

INTRODUCTION

Cycle tourism is now growing rapidly in the UK, in parallel with renewed interest in personal health and fitness, and with mounting concern over the environmental damage caused by road traffic. The development of the National Cycle Network, with 4,000 miles of route opening in June 2000 and 9,000 miles by 2005, provides both a catalyst and an opportunity for local authorities, tourism promoters and other agencies to define coherent route development and marketing strategies so as to benefit from cycle tourism.



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Cycle tourism in the UK is currently valued at £635 million per year. The potential for growth here is huge - the forecast for cycle tourism right across Europe is £14 billion per year within 20 years. With potential economic benefits at this scale it is not surprising that there is keen interest in how to develop routes to attract visitors and tourists, and how to market these effectively.

The benefits of cycle tourism include reductions in pollution and traffic congestion, economic regeneration and better health. In recognition of this, the Government is providing a strongly supportive policy framework. Both the 1998 White Paper on Integrated Transport and the 1999 Tomorrow's Tourism strategy document call for the development of sustainable transport modes.

This information pack draws on basic research into cycle tourism and the motivation of its participants, and includes examples from both the UK and Europe to show the versatility and the wide range of benefits cycle Tourism can bring. The pack is intended particularly for use by Sustrans' partners in the development of the National Cycle Network.

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1. CYCLE TOURISM DEFINED

Cycle Tourism can be defined as recreational visits, either overnight or day visits away from home, which involve leisure cycling as a fundamental and significant part of the visit.

1.1 TYPES OF CYCLE TOURISM

There are three main types of Cycle Tourism:

a. Cycling Holidays

These are defined as holidays, by both domestic and overseas visitors, where cycling is the main purpose of the holiday. Participants are sometimes referred to in this paper as "dedicated cyclists".

The holidays may be *Long Cycling Holidays* of four or more nights, or more commonly *Cycling Short Breaks* of one to three nights.

There is also a distinction to be made between *Centre-based Cycling*

Holidays based at one overnight place, and *Cycle Touring Holidays* where the overnight stay changes. Cycling holidays can be either self-organised, or organised by a cycling holiday operator as a Packaged Cycling Holiday. The majority of UK cycling holidays are self-organised in both the UK and Europe.

b. Holiday Cycling

This means cycling whilst on holiday, and consists of day cycle rides taken by both domestic and overseas visitors, while on holiday away from home, cycling being one of a number of activities undertaken during the holiday.

c. Cycling Day Visits

These are defined as trips from home, to places outside a person's usual place of residence. These trips may involve setting out from home by bike, or taking the bike by car or train, for a day or half-day cycle ride. Section 1.3 overleaf gives further details of the distinction between tourism and leisure.

1.2 ACTIVITIES UNDERTAKEN BY CYCLE TOURISTS

Information currently available suggests the following main types of cycle tourism activity:

CYCLING HOLIDAYS

• Centre-based Cycling Short Breaks

- self-organised holidays where people are basing themselves in a particular location for two or three days and going out for day cycle rides during their stay;
- the majority of UK cycling short breaks are thought to be centre-based.

• Independent Cycle Touring Holidays and Short Breaks

- cycle tours (either linear or circular) of from two to three days to two weeks' duration, which people plan and organise themselves;
- the majority of UK cycle touring holidays are self-organised.

• Packaged Cycling Holidays and Short Breaks

- cycling holidays (usually circular cycle touring holidays) organised by a cycling holiday operator, either for self-navigation or with a guide;
- the market for packaged cycling holidays in the UK is very small at present;
- there are approximately 70 companies offering cycling holidays in the UK. The majority

are very small companies which have been in business for only a short time. Many cycling holiday companies that have been established have found it difficult to sustain their operations and have collapsed as a result.

Ironically, the market leaders are those companies promoting cycling holidays abroad, such as Susie Madron's Cycling for Softies, Belle France and Bent's Bavaria.

HOLIDAY CYCLING / CYCLING DAY VISITS

Activities undertaken by day cyclists and holiday cycling visitors are very similar.

The two main types of cycling undertaken are:

• Traffic-free Cycling

- where people are cycling entirely on traffic-free cycle paths, which are either linear paths (e.g. The Camel Trail), or circular paths around reservoirs and in country parks (e.g. Rutland Water);
- will often involve cycle hire;
- a particularly popular type of cycling activity for families and inexperienced cyclists.

• Circular Day Cycle Rides

- a circular cycle ride using quiet country roads and/or traffic-free cycle paths;
- the distance cycled usually depends on the level of cycling experience: more experienced

cyclists will tend to cycle longer distances;

- people will either use a published cycle route or will plan their own route, again depending on experience. Most local authorities produce cycle route leaflets for their area, but the content, format and style of such leaflets varies considerably from one authority to the next. There is also a growing number of commercially produced cycle route publications;
- a significant proportion of people going on day cycle rides will put their bikes on the back of their cars and drive to the start point of their cycle ride;
- most people will use their own bikes. A minority will hire bikes. Holiday cyclists are likely to be more inclined to hire bikes.

OTHER

The following types of cycling can also be seen as part of cycle tourism:

- Offroad Cycling / Mountain Biking
- Club Cycling
- Organised Cycle Rides
- Sponsored Charity Rides
- Schools / Youth Group Cycling
- Cycle Racing

There is currently no published research information about these types of cycling tourism activity.

1.3 DISTINGUISHING TOURISM AND LEISURE

The normal distinction is that *leisure visits are made by local residents, whilst tourist visits are made by people away from their usual locality.* Leisure and tourist visitors can be measured as having different spending and transport patterns: tourists will normally spend more, and may require special facilities such as directions, transport and parking. The Leisure Day Visits Survey 1996 defines tourism as "people travelling to... places outside their normal environment" and

specifies that *a recreational visit of more than three hours away from home is defined as tourism.*

This definition is problematic for cycling. Firstly, for leisure riders on cycle routes near population centres the three-hour cut-off is entirely arbitrary. Secondly, cycling uniquely is a form of travel as well as an activity enjoyed for itself. What is being enjoyed - a picnic point outside a local area, or the cycle route to it? Thirdly, cycling is slow. If a family cycles to a pub two miles away for lunch, thus being away from home for over three

hours, is this "tourism", whereas the same trip by car would be "leisure" because it takes less than three hours in total?

We have not attempted to resolve these issues here. We have followed the definition given by the Leisure Day Visits Survey. For our purposes **Cycling Day Visits** therefore include rides of more than 3 hours away from home. **Local Leisure Cycling Trips** are those of less than three hours. Using these distinctions enables easier comparison with other forms of tourism and leisure.

2. THE BENEFITS OF DEVELOPING CYCLE TOURISM

The development of cycle tourism can offer a considerable number of benefits, as discussed below:

- Cycle tourists represent a growing and valuable tourist market, particularly for rural areas. Cycle tourists will spend at least as much in a rural area as other types of tourist.

For example:

The C2C route attracted over 10,000 coast-to-coast cycling holidaymakers in 1997, with an estimated average expenditure of £100 per person per holiday, contributing some £1.1 million to the local economy.

- Cycle tourism is good at generating local trade and offers particular opportunities for rural businesses and services. Spending by cycle tourists can help to support rural pubs, village shops, small-scale rural attractions, and rurally-based providers of accommodation.

Cycle tourism also offers opportunities for the development of cycle hire and cycling holiday operations in rural areas.

For example:

The Tarka Trail in North Devon has generated the establishment of some 10 cycle hire operations along its length.

The C2C has supported the establishment of a successful cycle tour operation and has generated significant additional trade from tourism along the route.

- As cycle tourists will use local businesses, there is a greater likelihood that the money they spend will stay in the local economy.

- Cycle tourism is an environmentally sustainable form of tourism with minimal impact on the environment and host communities.
- Cycle tourism can help reduce excess traffic.
- Cycle tourism makes good use of existing, often under-utilised resources, e.g. country lanes and by-roads.
- Cycle tourism can provide an alternative use for redundant or derelict resources, e.g. disused railway lines.
- Encouraging visitor arrivals and movement by bike can play an important role in visitor and traffic management.
- Cycle tourism can help introduce rural traffic-calming which will further benefit both local people and tourists.
- Cycle tourism can provide new incentives for people to visit an area and can help to attract new types of visitor.

