CBI Product Factsheet:

Cycling tourism from Europe
Introduction

Europe is one of the most important source regions for cycling tourism. The market is driven by increased demand for active holidays, an increasing interest in ‘green’ tourism activities and growth in countryside recreation and holidays. Opportunities for outbound cycling tourism are expected to be highest in the Netherlands, Denmark, Sweden, Finland and Belgium, as everyday cycling is highest there. Germany and the United Kingdom are interesting markets, too, because of large volumes. Safe cycling routes, good cycling infrastructure, quality material, cycling friendly accommodation, luggage transport and knowledgeable guides are important requirements of European cycling tourists.

Product description

Product definition

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 also an integral part of the tourist experience. Cycling tourism can be centre-based (where people are based in a particular location for several days and go out for day cycling rides from there) or as a tour (staying at different locations). The intensity of cycling activities 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 regarded as a niche market of adventure or sports tourism.

Traveller profile

According to several studies and interviews with cycling tourism experts, some general characteristics of European cycling tourists are:

- They are slightly more often male
- They are generally older (between 40-60)
- They are generally more highly educated people with higher incomes
- They enjoy cycling as a form of sport or physical exercise
- They like to be close to nature
- They often travel in couples or small groups
- They often arrange their travel and accommodation by themselves

Four main segments of European cycling tourists can be distinguished, based on the frequency with which they go leisure cycling:

Infrequent leisure cyclists

These are people who rarely cycle. They are likely to have cycled as children, but have lapsed as cyclists in adulthood. They may not even have a bicycle, but if they do, the likelihood is that they hardly ever 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. It is estimated that this segment outnumbers any of the other segments.

Tips:

- If you want to target infrequent leisure cyclists, focus on offering packaged cycling holidays that include low traffic cycling routes.
- Include bicycle rental in your product offering.

Occasional leisure cyclists

This segment includes people who cycle for pleasure a few times a year, mostly during the summer. They are especially interested in centre-based day cycling rides (between 30-40 kilometres on quiet country roads and low traffic paths). This is estimated to be the second largest segment, which especially offers opportunities for day cycling trips as an additional activity (add-on).

Frequent leisure cyclists

These are people who go leisure cycling approximately once or twice a fortnight during the summer, and possibly at least once or twice during the winter as well. They are especially interested in centre-based day cycling rides (between 40-60 kilometres on quiet country roads and low traffic paths).
Cycling enthusiasts

This segment includes people who go leisure cycling at least once a week, whatever the time of year, although perhaps less frequently during the winter. They generally bring their own bicycle and are especially interested in longer day cycling rides (above 60 kilometres) and independent cycling tour trips. They tend to plan their own rides, using cycling route leaflets for ideas and information. Although this is the smallest segment, it offers interesting opportunities for cycling tourism providers, as cycling enthusiasts are most likely to go on a cycling holiday abroad.

Tips:
- If you want to target the occasional and/or frequent leisure cyclists segment, focus on offering 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 advertising your day cycling tours in local accommodation, restaurants and shops.
- Integrate cycling day excursions into existing tourism packages or offer cycling tourism activities as an optional add-on to existing packages.

Product specifications

The following product specifications are important for European cycling tourists:

Safety

Safety is one of the most important requirements of cycling tourists from all segments. Safety includes aspects such as safe cycling areas and routes (for example traffic-free routes or routes with low traffic density) and safe equipment. Research shows that levels of cycling use are higher in areas where traffic-free cycling routes have been developed.

Tip:
- Focus on developing safe cycling infrastructure in your area. Try to involve local authorities, for example by emphasising the importance of cycling safety and the effect these improvements can have on tourism development in the region.

Cycling infrastructure

Good cycling infrastructure is another main requirement of European cycling tourists. This includes, for example, a variety of cycling routes and tracks, good road surface quality, clear and consistent route signage, route maps, information material regarding sightseeing, cycling maintenance shops, infrastructure at resting places and access to public transport.

Tips:
- Invest in improving the cycling infrastructure in your area.
- Develop new short and long distance leisure cycling routes. Consequently, make booklets/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. For example helmets, tool/repair kits, locks, transport bags, water bottles, maps or child carriers.
Outstanding material

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

**Tip:**
- Invest in purchasing good quality bicycles and related material to meet the quality expectations of (potential) customers.

