guide Rate in US Dollars

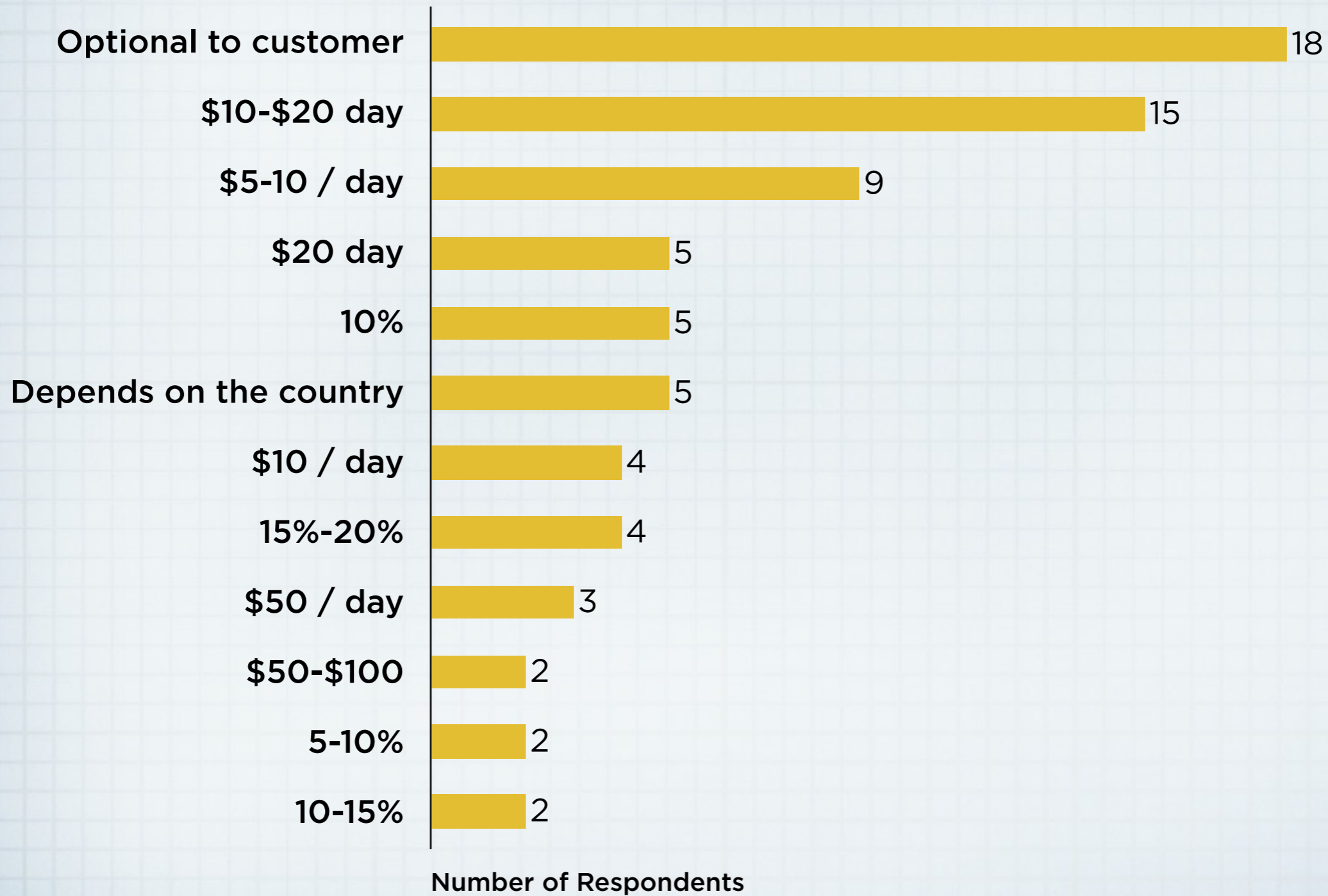


# Is it customary for guides to receive gratuity from travelers on your trips?





# Guidelines on Tipping Guides



# Other Tipping Recommendations

## One Respondent Selecting

- \$4-6 USD / day
- \$10-30 USD / day
- \$15-30 USD // day
- \$30 USD // day
- \$60-80 USD // person
- \$120 USD // person
- 2-3%
- 4% +/-
- 5%
- 2 GBP / person
- 2-5 Euro a day
- 10 Euro a day
- 50-100 Euro for 6 days

