

# Cycling tourism from Europe

Europe is a key source market for cycling tourism. Germany offers good opportunities, as well as smaller countries, like the Netherlands and Denmark, where cycling is relatively popular. Cycling holidays can be centre-based or touring. Safe cycling routes, good cycling infrastructure, quality material, cycling-friendly accommodation, luggage transport and knowledgeable guides are basic requirements. E-bikes and customised itineraries are increasingly in demand.

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## 1. Product description

Cycling tourism refers to leisure trips where cycling is the main purpose. The bicycle in this context is therefore not just a means of transport, but an integral part of the travel experience. Cycling tourism can be centre-based, where people are based in a particular location for several days and go out for day rides from there. It can also be a tour, where cyclists stay at different locations along the way.

The intensity varies from soft cycling, enjoying the scenery while gently pedalling on a bicycle, to hard-core cycling, where physical fitness is the main goal. Cycling tourism is considered a form of soft adventure or sports tourism.

### Tip:

For more information on adventurous travel in general, see our study about [adventure tourism](#).

## Health and safety measures

When European adventure tour operators and travellers consider new destinations, they first check the safety. This is one of the most important requirements of cycling travellers. Safety includes aspects such as safe equipment, safe cycling areas and safe cycling routes. For example, traffic-free routes or routes with low traffic density are a plus.

### Tips:

Pay attention to safety measures. Tour operators should, for example, regularly check vehicles and equipment, as well as hire experienced guides that know the area. Accommodation establishments should have safety measures in place such as smoke detectors, fire extinguishers, emergency exits, first-aid kits and 24-hour medical assistance.

Team up with local authorities and other tourism stakeholders on local safety issues for cyclists. For example, cooperate on safe cycling trails, safe bridges or other crossings, and good signposts.

Show the outcomes of safety checks and licences to your clients.

## Political stability

Safety is important to European travellers, especially because some developing countries are politically unstable. Most commercial tour operators do not offer holidays to countries that their Ministry of Foreign Affairs has declared unsafe. This has previously led to a drop in tourism arrivals to countries such as Mali, Egypt and Kenya.

### Tips:

Keep (potential) customers updated on changes in the safety situation in your area, for example via your website and staff. Be open and honest in your communication concerning which areas are safe, or where safety might be an issue. Your client has plenty of information sources too.

Share safety experiences from customers on your website. Let them write about how safe they felt, because people value the experience of other travellers.

If your region is “unsafe”, commercial tour operators will probably not go there. In this case, focus on volunteer organisations and individual travellers. Check your country’s current safety status on the Ministry of Foreign Affairs website of your target countries, such as [Ireland](#) and the [United Kingdom](#).

## Cycling infrastructure

Good cycling infrastructure is another main requirement of European cycling travellers. This includes such things as:

- a variety of cycling routes and tracks
- good road surfaces
- clear and consistent route signage
- route maps
- information material regarding sightseeing
- cycling maintenance shops.

### Tips:

Invest in improving the cycling infrastructure in your area.

Develop new short and long-distance leisure cycling routes. Create (digital) booklets or guide books that provide practical information on the routes, accommodation and facilities.

Link your business to existing cycling tourism routes.

Besides offering bicycle rental, also offer other relevant bicycle equipment, such as helmets, tool/repair kits, locks, transport bags, water bottles, maps and/or child carriers.

## Good-quality material

European cycling tourists are used to high quality standards. They expect bicycles and related material of a good quality at their holiday destination.

### Tip:

Invest in good-quality equipment to meet the quality expectations of European guests.

## Cycling-friendly accommodation and luggage transport

European cycling travellers prefer to stay in accommodation with cycling-friendly facilities. This includes facilities such as secure bicycle storage and bicycle repair, as well as specific route information. They also appreciate breakfast options with a lot of calories, such as oatmeal, pancakes, pasta, bacon and eggs. In case of cycling tours where travellers stay at different locations, they expect their luggage to be transported from accommodation to accommodation.

### Tip:

Offer cycling-friendly facilities such as luggage transport and clearly communicate this in your marketing.

## Knowledgeable guides

For guided cycling trips/tours, European cycling tourists require their guides to be knowledgeable on topics such as first aid and bicycle repair. They should also be able to share information about the local nature and culture.

