Latest trends and data on cycling tourism
Round-Table

6 March 2024
ITB Berlin
Latest trends and data on cycling tourism

Our speakers:

- **Christian Tänzler**
  Allgemeiner Deutscher Farrhad Club-ADFC (Germany)

- **Heiko Riekenberg**
  Bikemap / CycleSummit

- **Russell Walters**
  Adventure Travel Trade Association-ATTA

- **Agathe Daudibon**
  ECF

Moderator: Jessica Casagrande, ECF
ADFC-Radreiseanalyse 2024
ADFC Bicycle Travel Analysis - for the 2023 cycling year
A broader view on cycling tourism

Cycling trips | 3 nights +
Main motive of the holiday: cycling

Cycling trips | 1-2 nights
Main motive of the holiday: cycling

No cycling trip
No cycling trip in 2023/ the last three years

Cycling on holiday
Other activities as main motive, but regular use of bicycles during the trip

Day Trips
Day trips by bike
Not during the holidays
Increasing number of day trips

- 455 million day trips
- 36.4 million day trippers
- 12.5 trips per person and year

- On average 44 km covered
- Spends of 32 € per person and day (excl. travel costs)
New data: cycling on holiday

- 29 million people in the last 3 years
- 10.6 million people in 2023
- Average of 9.8 overnight stays

- Bicycle was used on 6 days on average during the holiday
- Spendings of 123 € per person/day (incl. travel costs per day)
New data: short trips by bike

- 7 million short trips in 2023
- 5 million people in 2023
- Average of 1.8 overnight stays

- Distance covered: 61.8 km/day
- Spendings of 130 € per person/day (incl. travel costs per day)

© ADFC/april agentur
Less cycling trips in 2023 with 3 nights +

- 5.5 million cycling trips in 2023
- 3.6 million people in 2023
- Average of 7.6 overnight stays

- Distance covered: 64.7 km/day
- Spendings of 117 € per person/day (incl. travel costs per day)
37.7 million: more than half of Germany’s adult population cycled during their holidays or day trips in 2023.
ADFC Cycling Tourism Team

Christian Tänzler  
Board Member - Tourism

Till Palme  
Head of tourism department  
| ADFC head office

Annemarie Zirkel  
Project manager tourism | ADFC head office

Michael Maier  
Tourism officer | ADFC head office

Konstanze Meyer  
Tourism officer | ADFC head office

Get in touch: tourismus@adfc.de
Latest trends and data on cycling tourism

Our speakers:

Christian Tänzler
Allgemeiner Deutscher Farrhad Club-ADFC (Germany)

Heiko Riekenberg
Bikemap / CycleSummit

Russell Walters
Adventure Travel Trade Association-ATTA

Agathe Daudibon
ECF

Moderator: Jessica Casagrande, ECF
• Annual Event connecting 120 cycle tour operators from 30 countries worldwide
• Established 2009
• 4 days for networking and incoming / outgoing business
According to our data (source: cycle tour operators)
1. Youth
2. Low budget
3. Domestic & sustainable bike holidays
4. Gravel Biking
Latest trends and data on cycling tourism

Our speakers:

Christian Tänzler
Allgemeiner Deutscher Farrhad Club-ADFC (Germany)

Heiko Riekenberg
Bikemap / CycleSummit

Russell Walters
Adventure Travel Trade Association-ATTA

Agathe Daudibon
ECF

Moderator: Jessica Casagrande, ECF
Centralising available data in one place

1st pillar: Usage from bicycle counters

2nd pillar: EuroVelo developments from national GIS data

3rd pillar: Digital statistics from EuroVelo channels

4th pillar (tomorrow): Cycling Tour Operators survey
ECF gratefully acknowledges financial support from the LIFE Programme of the European Union.

EuroVelo Data Hub

NEW REPORT:

“increased usage of EuroVelo be it for leisure, tourism or mobility purposes”

EuroVelo Usage Monitoring Report (2023)

KEY FIGURES ON EUROVELO USAGE
1 January to 31 December 2023

Compared to 2019

+9.8% FULL WEEK

+11.3% WEEKDAYS

+9.2% WEEKENDS

Compared to 2022

FULL WEEK -1%

WEEKDAYS -1.6%

WEEKENDS -0.8%
EuroVelo Data Hub

EuroVelo Development Status Report (2023)

- 92,000+ km in total
- 66% of EuroVelo is ready to cycle
- 37% with EuroVelo signs
ECF gratefully acknowledges financial support from the LIFE Programme of the European Union