# Full Time Staff in 2013

7.3

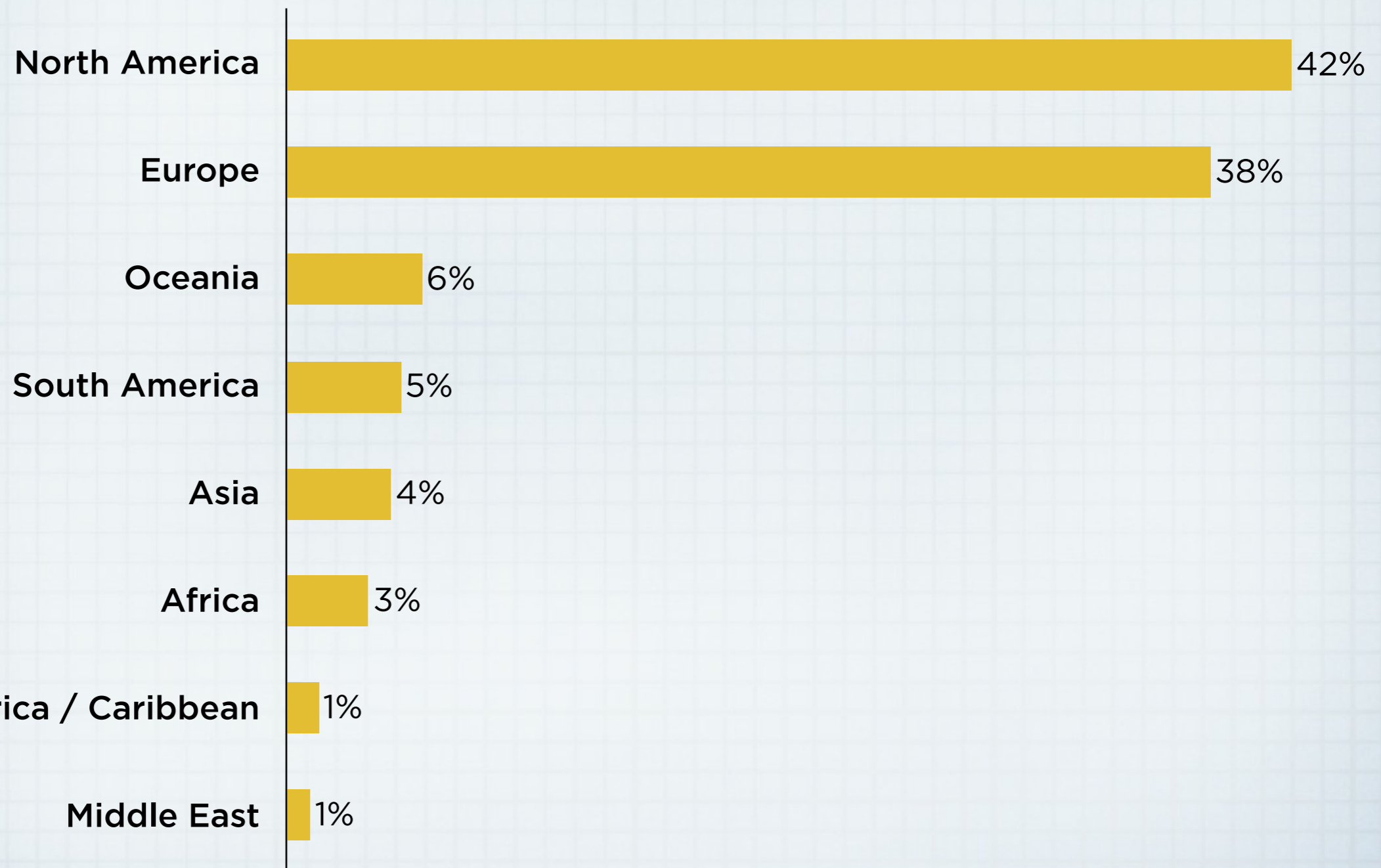
AVERAGE FULL TIME  
EMPLOYEES

