Toolkit for the Development of Transnational Cycling Products

April 2023
ECF, Belgium
Introduction on EuroVelo 1 and why this toolkit?
EuroVelo 1: a transnational project

One of the highest potential within EuroVelo:

- The attractiveness of the Atlantic coast
- Diverse localities and climates (from Scandinavian auroras across majestic Irish coast to sunny beaches of Portugal)
Why is EuroVelo 1 such a successful project?

EuroVelo 1 has **great potential** in itself: *diverse landscapes, great tourism attractivity, various and rich cultural offers etc.*

**National and regional stakeholders** have made great developments on EuroVelo 1: *cycling infrastructures, cycling friendly services, communications including national websites, etc.*

European funded project « AtlanticOnBike » has produced great results, including the guideline document *Elaboration and evaluation of new cycling tourism packages/bookable offers*, (from the original AtlanticOnBike project) which contains a methodology on sustainable tourism offers.

« AtlanticOnBike » **project extension** aims to sustain those results.
Introduction to the “Toolkit for the development of transnational cycling products”

- **Why the toolkit?** Help develop more transnational products and bookable offers on EuroVelo 1 – Atlantic Coast Route based on previous work.

- **How was the toolkit developed?** Based on interviews with key stakeholders: tour operators “Saddle Skedaddle” (UK) and “Discover Norway”, and consortium “La Vélodyssée partnership” (French section of EuroVelo 1) led by ECF.

- **What to find in it?**
  - Identification of **key factors for success** to create transnational cycling products on EuroVelo 1.
  - Sharing of **best practices** from destinations with successful cooperation with private stakeholders.
Findings and recommendations to develop transnational cycling products on EuroVelo 1
5 key factors of success for cycling products in general:

1. **Logistical feasibility** of products, streamlined and easily manageable both for tour operator and customer.
2. **Appealing products**, with quality infrastructure, attractions, signage, and adequate cycling friendly services (accommodation/rest areas/bike rentals etc.).
3. **Availability of intermodality** options (train/bus/ferries + bike) as transportation factor to access and depart from the destination.
4. **Close cooperation** with relevant local and (inter)national organisations/public authorities for better promotion, advocacy and development.
5. **Brand recognition** by customers, marketing and promotion of products - attending relevant events, workshops, web and social media activity.
Main finding: transnational products face multiple obstacles

- **Market demand:**
  - No high demand for transnational cycling products at the moment
  - Brand recognition is not high enough to overpass logistical obstacles

- **Logistical feasibility – very complicated to handle:**
  - The longer the tour is, the more difficult it is to organise the logistics
  - Visa and administrative procedure
  - Intermodality options
  - Relation with service providers: network, language, working habits etc.
  - The offer needs to be reliable and access to knowledge about the product is even more challenging transnationally (infrastructure, signage, services etc.)
Other interesting finding: high potential for EuroVelo 1 as a product

• ‘We believe that EuroVelo offers a basis for a successful product’, Saddle Skedaddle

• ‘Our opinion is that EuroVelo could serve as a solid basis for successful tourism products’, Discover Norway

EuroVelo is attractive but would still require more recognition as a brand by customers and companies.

• In 2022, €1,000,000 revenue was generated by tour operators on La Vélodyssée when it was €100,000€ in 2015: ‘this is a market that has made good progress’, La Vélodyssée
Context on tour operators’ customers

- ‘We are targeting people who have already been on tours, 45% are returning customers and 55% new customers’, Saddle Skedaddle

- ‘In 2018, only 0.4% of users surveyed on La Vélodyssée had used an agency or tour operator’ (out of a sample of 2,900 users and a high representation of day-trip users).

- In 2022, 11% of German cycling tourists sought assistance from a tour operator according to ADFC Bicycle Travel Analysis.

- The logistical issues encountered by tour operators organising transnational offers are quite similar to the obstacles that individuals may themselves encounter in planning a transnational cycling trip. The transnational dimension makes the route more attractive but also more challenging to cycle. This may discourage users from cycling on EuroVelo 1 - Atlantic Coastal Route.
Recommendations on how to develop cycling products on EuroVelo 1

#1 Ensure the quality of the product: infrastructure, signage, services etc.

#2 Increase the awareness of the brand EuroVelo 1 – Atlantic Coast Route

#3 Support the creation of new services necessary for customers, including intermodality options and transnational use of services

#4 Bring visibility on existing offers to end-users

#5 Build good relations with tour operators and demonstrate the added value of EuroVelo 1
Highest potential transnational products areas

When trying to encourage the development of transnational cycling products on EuroVelo 1, stakeholders should focus on where it is the most relevant considering existing intermodal connections and usage relevance.
Relevant links for quality services

- European Cycle-Friendly Service Network Concept - Findings from a study, 2020
- Tourism Star Ratings - Quality Assurance | VisitScotland.org
- Cycling Friendly Services schemes in Europe
Summary and extended versions of interviews:

- with two tour operators (Saddle Skedaddle and Discover Norway)
- and one consortium (La Vélodyssée partnership, representing EuroVelo 1 in France)
## Tour operator data (Saddle Skedaddle and Discover Norway)

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<thead>
<tr>
<th></th>
<th>Saddle Skedaddle (UK)</th>
<th>Discover Norway</th>
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<tbody>
<tr>
<td><strong>Founding year</strong></td>
<td>1995</td>
<td>1998</td>
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<tr>
<td><strong>Number of tours</strong></td>
<td>190 guided and self-guided (world-wide)</td>
<td>10 self-guided (in Norway)</td>
</tr>
<tr>
<td><strong>Number of clients – cycling tourists (2023)</strong></td>
<td>4000</td>
<td>600</td>
</tr>
<tr>
<td><strong>Average age range of clients</strong></td>
<td>50s-60s</td>
<td>50s</td>
</tr>
<tr>
<td><strong>Clients’ profile and preferences</strong></td>
<td>High disposable income, prefer self-guided leisure tours</td>
<td>High income, coming from abroad, prefer leisure trips and outdoors, staying for two-week trips</td>
</tr>
<tr>
<td><strong>Bike rentals</strong></td>
<td>Yes (also in co-op with external partners)</td>
<td>No (only via external partners)</td>
</tr>
<tr>
<td><strong>Hotel accommodation provided</strong></td>
<td>Yes</td>
<td>Yes</td>
</tr>
<tr>
<td><strong>Transnational tours</strong></td>
<td>No</td>
<td>No</td>
</tr>
<tr>
<td><strong>Partners</strong></td>
<td>Adventure Travel Trade Association, Sustrans, ECF, national tourism boards</td>
<td>Responsible travel (web platform), Cycle Summit, local authorities</td>
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La Vélodyssée partnership (French section) data

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<tr>
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<th>La Vélodyssée partnership – EuroVelo 1 in France</th>
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<tbody>
<tr>
<td>Number of partner tour operators (2023)</td>
<td>18</td>
</tr>
<tr>
<td>Number of offers on website (2023)</td>
<td>77</td>
</tr>
<tr>
<td>Estimated revenue generated by tour operators (2022)</td>
<td>€1,000,000</td>
</tr>
<tr>
<td>Estimation of number of tours sold (2022)</td>
<td>549</td>
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<tr>
<td>Estimation of number of clients (2022)</td>
<td>1,400</td>
</tr>
<tr>
<td>Transnational offers</td>
<td>No</td>
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</tbody>
</table>
Saddle Skedaddle interview
Discover Norway interview
La Vélodyssée partnership interview