For example:

The C2C route has attracted thousands of new visitors to the North Pennines.

- Cycling can provide added attractions and activity for visitors which will help to extend length of stay and encourage repeat visits.
- Encouraging cycle tourism can help to encourage utility cycling: many people may rediscover cycling while on holiday or as a leisure activity, and may then be encouraged to cycle more frequently for other purposes.
- Encouraging cycle tourism can help to improve cycling provision for local people: the benefits of

encouraging cycle tourism may provide an additional justification for investment in cycle provision.

- Cycle tourism enhances personal health, fitness and well being.

“Encouraging cycle tourism can help to encourage utility cycling: many people may rediscover cycling while on holiday or as a leisure activity, and may then be encouraged to cycle more frequently for other purposes.”

“Cycle tourism helps support rural pubs, village shops, small-scale rural attractions and accommodation providers.”

3. UK CYCLE TOURISM FACTS AND FIGURES

3.1 THE SIZE AND VALUE OF THE UK CYCLE TOURISM MARKET

The following figures (see table right) are Sustrans' best estimates of the volume and value of UK cycle tourism. These are based on an extrapolation of data from national surveys,¹ applying assumed figures and ratios where necessary.

UK CYCLE TOURISM – VOLUME AND VALUE 1997

	TRIPS (thousand)	SPEND (£million)
Cycling Holidays		
Domestic Cycling Holidays	708	104
Overseas Visitor Cycling Holidays	125	38
Total Cycling Holidays	833	142
Holiday Cycling		
Domestic Holiday Cycling	3,200	29
Overseas Visitor Holiday Cycling	950	9
Total Holiday Cycling	4,150	38
Cycling Day Visits		
Total Cycling Day Visits	11,700	105
TOTAL UK CYCLE TOURISM		285
Local Leisure Cycling Trips	102,500	350
TOTAL UK LEISURE CYCLING		635

These figures compare to Sustrans' previous estimate for the total leisure and tourism cycling spend in the UK of £535 million in 1995. However they are not strictly comparable with previous estimates as the basis for extrapolation from the national surveys has been refined in the light of new data.

¹United Kingdom Tourism Survey (UKTS) 1997 - for information on domestic tourism.
International Passenger Survey (IPS) 1997 - for information on overseas tourism.
Overseas Leisure Visitor Survey 1996 - for information on overseas tourism.
UK Leisure Day Visits 1996 - for information on day visits.

3.2 AVERAGE SPENDING BY UK CYCLE TOURISTS

The following figures are given as a guideline for average expenditure per head for UK cycling tourists, as derived from the national tourism surveys and cross-referenced with other research on cycling tourism.

Cycling Holidays	
Domestic Cycling Holiday Visitors:	£146 per trip ² (£30-35 per night)
Overseas Cycling Holiday Visitors:	£300 per trip (holiday) ³
Holiday Cycling / Cycling Day Visits	
Average spend per head:	£9 per trip (day) ⁴
Local Leisure Cycling Trips	
Average spend per head:	£4 per trip (day) ⁴

²Sustrans' estimate derived from UKTS 1997. ³Sustrans assumption. ⁴Sustrans estimate based on expenditure figures for Countryside Visits in UK Leisure Day Visits Survey 1996.

3.3 CHARACTERISTICS OF UK CYCLE TOURISM TRIPS

The following figures for the characteristics of UK cycle tourism trips (as derived from the national tourism surveys) may also be useful:

All UK Cycle Tourism

The majority of UK cycle tourism trips (of all types) are in the countryside at present: UK cycle tourism is essentially rural. Urban cycle tourism is largely undeveloped in the UK as safe cycle access into and out of most towns and cities is generally deficient, or perceived to be so. (The National Cycle Network is being designed to correct this.)

A more significant proportion of Local Leisure Cycling Trips are, however, urban-based, particularly in towns and cities where the cycling infrastructure has been developed.

Cycling Holidays⁵

Average Length of Stay:	
Cycling Short Breaks	2 nights
Long Cycling Holidays	7.1 nights
All Cycling Holidays	4.4 nights

Roughly half (53%) of all UK domestic cycling holidays are cycling short breaks, and half (47%) are long cycling holidays; most of them are centre-based. An analysis of the UK Tourism Survey figures for 1994 suggested that only 11% of domestic cycling holidays were touring holidays. The sample size for this analysis was, however, too small to be conclusive.

“The majority of domestic cycling holidays are centre-based.”

Cycling Day Visits⁶

The UK Leisure Day Visits Survey does not give specific information on the characteristics of cycling day visits. The following characteristics of Tourism Day Visits to the countryside may help to give some insight into the characteristics of cycling day visits.

Average distance travelled to start point	39.3 miles
Average duration of trip	3.6 hours
Average party size	4.6

⁵Sustrans estimates derived from UKTS 1997. ⁶Figures for Countryside Visits for UK Leisure Day Visits Survey 1996.

“UK cycle tourism and leisure spending is now valued at £635 million per year.”

“UK cycle tourism is essentially rural at present. A more significant proportion of Local Leisure Cycling Trips are urban, particularly in towns and cities where the cycling infrastructure has been developed.”

4. UNDERSTANDING THE UK CYCLE TOURISM MARKET

For a clear understanding of the UK cycle tourism market it is necessary to consider:

- a) how the UK cycle tourism market can most usefully be segmented;
- b) what types of cycling tourism activity are of interest to each market segment;
- c) what are the key product requirements of each market segment.

4.1 UK CYCLE TOURIST MARKET SEGMENTS

There are many ways of segmenting the UK cycle tourism market. Research undertaken for the East of England Tourist Board¹ suggests that the most helpful way to segment the market is on the basis of the frequency with which people go leisure cycling. This appears to determine:

- the type of cycling tourism that people are interested in;
- the distances they will cycle;
- the cycling tourism products they require.

The following key cycling tourist market segments can thus be identified:

- a. **Infrequent Leisure Cyclists**
 - people who rarely cycle – they are likely to have cycled as children but have lapsed as cyclists in adulthood;
 - they may not own a bike, but if they do, the likelihood is that they hardly ever use it;
 - this segment would also include people with young children, who are temporarily constrained by the limits of the cycling abilities of their children, or the logistics of taking babies and very young children cycling.

- b. **Occasional Leisure Cyclists**
 - people who cycle for pleasure a few times during the summer;
 - they are unlikely to cycle during the winter;
 - they will usually be bike owners.

- c. **Frequent Leisure Cyclists**
 - people who will go leisure cycling approximately once or twice a fortnight during the summer, and possibly at least once or twice during the winter;
 - they will invariably be bike owners.

- d. **Cycling Enthusiasts**
 - people who go leisure cycling at least once a week, whatever the time of year, although perhaps less frequently during the winter;
 - bike owners, and probably regular utility cyclists.

There is another group, of frequent utility cyclists who cycle for pleasure on an occasional basis.

And there are also those from overseas who may be frequent cyclists at home, but are put off in the UK by adverse traffic conditions.

The distinction between each segment is, of course, very difficult to determine. Where one segment stops and the next starts is impossible to say and people may well move from one segment to the other over time. It is also impossible to quantify the size of each market segment.

It is, however, reasonable to assume that, based on currently available figures for cycle usage, Infrequent Leisure Cyclists will potentially far outnumber any of the other segments at present. Neither does it seem unreasonable to suggest that the potential size of each market segment diminishes as frequency of leisure cycling increases: that there are potentially more Occasional Leisure Cyclists than Frequent Leisure Cyclists, and that Cycling Enthusiasts are likely to comprise the smallest market

segment. There is, however, no conclusive research evidence to confirm this view.

It should also be pointed out that as projects such as the National Cycle Network enable more people to cycle safely, more people will be able to cycle more frequently.

The table opposite provides an assessment of the main interests and product requirements of each cycling tourist market segment, based on currently available research on the UK cycle tourism market.