# Non-Staff Sub- Contractors in 2013

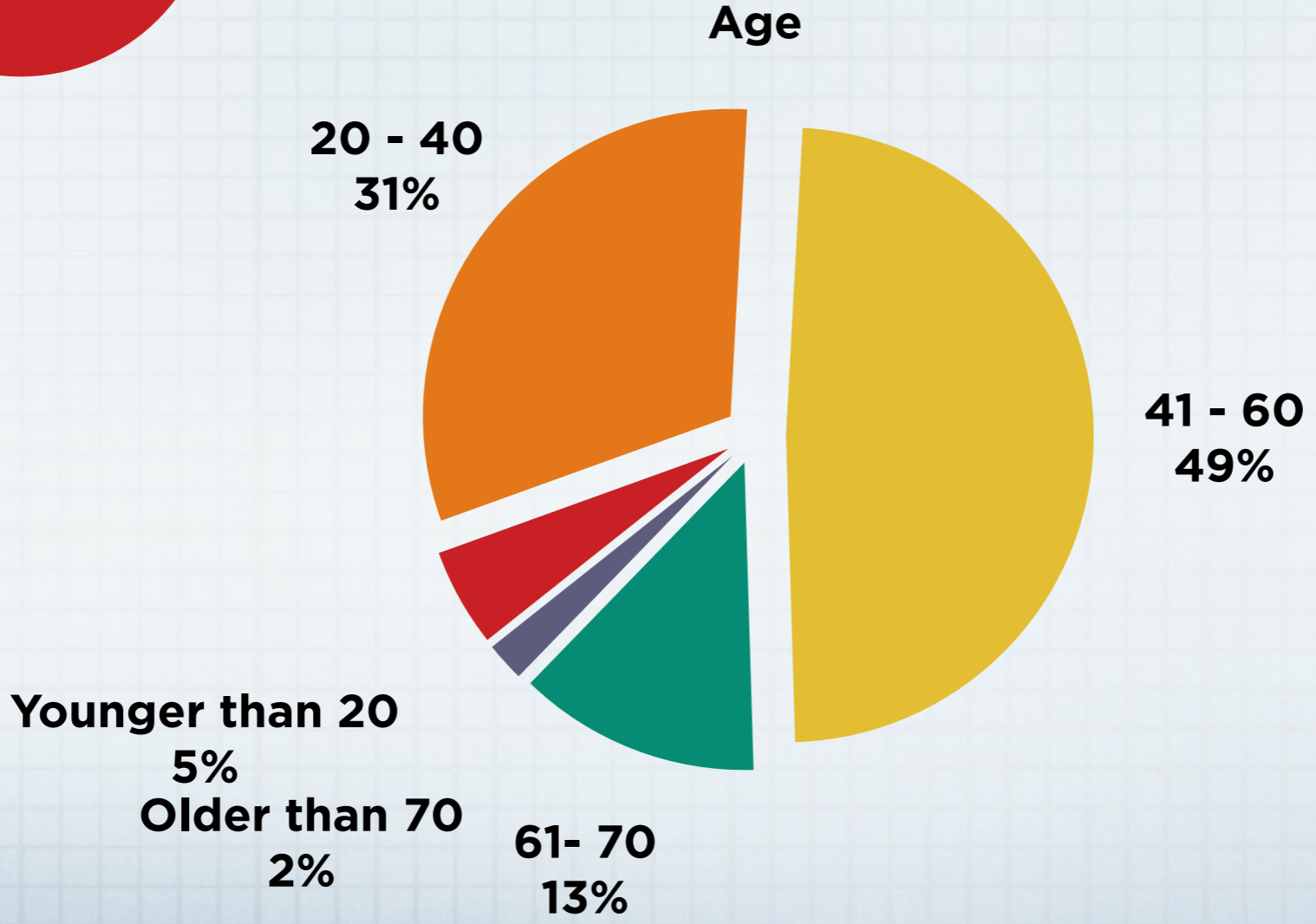
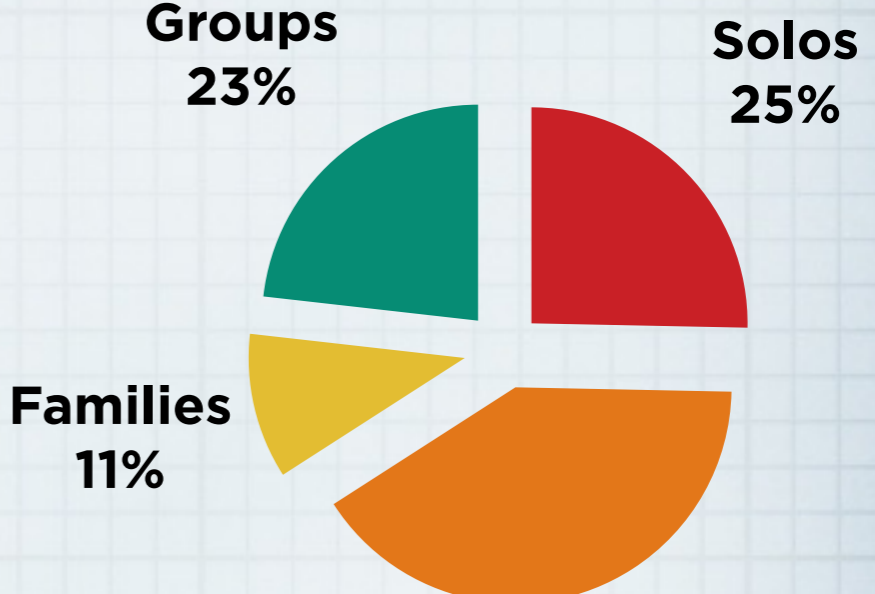
11.5