EuroVelo Data Hub

NEW REPORT:

“Various EuroVelo channels with increased community engagement”

EuroVelo Digital Statistics Report (2023)

- 2,594,967 web sessions (+28%)
- 1,537,088 web visitors (-15%)
- 57,498 professional visitors (+302%)
- 4,879% increase in mobile usage
- 2,282 pro web app sessions (+54%)
- 58% mobile web visitors
- 40.1% click rate for monthly newsletter in February 2023
- 20.7% growth through Google search (compared to 2022)
- 4m4s average session time per visitor
- 40% of web visitors are female

Social Media Followers:
- Facebook: 51,900+ (+7% growth)
- Twitter: 11,800+ (+5% growth)
- Instagram: 22,300+ (+52% growth)

Newsletter Subscribers:
- 8,988 (+14% growth)

GPX Tracks Downloads:
- 340,800+ (+124% from Jul-Dec 2023)

FULL ROUTE AND COUNTRY STATISTICS CAN BE FOUND ON PAGES 2-4
Economic impact estimations:

- Europe (2012): €44 billion economic impact a year
- Germany (2009): €9.2 billion economic impact a year
- Italy (2019): €4 billion economic impact estimated a year
- The Netherlands (2021): €1 billion economic impact from Dutch in the NL
- France (2019): €4.2 billion direct economic impact estimated a year
- France-La Loire à Vélo-900km section of EuroVelo 6 (2023): €0.5 billion economic impact a year
Conclusions

- **Cycling tourism offers**: new infrastructures, services, communication solutions, etc.
- Cycling tourism interest and visibility is growing – **large potential for growth**!
- But **we need more data** on the usage and economic impact to boost it even more!
Latest trends and data on cycling tourism

Our speakers:

**Christian Tänzler**
Allgemeiner Deutscher Farrhad Club-ADFC (Germany)

**Heiko Riekenberg**
Bikemap / CycleSummit

**Russell Walters**
Adventure Travel Trade Association-ATTA

**Agathe Daudibon**
ECF

Moderator: Jessica Casagrande, ECF
Q: What is your organization’s perception of adventure travel activity trends, based on consumer demand and bookings in 2022 and going into 2023?

Base: All respondents excluding those left blank (n=120)

Source: 2023 Adventure Tour Operator Snapshot Survey

**“HOT” TRENDING ADVENTURE ACTIVITIES**

1. Hiking/Trekking/Walking
2. Cultural
3. Culinary/Gastronomy
4. Cycling (mountain/non-paved surface)
5. Safaris/wildlife viewing
6. Wellness-focused activities
7. Cycling (electric bikes)
8. Cycling (road/paved surface)
9. Photography (wildlife/nature)
10. Birdwatching (NEW in top 10)
**“HOT” TRENDING HIGH-DEMAND TRIPS**

1. Custom Itineraries
2. Remote Destinations/Trails
3. Expert or Specialist-Guided Trips
4. Slow Travel Itineraries
5. Greener/Sustainable/Low Impact Itineraries
6. Solo Travelers (NEW in top 10)
7. Family/Multi-Generation
8. Off-Peak Travel (NEW in top 10)
9. Longer-Duration (NEW in top 10)
10. Domestic/Regional Travel

**Q:** What is your organization’s perception of the following itinerary trends based on consumer demand and bookings throughout 2022?

**Base:** All respondents excluding those left blank (n=133)

**Source:** 2023 Adventure Tour Operator Snapshot Survey
Q: Does your business currently hold (or are you working to acquire) any kind of sustainability certification? (check all that apply.)

Base: All respondents excluding those left blank (n=110)

Source: 2023 Adventure Tour Operator Snapshot Survey

68% have or are working toward a sustainability certification (up from 45% in 2021)

- Travelife for Tour Operators: 19%
- B Corporation: 13%
- Tourism Declares Climate Emergency (signatory): 7%
- GSTC Criteria (by GSTC Accredited certification bodies): 3%
- Adventure Green Alaska Standards: 3%
- EarthCheck: 2%
- Chile Sistema de Distinción en Turismo Sustentable (Sello S): 2%
- Rainforest Alliance (Preferred by Nature): 1%
- Ecotourism Australia: 1%
- Costa Rica Certification for Sustainable Tourism (CST): 1%
- Other: 13%
Q: Still thinking of this popular 2022 itinerary, please estimate the percentage of your trip cost spent with local suppliers based in the host market. Please only estimate your spend with suppliers from the host market, and exclude all trip expenditure with suppliers based in other nations, trip margin, and your trip operating costs.