¹*'England's Cycling Country' Profiling Research, June 1998.*

“There are potentially more Occasional Leisure Cyclists than Frequent Leisure Cyclists, and Cycling Enthusiasts are likely to comprise the smallest market segment.”

4.2 CYCLING TOURIST MARKET SEGMENTS – KEY INTERESTS AND PRODUCT REQUIREMENTS

MARKET SEGMENT	TYPES OF CYCLING TOURISM ACTIVITY INTERESTED IN:	PRODUCT REQUIREMENTS
a. Infrequent Leisure Cyclists	<ul style="list-style-type: none"> • Traffic-free Cycling • Packaged Cycle Touring Holidays 	<ul style="list-style-type: none"> • Traffic-free cycle paths • Cycle Hire • Packaged cycling holidays
b. Occasional Leisure Cyclists	<ul style="list-style-type: none"> • Day Cycle Rides (20-25 miles on quiet country roads and traffic-free paths) • Centre-based Cycling Short Breaks • Access to countryside from town and home 	<ul style="list-style-type: none"> • Circular day cycle routes with maps and information • Traffic-free cycle paths • Safe places to leave the car while cycling • Ideas for cycling short breaks • Cycle friendly accommodation • Cycle parking and storage • Cycle repair/rescue
c. Frequent Leisure Cyclists	<ul style="list-style-type: none"> • Day Cycle Rides (30-35 miles on quiet country roads and traffic-free paths) • Centre-based Cycling Short Breaks • Access to countryside from town and home 	<ul style="list-style-type: none"> • Circular day cycle routes with maps • Safe places to leave the car while cycling • Cycle access by train (for some) • Ideas for cycling short breaks and cycle touring holidays • Cycle friendly accommodation • Cycle parking and storage • Cycle repair/rescue
d. Cycling Enthusiasts	<ul style="list-style-type: none"> • Day Cycle Rides (up to 40-50 miles primarily on quiet country roads) • Independent Cycle Touring Holidays and Short Breaks • Access to countryside from town and home 	<ul style="list-style-type: none"> • Ideas for day cycle rides - Cycling Enthusiasts will tend to plan their own rides, using cycle route leaflets for ideas and information • Cycle access by train (generally more important for Cycling Enthusiasts than for other market segments) • Cycle friendly accommodation • Cycle parking and storage • Cycle repair

5. UK CYCLE TOURISM – THE POTENTIAL FOR GROWTH

5.1 PROSPECTS FOR GROWTH

All indicators suggest continued growth in cycle tourism in the UK.

Key factors behind the anticipated growth of UK cycle tourism include:

- the general growth in demand for active leisure pursuits and activity holidays, as people become more conscious of their health and fitness;
- an increasing interest in 'green' (environmentally sustainable) tourism activities;
- anticipated continued growth in countryside recreation and holidays;
- increasing provision of traffic-free or traffic-managed cycle routes such as those being created by the National Cycle Network;
- increasing and improved provision and promotion of on-road routes for leisure cycling;
- increasing promotion of cycling as a leisure and holiday activity;
- the more fashionable image of cycling as a leisure pursuit and holiday option;
- the publicity surrounding the opening of Phase 1 of the National Cycle Network in June 2000.

The development of safe, convenient and attractive cycle routes is clearly the key to realising the growth potential of cycle tourism in the UK.

Safety is undoubtedly the main concern for cyclists and potential cyclists, and is the major barrier to increasing leisure cycling. Where traffic-free cycle routes have been developed, levels of use have been high.

For example:

Journeys on the Camel Trail in Cornwall rose from 70,000 to 300,000 between 1987 and 1995.

The Bristol & Bath Railway Path now carries an estimated 1.5 million journeys each year.

At peak times, there are more cyclists on the Manifold and Tissington Trails in the Peak National Park, than there are cars on the A54 out of Buxton.

The National Cycle Network clearly has a major contribution to make to the development of such safe cycle routes.

There is evidence of increasing interest throughout the UK in the development of cycle tourism. Many local authorities (particularly rural authorities) are beginning to recognise the potential that cycle tourism offers for their areas. They are investing in the development and promotion of leisure cycling routes and trails and in improving the infrastructure that their areas offer for cycle tourists.

The private sector is also beginning to recognise the potential of cycle tourism: the number of cycle hire and cycling holiday operators is steadily increasing; an increasing number of commercially produced cycle route maps and publications are now available; and many tourism operators are beginning to recognise cycle tourists as a potential new source of business.

UK cycle tourism is likely to remain predominantly rural for the foreseeable future, until such time as the country's urban leisure cycling product is further developed. However in some areas urban cycle tourism may develop fast, particularly where the National Cycle Network creates good quality routes through cities.

“Safety is undoubtedly the main concern for cyclists and potential cyclists, and is the major barrier to increasing leisure cycling. Where traffic-free cycle routes have been developed, levels of use have been high.”

“Journeys on the Camel Trail in Cornwall rose from 70,000 to 300,000 between 1987 and 1995.”

5.2 GROWTH PROSPECTS BY TYPE OF CYCLING TOURIST VISIT

Growth prospects for each type of cycling tourist visit are discussed below:

Cycling Holidays

- a relatively small market overall, but one which appears to have seen steady growth in recent years;
- likely to be continued steady growth in both domestic and overseas cycling holiday markets;
- the strongest growth is likely to be in self-organised, centre-based cycling short breaks;
- growth in cycle touring holidays is likely to be more modest, with stronger demand for circular cycle touring routes than for linear routes (other than 'pilgrimage' routes, or routes between rail stations or ferry ports);
- limited growth is likely in the packaged cycling holiday market;
- unfortunately the car is likely to remain the primary means of access for domestic cycling holiday tourists, especially those on centre-based cycling short breaks. There is, however, potential to encourage a greater proportion of cycling holidaymakers to arrive by train, given improved cycle access by rail, and improved rail services;
- growth in overseas cycle tourism is most likely to come from the Dutch, German, Scandinavian, and French markets in self-organised cycle touring holidays and holiday cycling. There may also be increased demand for packaged cycling holidays from the North American and Australasian markets.

Holiday Cycling

- there is undoubtedly a sizeable potential market for holiday cycling which can be further developed given improved provision and promotion of suitable leisure cycling routes in holiday areas;
- many UK holidaymakers already cycle while on holiday and there is evidence that many more would like to. There is potential to encourage UK holidaymakers to use bikes much more as their primary means of transport during their holiday (if not their means of access in the first place).

For example:

In Germany, where the cycling infrastructure is much more developed, up to 25% of the population cycle while on holiday (compared to 3% in the UK).

The concept of people relinquishing their cars in favour of cycling or walking while on holiday, is already being applied in the UK at Center Parcs holiday villages. Such a concept could potentially be applied in a modified form in other UK holiday resorts.

Cycling Day Visits

- cycling day visits offer by far the greatest growth potential of all types of cycle tourism activity;
- there is thought to be significant latent demand for cycling day visits, which remains, as yet, untapped;
- this is a market which should see significant growth as the provision and promotion of safe (and in particular traffic-free) cycle routes develops.

“Cycling Day Visits offer by far the greatest growth potential of all types of cycling tourism activity.”

6. DEVELOPING THE UK CYCLE TOURISM PRODUCT – KEY PRIORITIES

6.1 KEY PRIORITIES

An analysis of the growth prospects for UK cycle tourism, and the requirements of the main cycling tourist market segments suggest the following as the key priorities for developing and promoting the UK cycle tourism product:

- the development of an infrastructure of safe, convenient, and attractive cycle routes for day/holiday cycling, centre-based cycling short breaks and cycle touring holidays, with an emphasis on traffic-free routes and circular routes;
- safer and easier cycle access into, around and out of towns and cities;
- coherent and visible route signing, without which cyclists will lose the route;
- better quality cycle route maps and information;
- improved arrangements for cycle carriage by public transport and promotion of cycle access by train or bus;
- improved bike hire at stations;
- for those cycle tourists arriving by car, suitably located and secure car parking;
- easy-to-book cycle friendly accommodation;
- the development of a more cyclist-friendly culture within the tourism industry;
- better co-ordinated and targeted marketing of cycle routes, cycle hire and cycling holidays.