Cycling friendly accommodation

European cycling tourists prefer to stay in accommodation with cycling friendly facilities. Such facilities include, for example, bicycle storage facilities, bicycle repair facilities, a cyclist breakfast (a big breakfast with a lot of calories, for example pasta, oatmeal, pancakes, bacon and eggs), specific information on routes and luggage transport services.

**Tips:**
- Tour operators should include cycling friendly accommodation establishments in their cycling tourism itineraries.
- Accommodation providers should focus on offering cycling friendly facilities.

Luggage transport

In the case of cycling tours where the tourists stay at different locations, they expect their luggage to be transported from accommodation to accommodation.

**Tip:**
- Include luggage transport in your offering and communicate this in your marketing activities.

Knowledgeable guides

In the case of guided cycling trips/tours, European cycling tourists require their guides to be knowledgeable on several topics, such as first aid, bicycle repairs and local nature and culture. Senior cycling tourists often prefer guides who speak their language and expatriate guides may therefore be preferred.

**Tips:**
- Make sure your tour guides have knowledge of first aid, bicycle repairs and local nature and culture.
- Have 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.

What is the demand for cycling tourism from Europe?

**Cycling tourism is an important niche market**

Cycling is an important niche market within adventure tourism and offers interesting opportunities to generate local trade, particularly for rural areas. According to a global survey of the Adventure Tourism Trade Association, 46% of the revenue of adventure tourism companies was derived from sales of cycling trips or related cycling travel services in 2014. The same survey also indicated that demand for cycling trips is increasing. Reservations for cycling trips between November 2013 and April 2014 were, for 47% of the surveyed adventure tourism companies, higher than the previous year, for 28% the same and only for 19% lower. The main drivers for growth are the general growth in demand for active holidays, increasing interest in ‘green’ tourism activities and growth in countryside recreation and holidays.

**Tip:**
- Focus on developing safe and attractive cycling routes, as this is crucial to realise the growth potential of cycling tourism.
Europe is one of the main source regions

There are no accurate statistics available on cycling tourism at a European level. However, Europe is the second largest source market for cycling tourism after the USA. According to the Adventure Tourism Trade Association, 42% of cycling trip bookings in 2014 originated from North America, 38% from Europe, 6.0% from Oceania, 5.0% from South America, 4.0% from Asia and 3.0% from Africa.

Bicycle usage

The use of bicycles gives an indication of the importance of cycling in a country in general. Around 8.0% of the European population uses a bicycle as the most frequently used mode of transport, representing around 41 million people. Bicycle usage varies significantly between European countries. People in the Netherlands are by far the most likely to use a bicycle, according to research by the European Commission (Figure 1). This makes the Netherlands an interesting target market for cycling tourism. In absolute numbers, Germany takes the lead (Figure 2).

Figure 1: Relative use of bicycle as most used mode of transport, EU28 countries, 2014, in % of the population

Source: Eurobarometer ‘Quality of Transport’ of the European Commission

Figure 2: Absolute use of bicycle as most used mode of transport, EU28 countries, 2014, in million

Source: Eurobarometer ‘Quality of Transport’ of the European Commission and Eurostat
Popular cycling tourism destinations

The cycling tourism market is predominantly domestic. Industry experts estimate that around 10% of cycling trips are undertaken abroad. European countries such as Germany, Austria, Denmark, Switzerland and France are the most popular cycling tourism destinations (Figure 3). Cycling tourism trips outside of Europe take place on a much smaller scale. The most popular long haul destinations for cycling tourism can especially be found in South-East Asia (for example in Laos, Vietnam, Cambodia and Thailand), South America and Africa (Kenya).

Figure 3: Location of offered cycling tourism itineraries, by continent, 2014, in %

Source: Adventure Tourism Trade Association

For information on tourism trade statistics and macroeconomic indicators in the European market in general, refer to CBI’s ‘Trade Statistics’ for Tourism.

Which trends offer opportunities on the European market for cycling tourism?

E-bikes

The popularity of E-bikes is increasing rapidly in Europe, partly due to the ageing European population. In the Netherlands, for example, 10-15% of the Dutch who booked an international cycling holiday in 2013 chose to use an E-bike. This is three times more than four years earlier. An E-bike is particularly suitable for holidays, as people who do not necessarily share the same level of fitness can still enjoy cycling activities together. Furthermore, E-bikes give cycling tourists extra help when cycling the occasional climb and uphill sections, making non-flat cycling routes more accessible. This is especially important for senior cycling tourists.