Q: If you can, please estimate what your average guest spends on local handicrafts or souvenirs on this popular trip in the host destination.

**Base:** All buyer respondents excluding those left blank (n=68)

**Source:** 2023 Adventure Tour Operator Snapshot Survey

---

76% of the $3,000 total trip cost is spent with local suppliers (up from 65%-70% in recent years)

\[ \text{76\%} \times \$3,000 = \$2,280 \]

+ $189 average spend per guest on local handicrafts or souvenirs
Latest trends and data on cycling tourism

Our speakers:

Christian Tänzler
Allgemeiner Deutscher Farrhad Club-ADFC
(Germany)

Heiko Riekenberg
Bikemap / CycleSummit

Russell Walters
Adventure Travel Trade Association-ATTA

Agathe Daudibon
ECF

Moderator: Jessica Casagrande, ECF
Thank you!

Do you have any questions? eurovelo@ecf.com
Tips and tools to make your cycling tourism offer a quality one

Keynote

6 March 2024
ITB Berlin

Alexandra Fournier
Quality – answering the first needs of cyclists

- Users need quality cycle routes to get started

- **Safety** as a primary need to fulfil with cycling infrastructure

- Different solutions to approach cycle route quality

- ‘European Certification Standard’ is ECF’s methodology to address the quality of EuroVelo and long-distance cycle routes in general
The European Certification Standard – a ready-to-use tool

Objective: match European users’ expectations and identify the level of development

Three target groups of users

Double use:

- **Survey** – a methodology to assess the deficiencies and investments for improvements
- **Certification** – a label to market EuroVelo routes as a high-quality cycling route

*Picture: Colmar, France along the certified EuroVelo 15 – Rhine Cycle Route © DEMARRAGE project*
Tips and tools to make your cycling tourism offer a quality one

### Three pillars of quality – the criteria categories of ECS

<table>
<thead>
<tr>
<th>Route infrastructure</th>
<th>Services</th>
<th>Promotion &amp; Marketing</th>
</tr>
</thead>
<tbody>
<tr>
<td>- Continuity</td>
<td>- Accommodation</td>
<td>- Web communication</td>
</tr>
<tr>
<td>- Route components</td>
<td>- Food, drink and rest areas</td>
<td>- Print communication</td>
</tr>
<tr>
<td>- public road,</td>
<td>- Bike repair and bike shops</td>
<td>- Other promotion and information tools</td>
</tr>
<tr>
<td>- painted cycle lane,</td>
<td>- Other services</td>
<td></td>
</tr>
<tr>
<td>- cycle path,</td>
<td>- Bookable offers</td>
<td></td>
</tr>
<tr>
<td>- greenway, cycle</td>
<td></td>
<td></td>
</tr>
<tr>
<td>- street, agricultural</td>
<td></td>
<td></td>
</tr>
<tr>
<td>- management road</td>
<td></td>
<td></td>
</tr>
<tr>
<td>- Surface and width</td>
<td></td>
<td></td>
</tr>
<tr>
<td>- Gradients</td>
<td></td>
<td></td>
</tr>
<tr>
<td>- Attractiveness</td>
<td></td>
<td></td>
</tr>
<tr>
<td>- Signing</td>
<td></td>
<td></td>
</tr>
<tr>
<td>- Public transport</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Road safety**
I – High-quality and safe infrastructure

Ideal cycling trip

Dutch people most often cite the following characteristics as part of an ideal bike ride:

1. Surroundings 87%
2. The bicycle 79%
3. Safety and comfort cycle paths and streets 72%

Source: Blauw, Recreational cycling in the Netherlands, 2021

EuroVelo 13 – Iron Curtain Trail © EuroVelo
II – Qualitative services

- Accommodations:
  - One-night stays available
  - A variety of types to meet different needs
  - Safe bike storage
- One-way bike rental
- Luggage transfer
- Rest areas
- Drinkable water and toilets

→ Essential to the development of successful cycling tourism products

→ Developments within the ICTr (EuroVelo 13 – Iron Curtail Trail) and Biking Baltic Upgrade (EuroVelo 10 – Baltic Sea Cycle Route) Interreg projects
Zoom on cycling-friendly schemes

Different systems adapted to national and/or regional needs: 28 on EuroVelo.com/cycling-friendly-schemes

A useful tool to guide cycling tourists to service providers that will fulfil their specific needs: safe and secured bike parking, repair tools, information, washing and drying facilities, possibility to recharge e-bike batteries and other electronic devices, etc.