6.2 THE ROLE OF THE NATIONAL CYCLE NETWORK

The National Cycle Network has a significant contribution to make to the development of UK Cycle Tourism.

The development of the Network:

- is already helping to raise the profile of cycling and should thus serve to encourage more leisure cycling and cycle tourism, and lessen the dependence on the car which currently dominates UK tourism;
- is providing a major stimulus to the development of new cycle routes and trails throughout the country, and is playing an important role in setting and raising standards for cycle route provision and mapping;
- will improve cycle access into and out of towns and cities, making them more marketable as cycling short break or touring holiday destinations, and increasing the potential for encouraging cycling tourism day visits, and local leisure cycling trips from home by city and town dwellers;
- will provide new opportunities for tourism businesses located along the Network to promote themselves to cycling tourist markets, e.g. attractions will be able to promote access by bike, while accommodation establishments may be able to attract cycle tourists;
- will create new commercial opportunities for the development of cycle hire and cycling holiday businesses, and the development of other businesses, such as refreshment stops, campsites, other forms of tourist accommodation, and other support services, such as luggage transfer or cycle repair/rescue;

- will provide opportunities for sections of the Network to be incorporated into linked circuits and loops for circular day cycle rides and cycle touring holidays;
- will provide opportunities for traffic-free sections (e.g. Bristol & Bath) to be promoted as tourist attractions in their own right;
- will provide opportunities for the development and promotion of cycling holiday packages by linking sections to provide extended circular tours, or by promoting linear routes between rail stations and ferry ports (e.g. Hull to Harwich) for cycle touring holidays;
- will provide opportunities for strategic routes (e.g. C2C) to be promoted as cycle tour 'pilgrimage' or 'challenge' routes for both domestic and overseas holidaymakers;
- will help to overcome the image of Britain's unfriendly cycle culture for overseas visitors.

6.3 GOVERNMENT POLICY

The *White Paper on Integrated Transport Policy (1998)* sets out a package of measures to create a better transport system, which includes supporting the development of the National Cycle Network.

The Government's strategy for tourism, *Tomorrow's Tourism*, was launched by the Department of Culture, Media and Sport in 1999. Section 4.1 outlines plans for "developing and promoting a sustainable approach", including addressing transport issues associated with tourism.

7. USAGE OF EXISTING NATIONAL CYCLE NETWORK ROUTES

7.1 THE NATIONAL CYCLE NETWORK

The Network is currently under development and sections are already open. It is composed of traffic-free sections (normally through urban areas or on the urban fringe), linked with on-road sections, often on minor country roads. It will provide for two quite distinct types of use:-

- LOCAL use by local commuter, utility and leisure cyclists and walkers
- Away from home use by cycle tourists.

The vast majority of users fall into the first category - over 95% of users are local people making local trips, and these include a high proportion of people making local leisure trips.

Cycle tourism will however become an increasing element as more of the Network opens and is publicised.

7.2 ROUTE EXAMPLES

It will be helpful to appreciate that existing sections of the Network vary considerably in their use patterns from place to place. Three examples will serve:-

- The Bristol & Bath Path is a 13-mile traffic-free route passing through urban east Bristol and then through the countryside to Bath. It caters for both walkers and cyclists. It provides a prime commuter route during the week for people cycling and walking into central Bristol; it is also a major school route; and at weekends (even in moderate weather) it is packed with local leisure cyclists from the surrounding areas. Route use is split roughly evenly between utility and leisure use. Very few people travel to the route by car.

Cycle tourism (cycling by people away from their home area, on trips of more than three hours, or long-distance cycle tourists passing through) is not so high, but includes people who travel to the Steam Railway at Bitton or to

Bath and combine this with a cycle ride. The Bath end is served by cycle hire.

The Bristol & Bath Path carries 1.5 million journeys per year.

- The Camel Trail in Cornwall is situated in one of Britain's leading holiday regions to which most visitors travel by car. It has extensive cycle hire and offers a there-and-back day ride on a flat, traffic-free route which is suitable for families including very young children and complete novices. The major use of the Camel Trail is by Holiday Cyclists (people going cycling for a day whilst on holiday), with some use also by local people for leisure rides.

The Camel Trail attracts 300,000 journeys per year.

- The C2C route (featured in the Case Studies, Section 8) is a 140-mile section of the National Cycle Network, of which half is on traffic-free paths. Whilst approximately 10,000 people per year cycle the whole route from coast to coast as cycle tourists, an estimated 250,000 trips per year are made by local people at the eastern end alone on trips to work, to school and for local leisure. This shows that a successful long-distance route can also have a distinctly local use pattern in places, within which the tourist use is a very small proportion of the total use.

7.3 FACTORS AFFECTING ROUTE USE

Usage of a route for leisure and tourism activities will depend on a number of factors:-

- How much of the route is traffic-free. All our experience confirms that local leisure cycling (which attracts a high proportion of novices and less confident cyclists) will be far higher on traffic-free than non-traffic-free routes.
- How well the route passes through or connects with centres of population. Any traffic-free route

which can be easily accessed from home by local people is likely to attract a high level of local leisure cycling.

- Whether the route is in a holiday area or resort. Good quality traffic free routes in holiday areas will attract high levels of use by holiday cyclists.
- Whether the route is largely flat or hilly. Novices and infrequent cyclists will be put off by too many hills (although the hardy will find these a challenge, as they do on the C2C route).
- How well the route links to tourist attractions and places to visit. Day visitors in particular will be attracted to a route which also offers the opportunity to visit a site of interest.
- Whether the route is circular, or can be incorporated into circular routes. Cyclists will not always want to return the same way, and may often seek circular options. To some extent this depends on how the route is marketed and signed.

7.4 TYPES OF CYCLIST USING THE NATIONAL CYCLE NETWORK

Of the four categories of leisure cyclist identified earlier - Infrequent, Occasional, Frequent and Enthusiast - all are catered for in different ways by the National Cycle Network.

Local traffic-free sections in urban areas are ideal for novices. Traffic-free routes in holiday areas, if accompanied by cycle hire, are ideal for family holiday-makers.

Occasional and Frequent cyclists will use longer sections, combining these with sections on minor roads to create circular routes. Traffic-free routes out of urban areas will enable these cyclists to reach the countryside where networks of minor roads are available.

Cycle Enthusiasts are those who are most likely to attempt the sections marketed as long-distance routes.

7.6 USEFUL FIGURES FOR ESTIMATION

- **Day leisure cycling in urban areas**
For good quality traffic-free paths in urban areas, Sustrans uses a rule of thumb estimation of 50,000-100,000 trips per year for every mile of route within the urban area, for routes over 5 miles long. This figure includes both cyclists and walkers, and all journey purposes, and so does not distinguish between tourism, leisure and utility. One way to get a rough estimate of the proportion of leisure trips is to measure the weekend compared to the weekday use.

- **Day-cycling in the countryside**
An estimated 83% of people take leisure day trips of some sort (*UK Leisure Day Visits Survey 1996*). The average person visits the countryside over 3 times a year. Of these trips, 3% are thought to have cycling as the main activity (this includes those who drive there to cycle and those who cycle there - figures are not available for each independently).

- **Tourist cycle day-trips in urban areas**
Very little information is currently available. Tourist use of urban routes is low at present.

- **Tourist day-cycling in holiday areas**
This will often involve bike hire. Routes such as the Camel Trail, the Tarka Trail and the Tissington Trail have been established over a period of years. The Camel Trail attracts 300,000 visitors per year, of which almost all are holiday cyclists hiring bikes.

Other useful figures are:

- 3% of domestic holidaymakers participate in cycling whilst on holiday (*UK Tourism Survey 1997*).
- 3% of overseas visitors participate in cycling whilst on holiday in the UK (*Overseas Leisure Visitors Survey 1996*).

- **Cycling Holidays - short break and long distance**

- 1% of domestic holidays have cycling as their main purpose (*UK Tourism Survey 1997*).
- Similarly, 1% of overseas visitors to the UK say that cycling is important in the decision to visit (*Overseas Leisure Visitor Survey 1996*).

These figures would be expected to increase with the opening of the National Cycle Network and the general interest in cycling and fitness.