### Tips:

Make sure your tour guides have good knowledge of first aid and bicycle repair, as well as local nature and culture.

Provide guides with good English language skills. If you can offer guides with additional language skills, such as German, French or Italian, this is always an advantage.

## Traveller profile

European cycling tourists:

- are slightly more often male
- are often aged 40–60 years old
- are generally well-educated with higher incomes
- usually enjoy cycling as a form of sport or physical exercise
- like to be close to nature
- often travel in couples or small groups

- often arrange their travel and accommodation themselves.

There are [four main segments of cycling tourists](#), based on the frequency of their leisure cycling:

### **Infrequent leisure cyclists**

These are people who do not (have the opportunity to) cycle often in their daily lives. They usually cycled regularly as children, but less in adulthood. Infrequent leisure cyclists may not even have a bicycle, but if they do, they probably hardly use it. They are especially interested in low-traffic cycling and packaged cycling holidays, as a means to see the scenic countryside at a moderate pace. This is a large segment within cycling tourism. It also includes families with young children.

#### **Tips:**

To target infrequent leisure cyclists, offer packaged cycling holidays with low-traffic routes and not too many kilometres per day.

Include rental bikes, as well as additional equipment such as helmets and panniers (bags).

### **Occasional leisure cyclists**

This segment includes people who cycle for pleasure several times a year, mostly during summer. They are especially interested in centre-based day cycling rides of 30–40 km, preferably on quiet country roads and low-traffic paths. This large segment especially offers opportunities for day cycling trips as an additional activity (add-on).

### **Frequent leisure cyclists**

These are people who like to go leisure cycling every (other) week during summer, and possibly at least once or twice during winter as well. As frequent leisure cyclists are more used to cycling, they can manage somewhat longer rides. They are especially interested in centre-based day cycling rides of up to 40–60 km, on quiet country roads and low-traffic paths.

#### **Tips:**

To target occasional and/or frequent leisure cyclists, offer circular day routes on low-traffic cycling paths.

Promote cycling day activities on the spot to attract occasional or frequent leisure cyclists. For example, place leaflets in local accommodations, restaurants and shops.

Integrate cycling day excursions in existing tourism packages and offer cycling tourism activities as an optional add-on.

### **Cycling enthusiasts**

This segment includes people who go leisure cycling at least once a week, whatever the time of year, although perhaps less often during the winter. These experienced cyclists generally bring their own bicycle on holiday. They are especially interested in longer day rides of over 60 km and independent cycling tour trips. Cycling enthusiasts usually plan their own rides, using (digital) cycling route maps. Although this is the smallest

segment, they are most likely to go on a cycling holiday abroad.

### Tips:

To target cycling enthusiasts, offer longer day routes. These can be both centre-based (one accommodation) and linear (various accommodations along the route).

Provide cycling-friendly facilities, with cycling route information, secure bicycle storage and bicycle repair services, for example.

Provide up-to-date information on [bicycle transport guidelines of airlines](#), as most cycling enthusiasts want to bring their own bicycles.

Provide information on difficulty, such as cycling distance and hours per day, elevation and type of road surface.