Tip:
- Include the option of E-bikes in your product offering, as it can really be a persuasive factor for tourists who are deciding on a cycling holiday and increases your chances of attracting senior cycling tourists.

Increased customisation

Cycling tourists are increasingly demanding customised cycling itineraries instead of standardised itineraries, especially in more mature tourism source markets in Northern and Western Europe. Cycling tourism providers in Developing Countries should use this to their advantage by becoming a travel facilitator instead of a provider of standard trips.
Family or multi-generational trips

European tour operators are seeing a trend towards multi-generational travel, also in the cycling tourism market. This trend is expected to continue due to the ageing European population and the stronger physical shape of seniors. Many seniors see travel as an excellent way to create unforgettable memories with their children and grandchildren.

Tip:
- Be flexible by offering the possibility of customised cycling itineraries, or offering different modules that customers can combine to create their own, unique cycling itinerary.

Cycling experiences as an add-on

Cycling tourism experiences are increasingly added as part of a holiday programme. River cruises, for example, include bicycles to offer passengers the chance to explore the shores. Bicycle trips are also increasingly added to city trips as one-day excursions or even longer.

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

For information on tourism market trends in the European market in general, refer to CBI’s ‘Trends’ for Tourism.

Which requirements should cycling tourism comply with to be allowed on the European market?

Musts

No European legal requirements

As long haul cycling tourism is offered outside the European market, no European legal requirements are applicable.

Tip:
- Although European partners will not pass on legal requirements, you have to comply with the legal requirements in your own country.

Additional requirements

Reliability

European tour operators are looking for reliable, professional partners. They therefore often request their partners to adhere to a code of conduct they have set up, generally including health and safety requirements, business ethics and social responsibility. Furthermore, they see membership of national and international sector associations and networks as proof of reliability and professionalism.

Tips:
- Study the codes of conduct of European cycling tour operators and see how they correspond to your business practices. You can adapt your business practices to increase your chances on the European market.
- Become a member of national and international sector associations and networks. For example your own country’s tourism trade association or international cycling associations like the World Cycling Alliance.
Liability

European tour operators increasingly ask partners about the existence of liability insurance to cover possible damage and accidents suffered by customers during their holidays, especially for travel outside Europe. This is because their own liability insurance often does not cover damage caused by third parties. Tourism suppliers that have such insurance have a major advantage over those who do not.

Tips:

- Communicate to your customers the importance of taking out travel insurance, especially if your company does not have liability insurance.
- Take out liability insurance and communicate that you have such insurance. If it is not possible to get liability insurance in your country, push your authorities and trade associations to make such insurance possible. Also discuss this with (potential) partners, as they might have some influence as well.

ISO for adventure tourism

Cycling holidays are considered a niche market of adventure tourism. ISO has developed two international standards to support safe practices in adventure tourism, which can serve as a guideline to improve safety in adventure tourism, including cycling.

Tip:

- Use the ISO standards on adventure tourism to enhance safety performance, meet expectations for participant and staff safety and demonstrate safe practices. Go to ISO 21101 and ISO 21103 for more information.

Sustainability labels

Cycling is generally centred around nature. Sustainability therefore plays a more important role than in mainstream segments such as sun and beach tourism. European tour operators do not directly require sustainability labels, but if they can choose between sustainable businesses and comparable business without a label, they will often choose the sustainable option. Integrating sustainable elements into your product can therefore give you a competitive advantage. There are many different labels available for the global, European and local markets, making it difficult to choose or recognise a label. Examples of global credible sustainable and/or green tourism certification programmes are Green Globe, Rainforest Alliance and Travelife. There are also local sustainability initiatives, such as Smartvoyager in Ecuador and Green Lotus in Vietnam.

Tips:

- Familiarise yourself with the requirements of sustainability certification to understand what is expected from suppliers. Consequently, integrate sustainable best practices, for example policies for efficient electricity, water consumption and waste management. Also mention your concern for sustainability in your promotion. For more information, also refer to CBI’s Product Factsheet.
- ‘European tour operators and their need for sustainable suppliers in Developing Countries’.
- Consider applying for sustainable certification to help you stand out from competitors. Find out if your country has its own sustainability label and apply for it. Make sure that the logo is visible on your website and that your company is visible on the website of the certification body.
- For an overview of other relevant standards for tourism, also check ITC’s Standards Map.