7.7 ESTIMATING USE LEVELS

The figures provided above may be useful to route developers in forecasting use levels, and in determining how best to market routes. Combined with information on spending by cyclists (see Section 3.2, Page 4), they may also be useful in forecasting income generated by a route. For routes in holiday areas, figures for the holiday population at least at county level may be obtainable from the Tourist Boards (see Contacts for further information).

For routes through urban areas, local population statistics may be useful, or the Sustrans "rule of thumb" on mileage. However there is huge variability between routes in terms of use levels which relates to other factors entirely, such as terrain (hilliness), attractiveness of routes, quality of surface, temperature, how the route is marketed and how long the route has existed. Great care should be taken in making estimates of use levels.

7.8 ROUTE MONITORING PROJECT

In 1998 Sustrans established a route monitoring project for the Network, which combines data from questionnaires with manual and automatic counts. For further information contact Diana Richardson on 0117 926 8893.

"Of the four categories of leisure cyclist identified earlier - Infrequent, Occasional, Frequent and Enthusiast - all are catered for in different ways by the National Cycle Network."

"All our experience confirms that local leisure cycling (which attracts a high proportion of novices and less confident cyclists) will be far higher on traffic-free than non-traffic-free routes."

8. CYCLE TOURISM IN EUROPE

8.1 BACKGROUND

Cycle tourism is developing rapidly in much of Europe, National Cycle Networks have opened or are being developed in Denmark, Switzerland, Finland, Germany, the Netherlands and elsewhere, and flagship routes already have impressively high levels of use.

The market for European cycle tourism is now forecast to reach £14 billion within 20 years. One critical development will be the EuroVelo scheme to create a network of routes reaching into all the European Union countries.

8.2 EXAMPLES

- Denmark opened 2,000km of national cycle route in 1997, and now attracts tourists from Germany and elsewhere. Cycling accounts for 18% of all journeys in Denmark.
- In Germany there are nearly two hundred long-distance cycle routes and cycling is the fastest-growing leisure pursuit. One in four Germans cycle whilst on holiday. In Münsterland, on the One Hundred Castles Route, cycle hire has increased tenfold in the decade to 1990, from 431 to 4,200 cycles available for hire.
- In Austria, the Danube Cycle Route runs for 250km from Passau on the German border to Vienna, largely traffic-free and largely downhill. This spectacular route attracts over 1.5 million cyclists every year, and in typical towns on route the majority of overnight visitors are cyclists.
- France has succeeded in attracting cycle tourists to its quiet lanes network. The Bourgogne area alone receives well over half a million cycling visitors per annum.
- Spain has seen the growth in use of "pilgrimage" routes, such as El Camino de Santiago in the North, and the Vias Verdes (Greenways).
- Holland has developed a network of national routes making use of its existing high-quality local cycle

routes, and many other countries are now also developing cycle tourism.

8.3 THE EUROPEAN CYCLE TOURISM MARKET

Cycling Holidays - where cycling is the main pursuit and the main form of travel - now account for 2-4% of total holiday trips in some European countries, and this is predicted to double or treble within the next decade to 6-12% of all European holidays. This is the dedicated cycling market, on short breaks or longer cycling holidays.

An even larger market is Holiday Cycling, cycling as an extra pursuit whilst on holiday. This is estimated to be twice the size of the dedicated cycling market. Ireland estimates that already 7% of visitors cycle whilst on holiday. The German figure quoted above is nearly 25%.

Where public authorities and private sector suppliers establish an attractive cycle tourism offering, this can generate substantial demand within a very short space of time. This suggests that those parts of Europe which successfully offer cycling as an additional holiday option will be able to attract a substantial market.

8.4 CRITICAL SUCCESS FACTORS

- Secure traffic-free routes, or networks of very quiet rural lanes
- Signage for the routes, and publicity material such as mapping
- Accommodation - a genuine welcome, and facilities for cyclists
- Collective promotional activity stressing the benefits and quality of provision.

The European experience, like that in Britain, also demonstrates that whilst cycle tourism is normally understood to refer to the dedicated cyclist and

the holiday cyclists, in fact same-day visitors, especially on sections near to major cities, will be the largest numerical market segment.

8.5 THE EUROPEAN CYCLE TOURIST

Dedicated cycle tourists are likely to be aged 40 - 55, travelling as a couple or in small groups, staying on average 3-4 nights. The second-largest age range for the dedicated cyclists is 20-29. For both age groups, most will arrange their travel and accommodation themselves, and do not book in advance. A small minority will be interested in the inclusive cycle touring package. Cycle tourists spend as much as (and some studies indicate more than) other kinds of tourist.

The same-day cyclist visitor market is far more wide-ranging, including more families and groups of young people. Cycle routes which encourage a high proportion of same-day visits will tend to attract a higher proportion of children as users.

Motivations for cycle tourism across all groups are healthy living, relaxation and an attractive countryside.

8.6 IMPLICATIONS FOR THE UK

The growth of cycle tourism is evident right across Europe. Some countries, such as Germany, Denmark and Holland, already have large and growing numbers of people interested in cycle tourism, who can be attracted to the UK by the unique features of our landscape, culture and heritage. Holiday cyclists - those who may be attracted by the option of cycling - are a particularly large market. They may choose to visit areas of the UK where cycling is safe and convenient and can be integrated into their holiday.

Information on cycling in Europe has been extracted from: The Market for Cycle Tourism, by Les Lumsdon of Staffordshire University UK, published by EuroVelo, the European Cycle Route Network.

The C2C (Sea to Sea) Cycle Route is a 140-mile cycle route on minor roads and traffic-free cycle paths running across Cumbria and Northumbria, from the Irish Sea in the west (starting at Whitehaven or Workington), to the North Sea in the east (finishing in Sunderland or Tynemouth).

The route opened in 1995 and was the first long-distance recreational route to be designated as part of the National Cycle Network. It enjoys a very high profile as one of the key sections of the Network and as a flagship recreational route.

In 1995, the route won an award in the British Airways Tourism for Tomorrow global competition, receiving good television coverage as a result, including a feature on the 'Wish You Were Here?' holiday programme. It has since gone on to be recognised with awards from the Royal Town Planning Institute and from Durham County Council. In 1998 the route won the American Society of Travel Agents Smithsonian Environmental Award, one of the most prestigious awards in the travel and tourism industry.

Usage of the C2C route was monitored in 1996 and 1997 through the use of counter units and field interviews with route users. The key findings of the 1997 monitoring exercise are summarised as follows:

- 73% of users of the C2C route are male.
- Users of the route are mainly aged between 26 and 55 (70% of users).
- Users of the route come from all over the UK. The North East region accounts for the most significant proportion of users (40%).
- Most cyclists take between 3 and 5 days to cycle the C2C.
- The majority of users staying overnight along the route use bed and breakfast accommodation (63%). The next most used types of accommodation are youth

hostels (16%) and camp sites / camping barns (11%). A small proportion of users (7%) use hotel accommodation.

- The majority of users cycling the whole length of the route appear to be using the C2C for a short break holiday. Only 16% are using it as a subsection of a longer holiday in the region.
- The majority of users (58%) do not make use of any form of support during their use of the C2C. 25% make use of support from friends or relatives. 17% make use of the agency support services operating along the route. This figure was more than double the proportion of users making use of agency support services in 1996.
- 60% of users arrived at their start point by car. 29% arrived by train or bus. 2% arrived by bike.
- 37% of users indicated that they would be in favour of using a circular route as opposed to a linear route. However many people said that they preferred the linear route as it adequately fulfilled the objective of cycling from coast to coast.

In terms of user expenditure along the C2C, the results of the route monitoring exercise produced the following information:

- The average daily expenditure per route user was estimated at £30.
- Spending on accommodation and in cafes, pubs and restaurants accounted for the majority (76%) of users' total expenditure, with spending on accommodation and food and drink in roughly equal proportions.
- Users typically spent between £5 and £40 on accommodation, with the majority (57%) spending between £10 and £20.
- Spending in newsagents, foodshops and supermarkets accounted for roughly 9% of total expenditure.