## 2. Which European markets offer opportunities for cycling tourism?

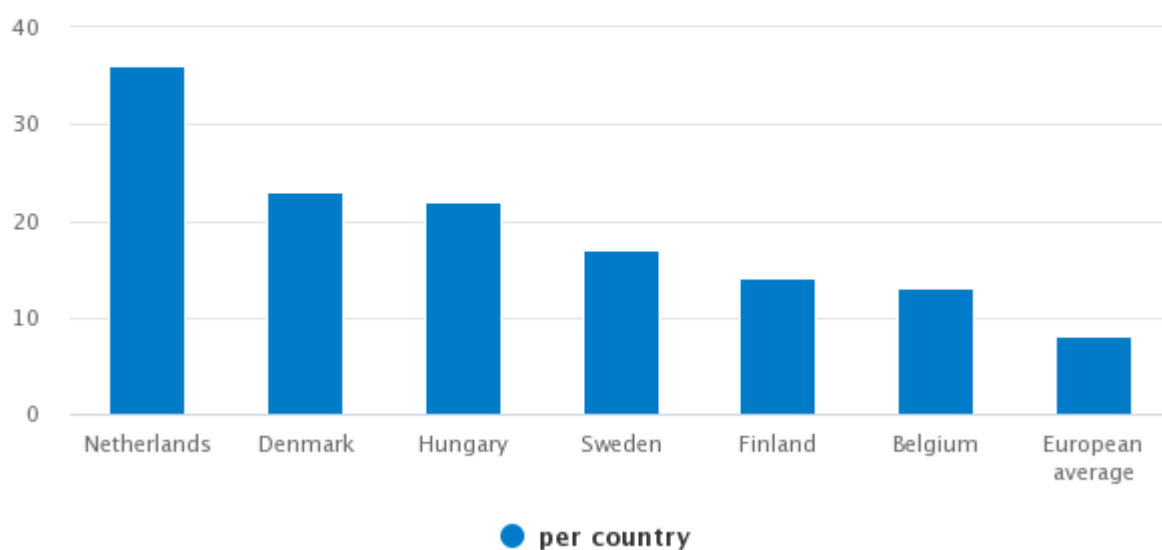
### Europe is a leading source market

Europe is a key source market for adventure tourism, including cycling. Adventure tourism is a large and growing market. The ATTA estimates [the international adventure travel market can be valued conservatively at €580 billion in 2017](#), with an average annual growth rate of 21% since 2012. Within adventure tourism, cycling is booming. For 2017, [Pinterest noted a 142% increase in interest in bike tours](#). This accessible type of physical activity is one of the most popular types of adventure travel.

### Bicycle use is highest in smaller markets

Figure 1: Percentage of population with a bicycle as their most-used mode of transport

in %



Source: Eurobarometer

The use of bicycles indicates the importance of cycling in a country. [Bicycles are the most frequently used mode](#)

of transport for around 8.0% of Europeans, representing around 41 million people. This share varies considerably between European countries. People in the Netherlands are by far the most likely to use a bicycle, followed by Nordic countries such as Denmark. Although these countries are relatively small, their cycling habits make them interesting target markets for cycling tourism.

As most people (56–71%) in the Netherlands, Denmark and Finland cycle several times per week, these countries are especially interesting source markets for occasional or frequent cyclists' holidays. In Hungary, Germany, Sweden and Poland, 43–45% of people also cycle more than once a week. Although cycling trips are popular with infrequent leisure cyclists as well, countries such as Spain, Portugal and Greece, where most people never use a bicycle, may be difficult source markets.

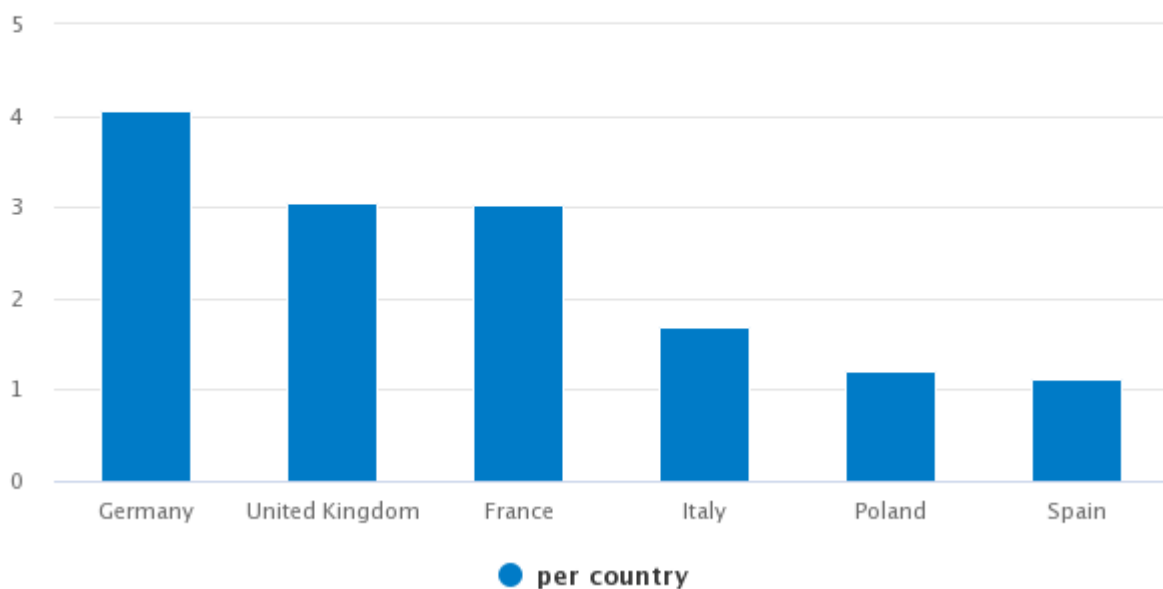
### Tips:

Target European countries where everyday cycling is common, as they tend to be most interested in cycling tourism.