SUBCONTRACTORS

# Booking Origination in 2013



# Customer Demographics



# Itineraries of Changing Customer Interest

Higher scores correspond with increased customer interest in activity

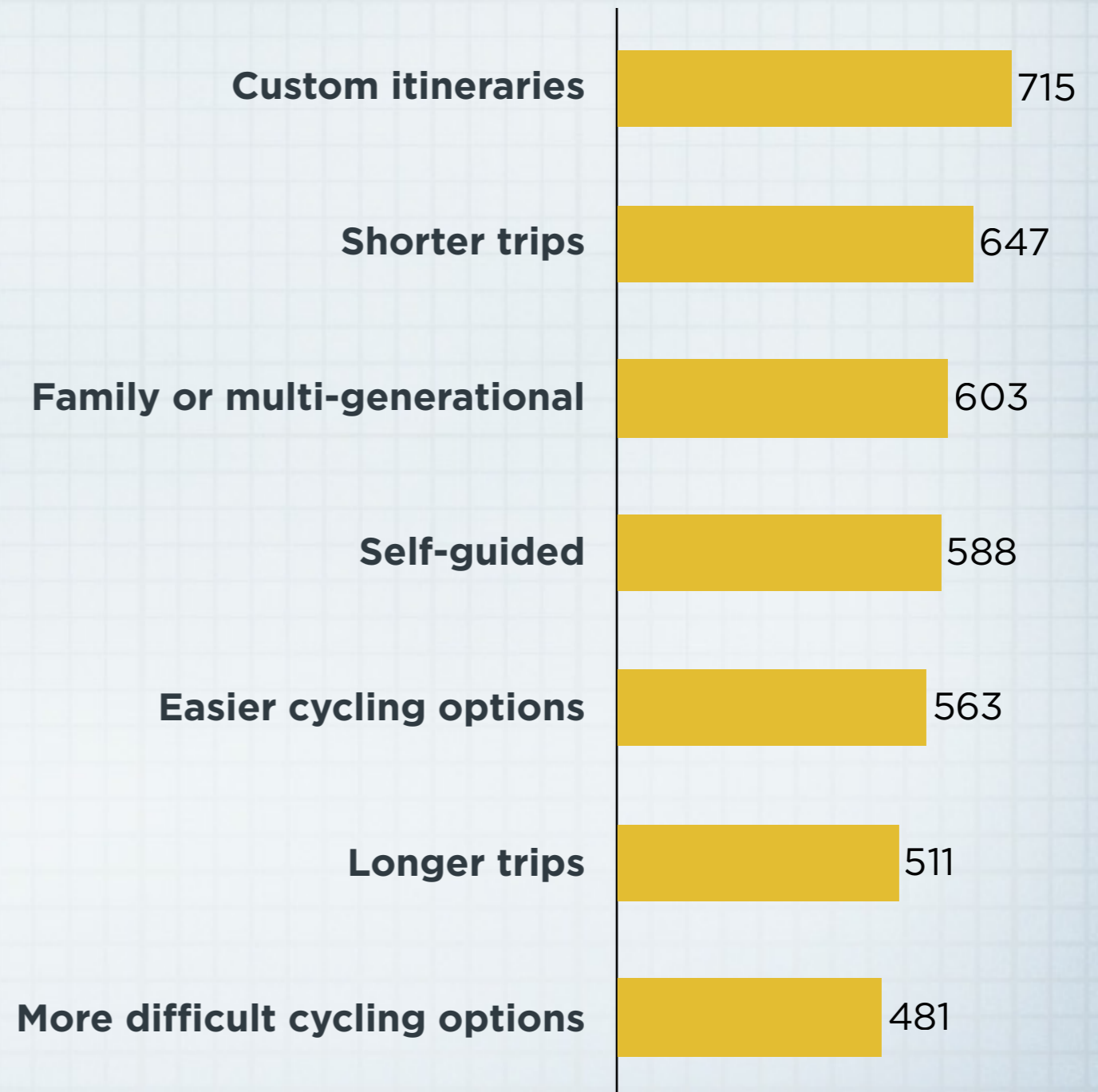
## Index Key

100% Increase in Interest = 1,000

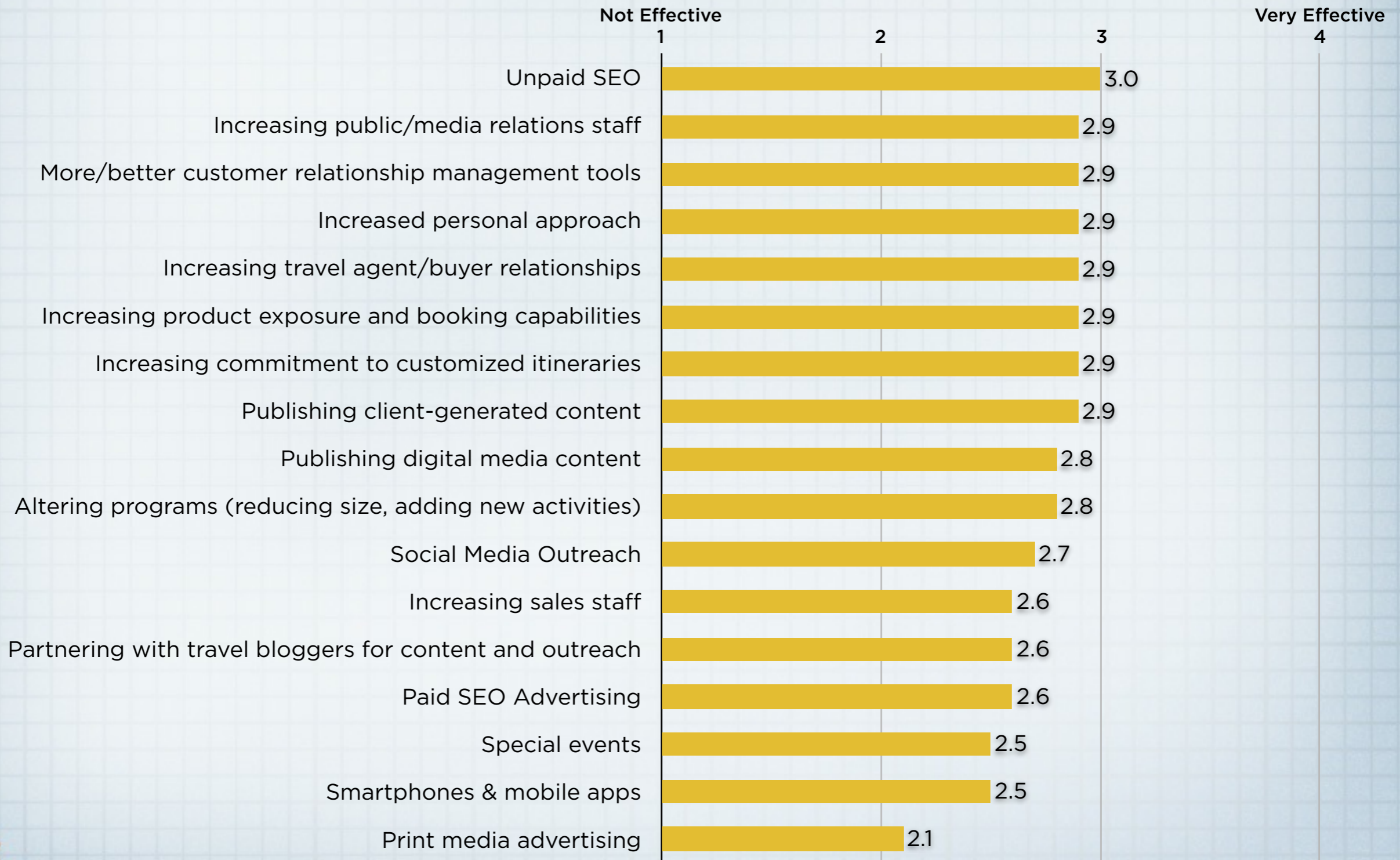
No Change = 500

100% Decrease in Interest = 0

'Not Applicable' responses were not tabulated in this chart



# Effectiveness of Strategy to Drive Customer Bookings



# **Addendum**

**Please describe any risk management practices you follow to ensure safety and compliance with national standards on your trips?**

**Please consider addressing the following points: equipment, trip design, guide/staff training, marketing/administration (liability forms etc), contractor/operator management.**



# Addendum

## Page One

- All our bikes are in top condition at all times
  - The trips are designed to go through minimum traffic areas.
  - We have a lead vehicle in case of big groups
  - We provide marshals in case of big groups
  - All guides are trained in leading groups as also in maintaining and repairing the bikes
1. All guides are CPR/First Aid certified.
  2. Have guide training every two years.
  3. Hire a local guide who owns the bikes and is a mechanic.
  4. Have liability waivers.
1. all our trip leaders are trained on First Aid
  2. all our trip leaders are trained for emergency medical needs.
  3. We list all the hospitals and police helpline numbers en route.
1. Release form
  2. Discuss with clients previous experience and describe routes with traffic.
  3. safety talk for each client
  4. bike maintenance program
  5. trip design
- 1st aid / CPR certification  
Staff training  
Safety talks with clients  
Liability waivers
- 50-page risk management plan, staff training
- All bikes are regularly checked and serviced. All routes are regularly inspected and we avoid busy traffic routes.  
There is a back-up vehicle provided for all the bike tour.  
Staff & guides trained in first aid.

- Staff carry basic tools / spares.  
We have a public liability insurance.
- All clients sign waivers. Senior guide has WFR certification. Helmets required.  
All guides are qualified, have done advanced First Aid courses. For high altitude biking we always carry oxygen supplies, first aid kits