ADDITIONAL CRITERION: At least some accommodation available on the daily section are certified as cyclist-friendly.
III – Quality of information available: marketing & promotion

- Cycling tourists are **multimedia users** to prepare and orient themselves.

- **Printed materials** (maps, guidebooks, etc) are still relevant and important.

- **Signing** is still the most used navigation resource.
III – Quality of information available: marketing & promotion

Digital information:

- **EuroVelo.com** as a centralised platform redirecting to national and regional websites

- Importance of availability of **GPX downloads**

- Large use of **apps**
Who can develop a high-quality cycling product?

**Private stakeholders:**
- development of itineraries using the existing cycling routes,
- creation of new services/offers with cycling-friendly certification,
- marketing and communication online, printed and ads.

**Public stakeholders:**
- development and maintenance of the cycle routes and,
- services such as rest areas, drinking fountains, but also luggage transport (Luxembourg example), public transport, etc.
- information on the route (boards, signs), marketing and communication online and on printed material (flyers, etc)
Thank you!

Do you have any questions?  
Alexandra Fournier  
EuroVelo & Projects Coordinator  
a.fournier@ecf.com 

Support us to connect Europe by bicycle!

Follow EuroVelo on

Facebook Instagram LinkedIn X Youtube
Digital tools to help businesses and destinations attract pedal-powered tourists

6 March 2024
ITB Berlin

EuroVelo.com
Digital tools to help businesses and destinations attract pedal-powered tourists

The EuroVelo.com portal

Hub for cycling tourism in Europe:
• Route destinations
• Country destinations

1.5 million visitors in 2023

+25% page views in 2023
Digital tools to help businesses and destinations attract pedal-powered tourists

The EuroVelo.com portal

Interactive map + NEW route planner

ECF gratefully acknowledges financial support from the LIFE Programme of the European Union
Digital tools to help businesses and destinations attract pedal-powered tourists

The EuroVelo.com portal

- Free GPX download
- Articles & inspiration

ECF gratefully acknowledges financial support from the LIFE Programme of the European Union

One Thousand Memories: Bikepacking Madrid to Trondheim

May 31, 2021

Audrey Daniel takes us along on her epic 5,000+ km adventure from the Highlands of Spain to Northern Europe’s highest peak, marking the closing of a lifetime chapter for him. He weathered mental and climactic challenges, and grew as a person in the process. Accompanying this article is a feature-length...

Le Grand Tour

May 21, 2021

The Cycling Europe Andrew J. Tyson is a reference for English-speaking cycling tourism fans—but a great canvas of EuroVelo routes too. In the summer of 2022, he went on a Grand Tour from Nantes to Holland and back, following no less than four EuroVelo Routes. Join Andrew on his adventure.

Cycles4GlobalGoals: born of a pedal and a dream...

July 9, 2021

Trace the path of Wouter and Adrie on their 14,000 European adventures to raise awareness for the importance of the Sustainable Development Goals. From the Romanian countryside they cycle along the continent’s two most important rivers, before finally reaching the Netherlands. On their way they meet...

Download this stage in GPX →
Digital tools to help businesses and destinations attract pedal-powered tourists

Bookable offers on EuroVelo.com

An international spotlight for your cycling tourism offer!

3 languages (EN, FR, DE)

Filter selection and tailoring
Digital tools to help businesses and destinations attract pedal-powered tourists

Curious?

Get in touch
eurovelo@ecf.com

Support us to connect Europe by bicycle!

Follow EuroVelo on

ECF gratefully acknowledges financial support from the LIFE Programme of the European Union
Connect with the biggest community of adventurers

IRIS
Business Development Director Travel
iris@komoot.de
Our mission is to make great outdoor adventures accessible to all.
Europe’s biggest outdoor platform
International community
100% connectivity with the user’s favorite devices

Reach and Markets

Every 10th Benelux uses komoot

More than 38 million registered users* worldwide

- 7.7 % France
- 7.4 % UK
- 6.8 % Italy
- 4.5 % Netherlands
- 3.9 % Spain
- 3.1 % Belgium
- 3.0 % Eastern Europe
- 3.0 % USA
- 8.0 % others

* of which over 20 million in the German speaking market.
Excellent app

An absolutely imperative app if you are a frequent biker and want to get around safely in unknown areas.