Travellers from these high-potential countries are experienced cyclists, therefore you should include activities for occasional/frequent leisure cyclists.

## Volume makes larger markets interesting

Figure 2: Bicycle sales per country  
in million



Source: Confederation of the European Bicycle Industry

Around 20 million bicycles are sold in Europe every year, with the highest sales in Germany. This is a large market where cycling is relatively popular. Some 44% of Germans cycle more than once a week, and an additional 26% cycle less often. As such, Germany is a promising source of both infrequent and occasional or frequent leisure cyclist travellers.

Other large countries, such as the United Kingdom and France, may also be interesting target markets. However, around two thirds of all British never cycle, and more than half of those that do cycle only a few times

a month or less. The French show a similar pattern. This makes these countries particularly suitable for cycling tourism packages aimed at infrequent leisure cyclists.

### Tips:

Target both infrequent and occasional or frequent leisure cyclists in Germany.

Study your options in other large markets, such as the United Kingdom and France. Include packages for infrequent leisure cyclists, as many travellers from these countries do not cycle often.

Cooperate with national cyclists associations such as [Cycling UK](#), especially when targeting markets where relatively small shares of the population use bicycles.

For more information, see our study about [European demand for tourism in developing countries](#).

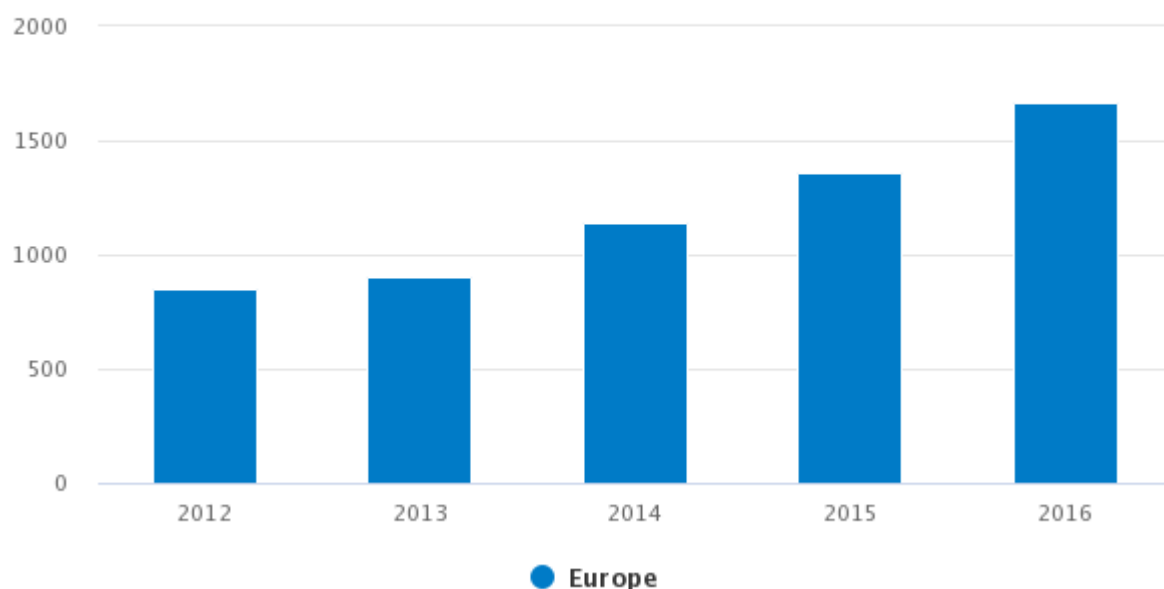
## 3. What trends offer opportunities on the European market for cycling tourism?