- All passengers sign waiver forms, all guides know CPR, emergency telephone numbers, all routes are carefully vetted before taking clients on them. ALL our trips are professionally guided  
All risks are managed according to SA regulation
- All safety equipments for a bike ride  
Trips are designed keeping in mind the safety, avoid crowded roads, mainly cycle on the backroads  
All staff are trained on bike maintenance and first aid  
All clients are asked to sign a disclaimer before the start of the tour and any risk taken is entirely their responsibility
- All staff are Mountain Bike Leader qualified, first aid qualified, are local to the country they operate in.
- We require our partners to sign up to our operating standards and a customer/supplier agreement.
- We are fully covered by liability insurance, bonded with full financial protection by ABTOT.
- At point of booking we suggest that clients should insure their holiday.  
We also give them a 'Suggested Packing List' which includes a Cycle Helmet.

- We inform all clients that Cycle Helmets are compulsory in Ireland  
We give all our clients a luminous vest free of charge.  
As all our trips are Self-Guiding - we note in ALL our route notes that they must cycle on the left side of the road & we caution them on dangerous sections of their route within those notes.
- Bike theft: accommodation with safe storage area, provide higher security locks  
Client instructions: give clients instructions on safe riding and common practice rules  
Insurance: clients have to have medical insurance
- British Standard BS8848
- Choice of the right route for the right bikers.  
Good training for our guides on First Aid  
Insure that customers have the right insurance for the biking trip.
- Clients are insured and fill out a liability form  
Our guides do training constantly
- Clients must provide their own trip insurance and sign a liability waiver release. Bike guides are trained in basic First Aid and all overnight guided biking trips have vehicle support for emergencies. Daily bike rentals are independent and at their own risk though we do keep track of what hotel they are staying in and where they are headed so we can find them if they get lost or hurt and do not report back on time.  
Comprehensive. SOPs, inspections, training, briefings etc.  
Daily bike maintenance, guide training, First Aid equipment, satellite phone, liability forms, rider safety briefings  
Detailed risk assessment. tailored itinerary.