- Very little expenditure was incurred at attractions along the route. 76% of users indicated spending nothing at all at attractions.
- Spending on cycling equipment and cycle hire accounted for approximately 13% of the total.

On the basis of the 1997 route monitoring information it is estimated that between 10,000 and 11,000 people cycled the whole of the C2C route during 1997. This represents a decline from the 1996 estimates of between 12,000 and 15,000 users. The poorer weather and reduced media exposure are likely to be the key factors contributing to this decline.

Taking account of these estimated user numbers and the expenditure information from the route monitoring research, the total spend by users of the C2C in 1997 is estimated at £1.1million.

In terms of the development of linkages to the C2C, the Reivers Way was opened in 1998, informally providing the return C2C route that users have been keen to see. The Reivers Way returns cyclists to Cumbria via Tyneside, Kielder and Carlisle. With this link complete, the C2C not only has a return leg, but also a link to Carlisle, and to the Carlisle to Glasgow National Cycle Network route. Future links from Keswick to Kendal and into Lancashire, and from Penrith across the Pennines to York, will further enable cyclists to use the C2C as a subsection of a longer cycle touring route.

Source: Visitor Monitoring of the C2C Cycle Route 1997, A.M. Cope & D. Doxford, University of Sunderland School of Environment, January 1998

For further information contact: *David Gray, Sustrans, Rockwood House, Barn Hill, Stanley, County Durham DH9 8AN*

CYCLE TOURISM CASE STUDY 2

THE CELTIC TRAIL



9.2

The Celtic Trail will be a 186-mile cycle route across south Wales, from Newport in the east to Kidwelly in the west, taking in Caerphilly, Pontypridd, Bridgend, Port Talbot, Neath, Swansea, and Llanelli. It will link with the Wales National Cycle Route (Lôn Las Cymru) via the Taff Trail, providing a link down to Cardiff, and up to the Brecon Beacons. The Trail will form part of Route 4 of the National Cycle Network, and Route 1 of the EuroVelo Atlantic Coast Route from southern Portugal through to the west coast of Ireland.

The route network will provide links to all of the major population centres in South Wales, and safe cycle access to over 100 visitor attractions, including 31 of Wales' 50 most popular attractions. The Trail will also provide a link between all the flagship attraction projects that are currently being developed in South Wales, including:

- the Monmouth and Brecon Canal development scheme at Newport;
- the Millennium Coastal Park at Llanelli;
- the National Botanic Gardens of Wales, near Carmarthen;
- the Wales Millennium Centre and Snowdome at Cardiff.

70% of the Celtic Trail will be on traffic-free cycle routes, with the remainder being on minor roads with traffic-calmed junctions and crossings. The trail will also include a High Level Route on forest tracks through Morgannwg Forest.

The Trail will include 12 modal interchanges, involving integration between the Trail and road and rail access. It is envisaged that these interchanges could also provide cycle hire and maintenance facilities, as well as information services.

The first sections of the Celtic Trail will open in 1999, with the entire route due for completion in 2000. The Trail is being developed by the South Wales Cycleway Consortium, a partnership between the South Wales local authorities, Sustrans, Groundwork

Cymru Wales and various Welsh Government and quasi-governmental bodies.

The total cost of developing the Celtic Trail will be £11 million. Funding is coming from the National Cycle Network's Millennium Commission grant, the European Regional Development Fund (ERDF) under the Industrial South Wales Objective 2 Programme, Welsh Capital Challenge, and the local authorities of South Wales.

It is anticipated that the Celtic Trail will attract significant numbers of cycle tourists. Estimates prepared as part of the marketing strategy for the Trail project that some 200,000 cycle tourists will be using the Trail each year by 2005. The majority (93%) are expected to come from within the UK. 14,000 (7%) are projected to come from overseas. Spending by cycle tourists using the Trail is projected to total between £14.5 and £18.5 million per annum by 2005, creating up to 1,000 new jobs in the tourism sector. It is envisaged that the 1.7 million residents of the industrial South Wales area will also provide a sizeable day visitor market for the Trail.

The development of the Trail will be supported by a full marketing programme. A marketing strategy for the Trail was produced in 1998, and a Marketing Executive and Product Development Executive have been appointed to implement its recommendations.

An application for ERDF assistance to support the implementation of the marketing strategy has also been lodged.

The main target domestic tourist markets for the Trail are identified as London and the South East, the West Midlands, and the Bristol / Bath / Gloucester area, all of which have excellent rail links to the eastern end of the route at Newport, as well as good motorway links.

The key target overseas visitor markets are identified as Germany, the Netherlands, France, Scandinavia and

the United States. These are also the Wales Tourist Board's primary target overseas markets.

The Celtic Trail marketing campaign will involve a wide range of promotional activities, including:

- launch events;
- high quality mapping and route information;
- the establishment of a telephone information helpline for the Trail;
- the creation of a Celtic Trail web site, linking with other relevant web sites;
- joint marketing with the Wales Tourist Board, Tourism South and West Wales, Sustrans, other visitor attractions and other relevant partners;
- advertising in appropriate holiday guides and cycling publications;
- press and media work;
- attendance at cycling and holiday exhibitions.

A critical element of the promotional campaign will be to have the right product image and branding for the Trail. Following careful research and consideration, a Celtic Cross logo has been developed. This complements the Celtic Trail name and fits well with the Wales Tourist Board's current branding for Wales.

Source: A Marketing Strategy for the Celtic Trail, TRACS Research and Consultancy Services, Swansea Institute of Higher Education, April 1998

Contact for further information:

David Morgan, Celtic Trail Marketing Executive, Tourism South & West Wales, Charter House, Enterprise Park, Swansea SA7 9DB

“Spending by Trail users is projected to total up to £18.5 million p.a.”

CYCLE TOURISM CASE STUDIES 3

9.3 STAFFORDSHIRE MOORLANDS "CYCLE & SEE"

The Staffordshire Moorlands District lies on the southern edge of the Peak District National Park. In the late 1980s, the District Council decided to target the activity holiday market, as an appropriate tourist market to attract to a rural area on the edge of a National Park. Initiatives were introduced to improve the infrastructure for walking, cycling, horse riding and other outdoor pursuits. One of these initiatives was the Cycle & See project.

Cycle & See involved the promotion of five researched cycle routes through an information pack comprising:

- a route card for each route;
- a safety code;
- an information sheet;
- discount vouchers for attractions, refreshment stops and accommodation establishments.

The packs were sold through Tourist Information Centres, and supported by a promotional campaign. The primary target market was the casual cyclist for both short breaks and day visits. Routes were not waymarked in any way.

"Cycle & See Welcome" stickers were issued to the traders involved in the discount voucher scheme. This proved to be a good incentive for encouraging sales of the packs. Sales reached around 1,000 packs per annum by 1993, but began to decline after 1994.

Following a survey of users in 1995, traffic-free mileage was increased, routes were shortened, and difficult road sections were withdrawn.

The campaign was relaunched in 1996 with a new format pack. The covers of the route leaflets were re-designed to give information on the amount of traffic-free mileage, the distance and the grade of the route from easy to strenuous. The voucher scheme was discontinued. The Cycle & See name was retained but the logo and graphics enhanced to convey

relaxation in the countryside as the core value of the Cycle & See brand.

A second survey of users was undertaken in 1997:

- The majority of users (59%) were day visitors from the surrounding areas. 24% were on short breaks in the area and 17% were on longer holidays. This mix of users largely reflects the overall mix of visitors to the Peak District.
- Most users came from within a 100 mile radius.
- 60% were aged between 35 and 54. Only 3% were under 25. 17% were in the 55-64 age group, suggesting that casual cycling can appeal to older age groups if the conditions are right.
- Most users cycled as a couple or in a small group of friends. A significant minority cycled as a family.
- In terms of their socio-economic profile, users fell largely into the A, B and C1 socio-economic groups.

The key conclusions from the Cycle & See initiative interims of the development of cycle routes for the casual cyclist market are as follows:

- The ideal cycle route is one which is traffic-free, or at the very least uses quiet roads where traffic levels are very low.
- Gentle gradients are preferred, although some hills will be tolerated.
- Suitable places to stop, especially pubs and cafes, and good scenery are key requirements.