### E-bikes

Electric bicycles, or [e-bikes](#), use rechargeable batteries to assist cyclists with a small electric motor. E-bikes are particularly suitable for holidays, as they allow people who do not share the same level of fitness to enjoy cycling activities together. They help cyclists ride longer distances per daytrip, and navigate routes with uphill sections more easily. This makes a wider range of destinations accessible to a wider range of cyclists, including senior cycling tourists.

Figure 3: E-bike sales in Europe

in thousands



Source: Confederation of the European Bicycle Industry

The popularity of e-bikes is increasing rapidly in Europe, partly due to the ageing population. Sales increased with an average of 18% per year since 2012, reaching 1.7 million in 2016. At over 600 thousand units, e-bike sales are highest in Germany, followed by the Netherlands (273 thousand) and Belgium (168 thousand).

### **Tips:**

Include e-bikes in your product rental range, especially if you wish to target [senior travellers](#).

Offer e-bike-friendly facilities, for example secure bike storage with a charging station.

Clearly advertise that your more challenging routes may also be suitable for e-bikes.

## **Increased customisation**

European cycling tourists increasingly demand customised cycling itineraries instead of standardised programmes. This trend applies especially to more experienced cyclists and more mature tourism source markets in northern and western Europe. These cyclists like their holidays to be tailored to their personal wishes and needs, such as their special interests, fitness level, group size, schedule and/or budget.

### **Tip:**

Be flexible. Offer customised cycling itineraries and/or different modules that travellers can combine to create their own unique trip.

## **Family or multi-generational trips**

[Family-friendly trips are in high demand among adventure travellers](#), including cycling travellers. A popular type of family holiday is multi-generational travel, where grandparents, parents and children travel together. The aging European population and the better physical shape of seniors encourage this trend. Many seniors see travel as an excellent way to create unforgettable memories with their children and grandchildren. E-bikes make cycling holidays especially suitable for family travel.

### **Tips:**

To target multi-generational travellers, be flexible and offer customised itineraries. Include separate modules that families can add on to their existing holiday, such as one-day cycling trips.

Include bicycles, helmets and other equipment for various age groups in your product rental range.

Provide family-friendly accommodation, for example with adjoining rooms, a playground or a pool.

Offer family-friendly activities for different interests, skill levels and ages. This way, you appeal to all family members.

For more information, see our studies about [explorative tourism by families with children](#) and [senior travel](#).

## **Cycling experiences as an add-on**

Cycling tourism experiences are increasingly added as part of a holiday programme. Travellers like to combine cycling with other (adventurous) activities, wellness experiences or cultural holidays. River cruises for example,



take along bicycles to offer passengers the chance to explore the shores. Bicycle trips are also increasingly added to city trips as one-day excursions, or longer.

### **Tips:**

Offer one-day cycling trips as part of a round trip or city trip.

Cooperate with local stakeholders to create an interesting variety of activities for travellers at your destination.

## **Increasing use of online research**

European (cycling) travellers increasingly research and plan their trip online. To gather information and share experiences they use:

- peer review sites, like [TripAdvisor](#) and [Zoover](#)
- travel forums, like Lonely Planet's [Thorn Tree forum](#)
- social media, like [Instagram](#), [Facebook](#), [Twitter](#) and [YouTube](#).

Online research is a trend that has increased exponentially over the past years. Although growth has peaked, the use of internet to research tourism will continue to increase. It is predicted to remain the most important research channel for years to come.

### **Tips:**

Maintain a strong internet presence and online marketing strategy, including social media.

Use photos and videos to bring your story to life. For more information, watch this [webinar series on visual communication in adventure travel](#) by ATTA and Libris.

Use current customers as ambassadors for your company and area. Encourage them to share their experiences and visuals on social media, write blogs and review your company.

For more information, see our [10 tips for online success with your tourism company](#).

For more information, see our study about [European tourism market trends](#).

## **4. What requirements should cycling tourism comply with to be allowed on the European market?**

For general tourism requirements, see our study on [what requirements your services should comply with to attract European tour operators](#).

There are some voluntary safety standards for adventure tourism, which are relevant for cycling tourism in particular as well.

## Voluntary safety standards

Safety is extremely important for adventure tourism. Three international ISO (International Organization for Standardization) standards support safe practices in adventure tourism: [21101](#), [21102](#) and [21103](#). Additionally, some countries have their own voluntary standards, such as [BS 8848](#) in the United Kingdom.