- experienced and First Aid trained guides and tour leaders, detailed pre-tour documentation for pax along with training guidelines.  
Emergency numbers always given, client briefing, working with operators who specialize in the business  
Emergency plan in place; evaluate riders' abilities; small guide to rider ratio; support van; adjust itinerary to guests' abilities; liability forms.  
Ensure all bikes are operational, emergency vehicle ready for any accidents and also keep the rooms ready on arrival  
Ensure all equipment is in proper working order, all guides are trained, all routes are safe and known including secondary routes. Clients are fully briefed in technique and safe riding. Liability forms are a prerequisite of our insurance, but we consider this to be not the focus. The focus is on prevention.
- Equipment - fleet rotation software, full time annually trained mechanics, full inventory of anticipated parts needs in stock
- Trip design - 1 week annual meeting with each country's Adventure manager, risk assessment done for every trip, all trip designs and risk assessments are reviewed by the Director, focusing on operationally smart trip design to pro-actively prevent quality issues
- Guide certification annually: CPR, Red Cross First Aid, check inventory of guide First Aid kit, mock trip for guides to practice and show their skills with First Aid / client management / bike mechanics / emergency procedures, shared costs with agents for overseas trainings or agent specific training, bike mechanic training, group management

# Addendum

## Page Two

Staff training - 3 yearly training, 1 company values / customer service / quality management, supplier management training; another adv meeting where all office staff take bike mechanic basics class, agree on SOPs, exchange new trip design ideas / operational best practices, and go on a 2 day mock trip to understand the end product; we also have 1 annual exchange where the staff go and work with another countries team to learn best practices in a top performing destination; in there career each office staff has to shadow one bike trip to understand what our end product is

Marketing / Administration - we have indemnity / liability insurance, we stopped using liability forms as our agents provide those based on the laws in their countries, also we do not collect feedback directly from clients as requested by agents - instead that is provide by the agent

Contractor management - in cases where we do not operate a specialty section of a trip, we have supplier agreements with detailed lists of spare parts, first aid kits, what info guides must provide to clients and how often they provide this info, etc

Equipment (including bikes) is checked before every trip, and repaired/replaced if necessary

All guides have First Aid training, and have cycled the routes previously

All participants sign liability waivers before the trip

Equipment maintenance after each trip  
Trips on dedicated bike paths  
Staff trained in First Aid and bicycle

mechanics  
Security instructions given during per-departure meeting with reminder sheet  
Access to emergency cell phone numbers  
Risk acceptance policy

Equipment maintenance and written protocols  
Standardized Staff and participant training  
Transport training and selection based on safety  
Trip Design and activity timing

Equipment, trip design, guide/staff training

Equipment: regular service of the bikes after each use; repair kit provided; a mobile phone is provided for emergencies  
Trip design: assessment of customer fitness and skill level  
Guide/staff training: First Aid emergency procedures; coaching of local guides by teaming them up with experienced international guides  
Marketing/administration: detailed trip description,

Equipment/bikes are checked every time before leaving our base. Trips are designed to avoid busy roads. We have very good briefings and bike fittings, where we stress about safety in traffic! We do use liability forms, which is signed both by guest and us - after we together check the bike and make sure it is working correctly. Guides participate every year on trainings, our and our partners as well as first aid trainings. Expert guide trained in basic bike repair. Designed routes using GPS.  
Support vehicle  
1 guide for each 8 passengers  
Equipment: bikes, helmets, gloves and water.  
Our guides carry first aid kit, bike kit, radio

and gps.  
Release of responsibility form

First Aid, daily maintenance, staff trained  
First Aid certificated staff, liability forms, national incident database reporting, safety manual and in-house training, compulsory helmets, high visibility vests available, itineraries largely off-road.  
Full risk assessment carried out on all bikes, routes etc.  
Full safety compliance and training for all guides.  
Fully audited safety plan  
Guest signed releases for every guest, lots of insurance

Guests must sign liability waiver.  
Guides trained in CPR and First Aid.  
Guides trained in safe mechanical operation of equipment.  
Guides conduct safety instruction for guests at tour start.  
Trips utilize primarily lightly traveled roads with 3' shoulder or bike paths.  
Sub contracted organizations (kayak/raft trips, etc) are vetted and additionally insured.

Guide with First Aid kit and repair kit for every 5 bikers  
Availability of transport for medical evacuation if required  
Clinics used to test skills and train prior to riding  
Itinerary flexibility to tailor bikers to doable but challenging routes

Guide/staff training

Guides are trained by our company  
Insurance included

Guides fully qualified to national standards  
Additional in-house training  
Full risk-assessment processes  
Independently assessed for health and safety best practice

Health and safety procedures  
Checklists  
Safety briefing before each day

Health and safety training, liability forms, equipment maintenance

Helmet - obligatory (we provide helmets to all customers).  
When we design the trip we always check the distance from the most remote points to the next hospital facilities (we do not chose places that rescue takes more than 45m).  
Guides carry first aid kits and have first aid course.  
We have a welcome meeting with self-guided guests to explain the itinerary and the risks of each one (type of soil, altimetry, length of the trail from place to place, etc).  
We remind the national traffic rules to our customers in case it's need.  
All guests are under our liability insurance.