"The Cycle & See initiative was introduced with little or no need for capital investment. It utilised infrastructure which already existed and the marketing campaign involved minimal expenditure."

The Cycle & See initiative was introduced with little or no need for capital investment. It utilised infrastructure which already existed, and the marketing campaign involved minimal expenditure (approximately £3,000 per annum).

One of the most important aspects of the Cycle & See campaign has been the adherence to monitoring, especially the evaluation of the levels of pack sales and visitor satisfaction.

The District Council has thus been able to use the information gathered as a basis for decision making for future development, and has been able to gradually shape and develop the project to meet the needs of target user groups.

Source: Cycle & See: Developing a Cycling Package for Visitors, Paul Downward and Les Lumsdon, Staffordshire University Business School, July 1998 English Tourist Board Insights

Contact for further information:
*Angie Guest, Tourism Officer,
Staffordshire Moorlands District
Council, 1 Market Place, Leek,
Staffordshire ST13 5HH*

"The value in terms of spending in the local economy by pack users is estimated to be in the region of £400,000 per annum."

CYCLE TOURISM CASE STUDY 4

9.4

ENGLAND'S CYCLING COUNTRY INITIATIVE

The England's Cycling Country Initiative was established by the East of England Tourist Board in 1996 to provide a strategic approach to developing the identified potential of cycle tourism across the East of England Region (covering the counties of Norfolk, Suffolk, Cambridgeshire, Lincolnshire, Essex, Bedfordshire and Hertfordshire).

The first step was the preparation of the England's Cycling Country Strategy, following an initial phase of research and consultations. The Strategy was published in October 1996, setting out a vision to establish the East of England as the premier UK destination for cycling tourism within the next 10 years.

Key issues identified for this vision to be achieved were the need for:

- the development of safe and convenient circular cycle routes on quiet country lanes and traffic-free cycle paths;
- more effective and co-ordinated promotion of existing cycling opportunities;
- greater consistency of product quality in terms of cycle routes and cycle hire provision;
- heightened awareness within the Region's tourism industry of the opportunities for cycling tourism, including the development of the National Cycle Network;
- further development of the Region's cycling short breaks and holidays product;
- more information on cycling tourism markets, especially the markets for cycling holidays and short breaks;
- improved access for cyclists by public transport;
- safer and easier access into and out of urban areas.

Based on the Strategy recommendations, the England's Cycling Country Initiative was launched in March 1997 at a major regional conference on cycle tourism organised by the Tourist Board.

Three major areas of work were progressed during 1997 and 1998:

- the establishment of an initial England's Cycling Country Marketing Campaign;
- the implementation of a research programme to evaluate the Marketing Campaign and to begin building a profile of campaign respondents;
- research to develop and test a new type of cycle route map product to meet the needs of the Occasional Leisure Cyclist.

The initial England's Cycling Country Marketing Campaign was conducted on a relatively low-key basis, as the Tourist Board was concerned to limit the scope of its marketing activity until such time as the Region's cycling tourism product is better developed.

The main focus of the Campaign was the production of a brochure, bringing information on all existing leisure cycling routes and cycling holiday opportunities in the Region into one comprehensive piece of print. The brochure included a reader reply service so that people could request cycling information packs for one of three sub-regional areas of the Region, as well as information on the newly opened Hull-Harwich cycle route (National Cycle Network Route 1).

The brochure was supported by a limited advertising campaign, a direct mail campaign to potentially interested people on the Tourist Board's consumer databases; attendance at the Dutch OpPad and Fietsvakantie exhibitions; and a PR campaign.

Research was conducted in 1997 and 1998, to evaluate the success of the Marketing Campaign and to provide a clearer understanding of types of people responding. The key findings were as follows:

- respondents to the Campaign were all essentially cyclists who regularly go leisure cycling. They ranged from Occasional Leisure Cyclists (going leisure cycling approximately once a month during the summer), to Cycling Enthusiasts (cycling for pleasure at least once or twice a week, and throughout the winter as well as the summer);
- the strongest interest by far was for circular day cycle routes;
- there was a high degree of usage of published cycle route maps / leaflets across all types of cyclist;
- interest in cycling short breaks was good, with a clear preference for independent holidays. Respondents showed very little interest in using a cycling holiday operator;
- there was less interest in longer cycle touring holidays. Those that were more interested in this type of cycling tended to be Cycling Enthusiasts and more experienced cyclists;
- the majority of respondents indicated that they would arrive by car, although a significant proportion of Cycling Enthusiasts said they would prefer to arrive by train;
- there would appear to be a strong link between walking and cycling: a significant proportion of respondents were also interested in walking as a leisure and holiday activity;

- for the majority of respondents, the main appeal of cycling is as a relaxing and enjoyable way to see the countryside;
- there is a clear need to continue to provide information on cycle routes to give cyclists ideas on where to go cycling, and information to help them plan their cycle rides;
- a separate approach is needed to market independent cycle touring holidays, and day cycling and centre-based cycling short breaks.

The development of a new type of cycle route map for the occasional leisure cyclist involved an initial phase of qualitative research (using focus groups) to provide a blueprint of what this type of cyclist requires. The findings suggested a cycle route map which:

- is OS map based;
- folds to A5 (to fit into map cases);
- is waterproof;
- includes simple route directions adjacent to the route map;
- includes brief details of places to visit (with telephone numbers), and snippets of local history and interest;
- includes a list of refreshment stops, with telephone numbers;
- includes essential information about the route e.g. length, riding surface, description of terrain, where to park the car.

Using this information, the Board developed a prototype Cycling Discovery Map for testing by a team of Occasional Leisure Cyclists.

The prototype tested very positively. All of the cyclists involved in the test felt that the Cycling Discovery Map compared very favourably with other cycle route leaflets that are currently available. All saw benefits in Cycling Discovery Maps being consistently available throughout the region. They saw the Cycling Discovery Map as a product that they could have confidence in and that they would be happy to purchase and use.

The Cycling Discovery Map project will now form the main focus of the England's Cycling Country Initiative during the next two years. The Tourist Board is intending to persuade local authorities across the region to adopt the Cycling Discovery Map format for cycle routes in their area. The initial target is to have 20 Cycling Discovery Maps in place by June 2000, ready for a major launch event (for which the Board has recently secured funding from the Millennium Festival Fund) to coincide with Sustrans' Ride the Net event to open the National Cycle Network.

Once good coverage of the region with Cycling Discovery Maps is achieved, the Board will begin to focus the England's Cycling Country Marketing Campaign exclusively on Cycling Discovery Maps. In time, the Board is also planning to use clusters of Cycling Discovery Maps to promote centre-based cycling short breaks.

A Cyclists Welcome Scheme is also being developed to support the implementation of the Cycling Discovery Map project.

Source: Cycling into the Millennium – An Action Plan to promote the East of England as 'England's Cycling Country', East of England Tourist Board, Dec 1998

Contact for further information: Trevor Hayward, Marketing Manager, East of England Tourist Board, Toppesfield Hall, Hadleigh, Suffolk IP7 5DN.

“Interest in cycling short breaks was good, with a clear preference for independent holidays. Respondents showed very little interest in using a cycling holiday operator.”

“The strongest interest by far was for circular day cycle routes.”