Community Relevance

In the ADFC Cycling Travel Analysis 2023, over 12,500 respondents showed that komoot is the most popular app used by outdoor enthusiasts on a bike trip.

Source: ADFC Bicycle Travel Analysis 2023
Real-World Activity Trends

Our Explorer Insights - the treasure box for our partners with a lot potential for their product development
- Monthly report on activities in your region
- Users by home country
- Activity share in your region
- Average distances, durations, and elevation per activity

Save the outlay of expensive field studies and work with komoot!

Switzerland

Users by Home Country
- Switzerland: 75.35%
- Germany: 11.20%
- France: 3.08%
- ROW: 2.89%
- Italy: 2.30%
- Netherlands: 1.29%
- 3 more

77,701 Users in Destination
582.2k Number of Tours in Destination
Data driven product development

Explorer Insights for tailoring outdoor offers

Case Study: VisitFlanders used komoot data to build a visitor-centered hiking product.

- Tour distances, durations, where are users active
- 11 new hiking Collections born and promoted
Get in touch!

IRIS
Business Development
Director Travel
iris@komoot.de
Bertrand Charlet

bertrand@mhikes.com
Phone: +33 6 40 69 31 74
Guiding the cyclists but not only!

One Tech for all our apps - configurable

- **Of course : we guide in Off-line mode!**
  - Guidance on track with vocal system
  - POIs
  - Partners on track and stage list

- **More than that :**
  - The full roadbook in a day by day description
  - All activities set for the day
  - Vouchers and general descriptions
  - Push notif live or set before
  - POIs & Partners feedback
Protracer: win time in your back end production

- **Key features:**
  - Track creation board:
    - Use the editor app
    - Import GPX
    - Plot manually
  - Partners & Roadbook creation
  - Roadbook management system for win of time during season
  - Statistics available
  - PDF printing for Roadbook
  - APIs opened

- **Administration**
  - Right system to provide only the needed part to each customers and sell options

**Special key feature:** Trip builder enabling a Dynamic service package creation easily
Further use of the app: use the data!

- Registering of the user gpx track for a statistic display → help you at looking where to improve the route!
THANK YOU

Bertrand Charlet
bertrand@mhikes.com
Phone : +33 6 40 69 31 74
Unlock the Power of Cycling Tourism

Hartmut Wimmer, Founder & CEO
We are building the digital outdoor ecosystem that serves as a global travel guide.
Our map-based travel guide is automatically filled in the proven structure for guests and search engines. Your content is optimized and enriched with maps, webcams and weather data.
The alliance of the officials with 5,000+ Partners

- Tourist Offices
- Guides
- Accommodations
- Protected Areas
- Trail Managers
- Associations
Community & Content Reach

Content is viewed 5 times more on our platform than on brands’ individual channels, with the potential to reach more than 60 million users.
Analytics & Insights

We measure the entire user journey from inspiration to trip planning and on-site navigation, analyzing destination data – for you to learn how to improve your product.
European Trails

a hub of the

Potential partners

On the European level

and national organizations
Certifications

Harmonization & Integration of sustainability

Unified communication of the classifications

Quality scores (Draft)

<table>
<thead>
<tr>
<th>GFT Criteria</th>
<th>Indikator</th>
<th>Score</th>
</tr>
</thead>
<tbody>
<tr>
<td>Trail Management</td>
<td></td>
<td>100</td>
</tr>
<tr>
<td>Quality of Experience</td>
<td></td>
<td>82</td>
</tr>
<tr>
<td>Trail Information &amp; Guidance</td>
<td></td>
<td>56</td>
</tr>
<tr>
<td>Sustainability</td>
<td></td>
<td>94</td>
</tr>
<tr>
<td>Culture, Heritage &amp; Communities</td>
<td></td>
<td>79</td>
</tr>
</tbody>
</table>
We digitize the rules for the use of nature.

The information must be integrated in every digital service.
Join the Alliance of the Officials

Download this presentation from: business.outdooractive.com
Thank you for joining!

Stay in touch with EuroVelo
eurovelo@ecf.com
THEME UNVEILED & CALL FOR ABSTRACTS OPEN!
EuroVelo and cycling tourism at ITB Berlin
5-7 March 2024

WED 6 March

Hall 3.1b
Green Stage 14:50 - 15:40

Boosting the growth of cycling tourism with data, quality and digital tools

THU 7 March

Hall 4.1b
Lighthouse Stage 14:30 - 14:50

Solutions for sustainability of long-distance cycle routes - focus on EuroVelo 10 and 13