Helmets compulsory  
Review of cycle routes  
Evacuation procedures  
Safety vests  
Guidance to clients on safe cycle techniques  
Medical forms

Helmets must be used.  
Experience Cycling Guide  
Emed24 - Rescue for all clients  
Bikes service after each trip

I am not aware of any national standards.  
We do a risk assessment - an internal

# Addendum

## Page Three

document that we write up regarding current areas of concern / risk for an impending trip.

We constantly monitor world crises in parts of the world that affect our tours. We do extensive training of tour leaders... minimum training trip length is two months, but is usually 4 months on the road, and in the field training on a tour under direction of tour leader.

We have waivers and forms that we have checked against the ATTAs recommended forms. Trips are designed to avoid war zones and disaster areas... this is easier said than done on tours that cross entire continents in one go. We are not afraid to change the itinerary at the last minute, fly the group over a danger area, cancel stages of the tour, or do anything we need to, to ensure the safety of the group.

Liability forms

1 guide every 4 clients on technical tours.

Evacuation plans.

Communication systems

Wilderness first responders guides.

Liability forms (signature required); a trip specific risks and hazards form (signature required); cycling manual outlining the requirements and expectations for operating our cycling trips; two skilled cycling guides on all trips; support vehicle on all trips; trip orientation and daily briefings outlining the route for the day and other specifics, etc  
Liability Forms, risk assessment sheets  
Liability forms, staff training , equipment check, clients training and guidance  
Liability forms. trained guides. First aid.  
Liability waivers; helmets mandatory  
Newer bikes, provide consistent maintenance/safety checks, providing clients thorough safety briefing and rules of

road, staff training regarding safe cycling, CPR / First Aid certified guides, van/driver support on the road, mandatory helmet use  
Online liability form

Our risk management plan covers maximum daily mileage, traffic conditions, hours to ride in, guest capabilities. Staff are screened and most come with significant cycling history. All guests sign a waiver.

Personal Guide/ Trainer throughout the tour  
Pr-departure materials cycling and travel safety, liability form, staff training travel and cycling safety and First Aid, orientation talk cycling and travel safety, daily briefing on safety issues, consideration in route selection, logistics and accommodations.

Quality certification Iram sector 42530  
Regular bicycle maintenance, staff training, clients sign indemnity forms

Regular maintenance of equipment, mechanic check-lists. Staff training and company best practices manual

Release forms, DOT compliance, First Aid and CPR and drivers medical card for guides, permits on public lands

Resume, medical, prior experience, daily communications, own SAR

Risk Assessment continuously updated  
Risk assessment for all trips; staff training  
Risk assessments

Risk Assessments

Staff training

Operational handbooks

Observer/H&S assessments

Guide rations

Support vehicles

Maintenance checks

Bike fitting

Risk management plan, guide training, waivers, contracts

Route review: we review our routes on an annual basis. We digitally map our routes, talk to others with similar routes and talk to locals. If needed, we will send full time staff to review the route in person.

Equipment: equipment is checked by a mechanic before going out on the program, by our guides when they gather specific bikes for a trip and by our clients on a daily basis.

We have a liability form that addresses the risks associated with cycling.

Routes are designed to be away from car traffic as much as possible. Annual staff trainings including lessons on safety. Working with vendors that ensure newest bikes or can provide support on site. All participants have to sign release of liability forms.

Safe equipment

Excellent guides

Staff training

Staff training and manual to comply with Occupational Safety and Health Act  
Staff Training, League of American Wheelman guidelines, waivers, safety bike checks, helmets, trip design, van boosts in certain areas

Staff training, trips design, road safety training

Standard guidelines as outlined by Costa Rica's Adventure Tourism regulations - use of Liability/Waiver Forms - proper guide training in safety procedures - contract with local private paramedics company  
Standard risk management: selecting the right agents and equipment, helmet policy, insurance. guide training.

Standard risk management plan

State of art equipment, well trained leaders, support vehicle

The 3.5 hours Township tour of Katutura in Windhoek by bicycles, is guided by local qualified guides, with sound knowledge of the areas we visit. The tour is at a relaxed pace and designed for leisure and tourism purposes. The guides are equipped with First Aid Certificates and a tour briefing on safety and road usage/sharing is given each time a tour goes out. The tour includes Bicycles, Helmets, Reflector Jackets, Pump, Tool Kit and a First Aid Kit. Katutura is insured for Public Liability and guests have to fill out the indemnity form before the tour begins. I also advise our guests to make sure they take out a personal insurance before traveling. There is an emergency vehicle to assist with any break downs as such while the tour is in process. All the bicycles are less than 3 years old and are fully serviced twice each month. Too many to describe here but we take all of your points into account. Too many to list - 'significant'

Tour leader training

First aid

Health and Safety

Trained Guide hired for the trips in Soweto South Africa who briefs the riders on safety and control the group.

Trip Design, Equipment

Trip design, staff training, participants information, medical training of staff

Trips are self guided - no guides.

Equipment - checked and maintained after each trip.

Trip design - driven to lake and clients cycle back along same road. Little choice due to

# Addendum

## Page Four

our location.

Administration - clients sign forms

Marketing - website but emphasis on hotels, etc locally.