### Tips:

Study the ISO standards on adventure tourism. Use them to enhance your safety performance.

Check for possible voluntary standards in your target markets.

## 5. What competition do you face on the European cycling tourism market?

The cycling tourism market is predominantly domestic. For cycling holidays abroad, European countries such as Germany, Austria, Denmark, Switzerland and France are popular destinations. Long haul cycling tourism takes place on a much smaller scale. The most popular developing country destinations for cycling tourism are mainly in Southeast Asia and Latin America.

Popular destinations include:

- Argentina
- Cambodia
- Chile
- Laos
- Peru
- Vietnam.

Morocco and South Africa are some of Africa's best-known cycling destinations. For longer bicycle treks, cross-border trips are also popular. Examples are cycling tours of the Patagonian lake district of Argentina and Chile, and tours from Vietnam to Laos.

### Tip:

In your marketing message, emphasise the unique elements of your cycling offer that travellers cannot find in competing countries.

## 6. Which channels can you use to market your cycling tourism products in Europe?

### Selecting smaller specialised tour operators

Adventure travellers such as cyclists are more likely to use professional services like tour operators and guides than non-adventure travellers, especially when it comes to lesser-known developing countries, or more challenging activities. Tour operators therefore remain the most important trade channel. Smaller European tour operators specialised in cycling tourism or your destination offer the best opportunities.

You can identify relevant tour operators via trade associations, events and databases, such as:

- [Adventure Travel Show](#) – annual adventure tourism trade event, January, London
- [Adventure Travel Trade Association](#) (ATTA) – global trade organisation for the adventure travel industry that organises the Adventure Travel World Summit ([search for members](#))
- [Eurobike](#) – annual bike trade event with a [Travel Talk](#) congress, September, Friedrichshafen
- [ITB](#) – annual tourism trade event with a [Cycling Tourism Day](#), March, Berlin
- [TourNatur](#) – outdoor (cycling) travel trade event, September, Düsseldorf
- [Wanderlust](#) – magazine for adventurous, authentic travel (browse their [tour operator directory](#))
- [World Travel Market](#) – annual tourism trade event, November, London.

Examples of tour operators specialised in cycling tourism are [Biketeam Radreisen](#) (Germany), [Eigen-Wijze Reizen](#) (the Netherlands) and [Exodus](#) (United Kingdom).

## Business through associations

Some European cyclists are members of associations or clubs for cyclists, especially travellers in the cycling enthusiasts segment. These associations can offer direct access to their members and may organise holidays. You can offer them attractive cycling tourism trips for their members, or promote your destination through an advertorial or article in their (online) magazines. The main national associations are listed with the [European Cyclists' Federation](#).

## Generating direct sales

Although European adventure travellers still prefer to book through more traditional channels, it is important to be visible online. It increases awareness of your product/service, your professional image and your trustworthiness. Some cycling tourists do organise their own cycling holidays, especially in the cycling enthusiasts segment. To increase awareness and your chances of direct sales, you can promote your product on (cycling) tourism websites and portals, such as:

- [Bicycle Traveler](#) by [TravellingTwo](#)
- [CyclingAbout](#)
- [Wanderlust](#).

## 7. What are the end-market prices for cycling tourism products?

Travellers have many destinations and types of holiday to choose from. This makes tourism a relatively price-sensitive and competitive industry. The price of a long-haul trip consists of three dimensions:

1. The exchange rate between the currencies of the country of origin and the destination country.
2. The costs of transport to and from the destination country.
3. The price of goods and services the traveller consumes in the destination country.

European tour operators are not open about the purchasing prices of their tourism products. According to industry experts, their margins vary by 10–25%. Prices of holiday packages vary widely as they depend on a lot of factors, such as:

- availability
- destination
- modes of transport
- period of travel
- number of travellers
- length of stay
- type of accommodation
- included activities.

## Tips


Check which countries have cheap (direct) flights to your destination, for instance at [Skyscanner](#). This gives you a competitive advantage in those countries.

You can compare prices for cycling travel products via portals like [Lonely Planet Cycling Tours](#).


Tourism Council WA has some useful [online tools for pricing tours and accommodation](#). These help you determine the break-even point and ideal retail price of your tourism product.

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