10. USEFUL ARTICLES, REPORTS AND PUBLICATIONS

10.1 CYCLE TOURISM ARTICLES AND REPORTS

Cycle Tourism in Britain

Les Lumsdon, Staffordshire University
English Tourist Board Insights
Ref: Vol 7/ D27 March 1996
Future for cycle tourism in Britain.
Available from: ETB Insights Office
Tel: 0181 563 3361/2

Cycling Opportunities: Making the Most of the National Cycle Network

Les Lumsdon, September 1996
Report on UK cycle tourism and the National Cycle Network
Available from: Sustrans Information Service
Tel: 0117 929 0888
£30 + £3 p&p

The Market for Cycle Tourism - EuroVelo: The European Cycle Route Network

Les Lumsdon, Staffordshire University
Available from: EuroVelo, Rue de Londres 15 (boite 4), 1040 Brussels, Belgium
ISBN 2-930288-00-0

On Yer Bike - Cycling and Tourism

Steve Beioley, The Tourism Company
English Tourist Board Insights Ref: Vol 7/ B17 September 1995
Market profile for UK cycle tourism.
Available from: ETB Insights Office
Tel: 0181 563 3361/2

The Market for Recreational Cycling in the Countryside

Countryside Commission, March 1995
Study of the potential market for recreational cycling in the countryside
Available from: Recreation and Access Branch, Countryside Agency
Tel: 01242 521381

Cycle Tourism

Peter Saabye Simonsen, Birgitte Jorgensen, Derek Robbins, Research Centre of Bornholm December 1998
A study of cycling tourism on the Danish island of Bornholm.
Available from the Research Centre of Bornholm
Tel: 0045 56 44 11 44
Email: rcb@rcb.dk

10.2 NETWORK NEWS ARTICLES

The following articles on cycle tourism have been published in Network News, the magazine for partners in the National Cycle Network.

Outlook is bright for cycle tourism, Issue 2, Pages 8-9
How to woo the pedalling holidaymaker, Issue 7, Page 7
Towards sustainable transport for tourism, Issue 9, Page 14

Available from: Sustrans Information Service
Tel: 0117 929 0888

10.3 CYCLE ROUTE USAGE REPORTS

Visitor Monitoring of the C2C Cycle Route 1997

A.M. Cope/ D. Doxford, University of Sunderland, January 1998
Analysis of results from the visitor monitoring project carried out on the C2C route during summer and autumn 1997.
Available from: Andy Cope, University of Sunderland
Tel: 0191 515 3700

European Cycle Routes

Jens Erik Larsen and Philip Insall
Sustrans, September 1997
Report on national and international cycle route developments in Europe.
Available from: Sustrans Information Service
Tel: 0117 929 0888
£10+ £1.50 p&p

10.4 GOVERNMENT POLICY

Tomorrow's Tourism, 1999.

Strategy for tourism
Published by: Department of Culture, Media and Sport, 2-4 Cockspur Street, London SW1Y 5DH

A new deal for Transport: Better for everyone, 1998.

White Paper on the future of Transport produced for the Department of the Environment, Transport and the Regions.
Available from: The Publications Centre, P.O. Box 276, London SW8 5DT. Tel: 0171 873 9090
£16.50

10.5 CYCLE TOURISM MARKETING STRATEGIES

England's Cycling Country Strategy

East of England Tourist Board, October 1996
Cycling tourism strategy for the East of England
Available from: Marketing Department, East of England Tourist Board
Tel: 01473 822922

Cycling into the Millennium

East of England Tourist Board, December 1998
Action Plan to promote the East of England as 'England's Cycling Country'.
Available from: Marketing Department, East of England Tourist Board
Tel: 01473 822922

Marketing Strategy for The Celtic Trail

TRACS Research and Consultancy Services, April 1998
Marketing strategy prepared for The Celtic Trail in South Wales.
Available from: Celtic Trail Marketing Office
Tel: 01792 781212

10.6 GUIDES ON PRODUCING CYCLE ROUTE LEAFLETS

Step by Step

Scottish Tourist Board, 1997
Illustrated manual for producing a local cycling leaflet written by the Cyclists' Touring Club and Sustrans.
Available from: Sustrans Information Service
Tel: 0117 929 0888
£10 + £1.50 p&p

Sustrans' Guidelines for Design of Leaflets for Cyclists

Sustrans, December 1997
Guidelines for producing leaflets for local cycle routes.
Available from: Sustrans Information Service
Tel: 0117 929 0888
Free

11. USEFUL CONTACTS

CYCLE TOURISM CONSULTANTS

The following consultants are known to have had experience of cycling tourism consultancy projects. Inclusion on the list does not indicate Sustrans' endorsement of any consultants, however.

Andrew Keeling ACK Tourism Development Services, Greetwell Place, 2 Limekiln Way, Lincoln LN2 4US
Tel: 01522 536003

Les Lumsdon 72 Fence Avenue, Macclesfield, Cheshire SK10 1LT
Tel/Fax: 01625 616680
Email: leslumsdon@compuserve.com

Andy Cope University of Sunderland, School of the Environment, Benedict Building, St George's Way, Sunderland SR2 7BW
Tel: 0191 515 3700

Tim Bull TRACS Consultancy Services, Faculty of Leisure, Tourism and Transport, Swansea Institute of Higher Education, Swansea SA1 6ED
Tel: 01792 481211

Bernard Lane The Rural Tourism Unit, University of Bristol, Bristol BS8 1HH
Tel: 0117 954 6073

Steve Beioley The Tourism Company, 200 Blackfriars Foundry, 156 Blackfriars Road, London SE1 8EN
Tel: 0171 721 7180

Colin Speakman Transport for Leisure, 67 Grove Road, Ilkley, West Yorkshire LS29 9PQ
Tel: 01943 607868

Johanna Cleary/Tim Hughes Cleary Hughes Associates, 22 The Copse, Hucknall, Nottingham NG15 7RS
Tel: 0115 964 1869

Rupert Douglas & Associates, Hill Top Barn, Laithe, Penrith CA11 0AW
Tel/Fax: 017684 84632
Email: rupertdouglas@fsbdial.co.uk

TOURIST BOARDS

British Tourist Authority, Thames Tower, Black's Road, Hammersmith, London W6 9EL
Tel: 0181 846 9000
Contact: **Liz Beaton**

Scottish Tourist Board, Thistle House, Beechwood Park North, Inverness IV2 3ED
Tel: 01463 716996
Contact: **Lynda Johnston**

Northern Ireland Tourist Board, St Anne's Court, 59 North Street, Belfast BT1 1NB
Tel: 01232 231221
Contact: **Gillian Little, Product Marketing Executive Cycling**
www.ni-tourism.com

Wales Tourism Council, Brunel House, 2 Fitzalan Road, Cardiff CF2 1UF
Tel: 01222 499909
Contact: **David Ward**

English Tourism Council, Thames Tower, Black's Road, Hammersmith, London W6 9EL
Tel: 0181 846 9000
Contact: **Mike Kennedy**

Northumbria Tourist Board, Aykley Head, Durham DN1 5UX
Tel: 0191 375 3000
Contact: **Michael Hepburn**

North West Tourist Board, Swan House, Swan Meadow Road, Wigan Pier, Wigan WN3 5BB
Tel: 01942 821222
Contact: **David Crease**

Cumbria Tourist Board, Ashleigh, Holly Road, Windermere, Cumbria LA23 2AQ
Tel: 01539 444444
Contact: **David Calway**

Yorkshire Tourist Board, 312 Tadcaster Road, York YO2 2HF
Tel: 01904 707961
Contact: **David Andrews**

This pack has been written by Andrew Keeling, Sustrans' Tourism Advisor, in partnership with Sustrans. It will be updated as new research becomes available. Users are advised to check they have the latest edition. This edition, August 1999.

Heart of England Tourist Board, Woodside, Larkhill Road, Worcester WR5 2EF
Tel: 01905 763436
Contact: **Nigel Russell**

East of England Tourist Board, Toppesfield Hall, Hadleigh, Suffolk IP7 5DN
Tel: 01473 822922
Contact: **Trevor Hayward**

London Tourist Board, 26 Grosvenor Gardens, London SW1W 0DU
Tel: 0171 932 2000
Contact: **Robert Chenery**

South East England Tourist Board, The Old Brew House, Warwick Park, Tunbridge Wells, Kent TN2 5TU
Tel: 01892 540766
Contact: **Mark Dowling**

Southern Tourist Board, 40 Chamberlayne Road, Eastleigh, Hampshire SO5 5JH
Tel: 01703 620006
Contact: **Peter Colling**

West Country Tourist Board, 60 St David's Hill, Exeter, Devon EX4 4SY
Tel: 01392 276351
Contact: **Delwyn Matthews**

OTHER ORGANISATIONS

CTC (Cyclists' Touring Club), 69 Meadrow, Godalming, Surrey GU7 3HS
Tel: 01483 417217
Contact: **Stuart Reid, Planning & Policy Officer**

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