Use of good equipment

Varies from country to country

Waiver, first aid training, defibrillator, sat communication devices.

Waivers

Safety talk

No headphones

Require helmets

Careful route selection

Good bike mechanics

Staff training

Walk around check every day on each bike, weekly service, Yearly parts change, 5 yearly bike change average.

Disclaimer Forms Provided

We address all areas. Training, certifications, liability laws. Supplier contracts. Bike maintenance, equipment quality, mechanic training, guide training. We have international lawyers and a risk management plan.

We brief local laws before renting and guide our customers about safety aspects. Our guide goes along with them.

We ensure the bikes are maintained in a professional manner with proper procedures to be followed. We ensure our guides are fully trained in First Aid (to level recommended), are expert bikers and mechanics and we run regular training exercises for them. Trips are designed with safety and security taken into full consideration.

We follow all the mentioned points in order to prevent and deal with any accident. Prevention is the main objective of our tours, after an incredible cycling vacation

We follow all World Outfitters & Guides standards per our licensing agreement with them. Guides have CDL licenses and are certified in first aid, CPR, food safety and wilderness medicine. We follow all guidelines required for our National Parks permits. Guests sign National Parks release and liability forms as well as our in-house release form. Staff undergoes yearly training and re-certification.

We follow Brazilian standards for cycling activities. Done by ABETA.

We follow the Brazilian ABNT Norms on adventure tourism and cycle tourism. Our guides pass through an apprentice period with the owners/experienced guides.

We have a certified bike mechanic on all of our trips. We never recommend a hotel or cycling route unless we've experienced them firsthand. We've had the same team of loyal staff for many years. Liability forms and Guide Contracts.

We have a comprehensive risk management process for each trip and our entire business.

We have all customers sign liability waivers. We require our staff to go through training for bike fitting and bicycle mechanics. We make sure if we provide routes that they are on comfortable and safe roads (no highways)!

We have been running cycling Safaris for nearly 25 years! Thankfully without incident! We brief cyclists daily & the night before on what to expect. We Guide all trips with guides. We design the route in safe areas away from busv roads but close to or in

wildlife areas. We ask for Liability forms to be read & signed. We slow oncoming vehicles by waving Red Flags.

We have guides. Topography is chosen carefully, a van accompanies always so that if anyone does not want to bike due any problem (physical or psychological), they can travel in the van. The terrain safety is seen, the bikes used are specially meant for Biking tours only that are strong for mountain riding as well, a guide always accompanies, good food is ensured.

**WE HAVE OUR ON SAFE OPERATIONAL PLAN**

We have standard operating procedures adopted by our National Adventure Association - everything you mention above is covered

"We have to comply with French regulations (training of guides)

Super qualified mechanics

We try to assess prospects' skills before selling trips.

We implemented a Technical Safety Standard

We lack a lot about this. Our guides know First Aid and we are careful about weather. We do liability forms but we need more training. This is new in Colombia and there's nobody in the country who knows about this.

We organize every year trainings for our Guides.

All equipments must be always with the Guide in the support van. First Aid is a MUST for us also.

We rent out bikes / equipment that is it. We require First Aid and CPR from all guides. We provide a safety briefing at the beginning of all tours. we have clients sign

liability waivers and retain liability insurance. We require our guides to go through our own training before going on tour to understand our safety practices. We make sure to not cycle on busy roads.

We run a Safety Gestion System according to Brazil's 'ABETA Safety Adventure'. It gives us standards on our operations and also a Emergency Plan. We are a small company, so everybody is integrated with that. We train our biking guides in First Aid and in mechanical issues.

We use SAG wagons for all our tours, guides must do a training tour before the start guiding, all guides must have Wilderness First Responder certificate, drivers and guides have radio communication, all routes are scouted beforehand and are tracked with GPS device, basic accident insurance is mandatory, tour operator must be accredited to operate bike tours with tourism national authority, all clients have daily briefing about each ride and road safety, we do not ride on highways or roads with high traffic, each client signs a registration form and waiver, all our bikes are sent to our bike mechanic after each tour for cleaning and check-up (specially breaks and gears), every year drivers and guides have bike mechanic training camp just before our bike season begins.

Well maintained bicycles

Trained guides all first aid/CPR certified

Safe roads

Obligatory helmets

Liability forms

WFR training course for all guides. National tourism board certification.

Permanent service to bikes and vehicles.

Wilderness first responder on all trips.

# Addendum

## Page Five

Waiver/release forms signed by clients.

Yes, we do regular risk assessment processes on road safety, local environment of the areas and equipments we use on the cycling trips and make changes in the trip itineraries wherever necessary as per the updated evaluation of risks involved, if any, for our clients on the respective cycling itineraries.

We have also a schedule annual training courses for our biking leaders which include leadership skills, duty of care policies, leading techniques in road terrain, managing dietary, drink and recovery options for participants riding over consecutive days. These courses also include applied skills on theoretical and practical navigation in road terrain using map and speedometer, preparatory and roadside maintenance, instructions for group riding skills for road terrain, emergency procedures in road terrain including practical application, safety in road terrain, First Aid and CPR course, and code of conduct and sustainable travel.

# BICYCLE TOURISM 2014 SURVEY

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