For information on tourism buyer requirements in the European market in general, refer to CBI’s ‘European Buyer Requirements’ for Tourism.

What competition do I face on the European cycling tourism market?

Competition on the European cycling tourism market is based on the same aspects as competition on the long haul tourism market in general. Therefore, refer to CBI’s ‘Competition’ for Tourism for more insights into your competition.

Also refer to CBI’s ‘Top 10 Tips for Doing Business with European Buyers’ for tips on how to prepare your first contact with European buyers or how to improve your existing relationship with European buyers and gain a competitive edge.
What do the trade channels and interesting market segments look like in the European market for cycling tourism?

The trade structure for cycling tourism from Europe does not differ significantly from the trade structure for long haul tourism in general. The most important trade channels for cycling tourism providers in Developing Countries are local inbound tour operators, specialised European cycling tour operators, cycling associations and direct sales. Refer to Figure 1 in CBI’s ‘Trade Channels and Segments’ for Tourism for an overview of the general trade structure for tourism.

Specialised tour operators

The vast majority of European cycling tourists are seniors who often prefer to book through tour operators, especially for long haul destinations. The European market for long haul cycling holidays is fragmented and serviced by a high number of tour operators specialised in cycling. They mostly offer tailor-made tours and need reliable local partners such as inbound tour operators or Destination Management Companies to select packages/tours for them and help them organise the trips. European tour operators that are specialised in city trips or round trips can also be interesting partners, as cycling could be a one-day add-on for such tour operators.

Tip:
- Attend relevant trade fairs in your European target market, preferably focused on cycling, to come into contact with (specialised) tour operators and increase awareness of your destination as a cycling tourism destination. Relevant trade fairs are, for example, the Fiets en Wandelbeurs in the Netherlands, Fahrrad & ErlebnisReisen, RadReise Messe and Eurobike in Germany and the Outdoor Adventure & Travel Show and London Bike Show in the United Kingdom.

Business through associations

Some European cyclists have joined membership associations/clubs for cyclists, especially from the cycling enthusiasts segment. In the Netherlands, for example, over 60,000 cyclists are members of cycling associations/clubs. For cycling tourism providers in Developing Countries there is great value in approaching such clubs. Not only can such clubs organise cycling tourism trips for their members, they also offer direct access to potential customers.

Tips:
- Offer cycling associations in your European target market(s) attractive cycling tourism trips for their members. The most important national cycling associations in Europe can be found on the website of the European Cyclists' Federation.
- Use magazines of cycling associations to promote your destination through an advertorial or article about your destination.

Direct sales

Some cycling tourists organise their cycling holidays by themselves, especially in the cycling enthusiasts segment. They bypass tour operators and contact tourism companies in the destination country directly. They often use the internet as an information source, for example social media and online cycling forums and communities.

Tips:
- Have a professional website with quality photos and videos of your product. Focus on what makes your product and area so unique and include testimonials of previous customers.
- Become active on social media and integrate social media into your website. Make sure content is relevant and up to date. Use the power of photos and videos to help potential customers virtually explore your destination and product and bring your story alive.
- Promote your cycling tourism product through online cycling communities in your European target market(s). For example Wereldfietser in the Netherlands and Radreise Forum and Radreisen Datenbank in Germany.

For information on tourism market channels and segments in the European market in general, refer to CBI’s ‘Trade Channels and Segments’ for Tourism.

Also refer to CBI’s ‘Finding Buyers’ for tips on locating buyers in the European market.
Useful sources

- Bike Europe - [http://www.bike-eu.com](http://www.bike-eu.com) - trade magazine for the European bicycle market.
- European Cyclists’ Federation - [http://www.ecf.com](http://www.ecf.com) - publishes research about the European cycling market, including cycling tourism.
- Nederlandse ToerFiets Unie - [http://www.ntfu.nl](http://www.ntfu.nl) - umbrella organisation for Dutch cycling organisations and clubs. Provides news and research about the Dutch cycling market.

For all CBI’s tourism related market intelligence documents, go to CBI’s ‘Market Intelligence Platform for Tourism’.
This survey was compiled for CBI by Globally Cool in collaboration with CBI sector expert Theo Nagel.