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# Research and Information Service Briefing Paper

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## Cycling for leisure, recreation and tourism

### 1 Introduction

It has been a long standing objective of the Department for Regional Development (DRD) to increase the number of people who use a bicycle to complete everyday journeys such as to and from school, work and the local shop. Indeed, increasing bicycle use for utilitarian trips is a common objective of many cities and regions around the world with the benefits of cycling in terms of health, the environment and urban mobility well known.<sup>1</sup>

Despite this, utilitarian cycling remains a minority pursuit in Northern Ireland, with the 2011 census showing less than 1% of people in employment cycle to work;<sup>2</sup> this is virtually the same figure found in the 2001 census with the only significant increase (from a low base level) in cycling levels (+60%) recorded in Belfast (see table 1).

It is a common feature of countries with low levels of cycling for the bicycle to be viewed as a recreational rather than utility vehicle<sup>3</sup> and this appears to be the case in Northern Ireland: data from the DRD's annual travel survey show cycling accounts for only 1% of all trips<sup>4</sup> whereas the continuous household survey identifies cycling to be the third most popular form of physical activity in Northern Ireland (9% of survey

<sup>1</sup> Damant-Sirois, G., Grimsrud, M. and El-Geneidy (2013) What's your type: A multidimensional cyclist typology. Conference Proceedings: Transportation Research Board 93th 39 Annual Meeting [online] available from: <http://nia1.me/208>

<sup>2</sup> NISRA (2012) Census 2011: Key Statistics for Northern Ireland [online] available from: <http://nia1.me/1zj>

<sup>3</sup> European Parliament (2012) The European Cycle Route Network Eurovelo [online] available from: <http://nia1.me/1yj>

<sup>4</sup> DRD (2012) Travel Survey for Northern Ireland In-depth Report 2010-2012 [online] available from: <http://nia1.me/1z5>

respondents cycle)<sup>5</sup>. While bicycle ownership is not a good indicator of usage levels<sup>6</sup> it does go some way to support the suggestion that cycling is a popular recreational activity; the DRD's annual travel survey found that 39% of households in Northern Ireland owned at least one bicycle in 2012.<sup>7</sup>

Cycling's popularity as a recreational pursuit, coupled with a growing interest in sustainable tourism, health and the environment is making cycling an increasingly popular holiday activity which in turn generates economic impacts from visitor spending and employment. Indeed, the European Parliament estimates that recreational and tourism cycling is worth £36 billion<sup>8</sup> per annum to the EU economy.<sup>9</sup>

Table 1: Method of Travel to Work (Bicycle) by Local Government District, All usual residents aged 16-74 years (excluding students) in employment and currently working, Census 2001 & 2011

LGD	2001		2011		% Change
	Count	Per cent	Count	Per cent	
Northern Ireland	5,959	0.87	6,252	0.9	4.92%
Antrim	433	1.93	253	1.1	-41.57%
Ards	189	0.57	132	0.4	-30.16%
Armagh	75	0.34	68	0.3	-9.33%
Ballymena	230	0.87	155	0.6	-32.61%
Ballymoney	53	0.47	27	0.2	-49.06%
Banbridge	56	0.3	52	0.2	-7.14%
Belfast	1,429	1.42	2,282	2.1	59.69%
Carrickfergus	115	0.67	113	0.7	-1.74%
Castlereagh	289	0.96	395	1.3	36.68%
Coleraine	263	1.14	185	0.8	-29.66%
Cookstown	58	0.47	63	0.4	8.62%
Craigavon	476	1.44	420	1.1	-11.76%
Derry	200	0.55	186	0.5	-7.00%
Down	191	0.71	127	0.4	-33.51%
Dungannon	67	0.36	81	0.3	20.90%
Fermanagh	95	0.42	128	0.5	34.74%
Larne	77	0.57	63	0.5	-18.18%
Limavady	133	1.03	46	0.4	-65.41%
Lisburn	526	1.11	455	0.9	-13.50%
Magherafelt	56	0.34	24	0.1	-57.14%
Moyle	25	0.42	20	0.3	-20.00%
Newry & Mourne	146	0.46	223	0.6	52.74%
Newtownabbey	230	0.63	275	0.7	19.57%
North Down	347	1	316	0.9	-8.93%
Omagh	114	0.61	99	0.5	-13.16%
Strabane	86	0.64	64	0.5	-25.58%

Sources: NINIS, NISRA, Table KS15W (2001); Table KS701

<sup>5</sup> DCAL (2010) Experience of Sport and Physical Activity in Northern Ireland [online] available from: <http://nia1.me/209>

<sup>6</sup> European Parliament (2012) The European Cycle Route Network Eurovelo [online] available from: <http://nia1.me/1yj>

<sup>7</sup> DRD (2012) Travel Survey for Northern Ireland In-depth Report 2010-2012 [online] available from: <http://nia1.me/1z5>

<sup>8</sup> The cited report used €euro. Conversions to sterling have been applied at a rate of £0.82 = €1. Current on 15<sup>th</sup> May 2014

<sup>9</sup> European Parliament (2012) The European Cycle Route Network Eurovelo [online] available from: <http://nia1.me/1yj>

## 1.1 Overview of paper

This paper explores the economic benefits of cycling tourism. There is no agreed definition for cycling tourism. However, for the purposes of the paper cycling tourism is defined as any cycling activity undertaken whilst on holiday or when away from home on day-trips.

Economic benefits are measured in terms of the effect on destinations from visitor numbers (trips) including, inter alia, expenditure, employment generation and business start-ups. This is demonstrated through a number of case studies from emerging and some better developed cycling tourism destinations in the UK, Republic of Ireland (ROI) and Europe.

By way of introducing the concept of cycling tourism this paper includes analysis of the cycling tourism market. Including:

- The size and value of the market in the UK and beyond; and
- The characteristics and preferences of cycle tourists.

## 2 Cycling tourism

Fresh from hosting the 'Big Start' of the *Giro d'Italia*, professional cycling's second biggest event, the potential for cycling tourism in Northern Ireland is a hot topic. The Northern Ireland Tourist Board (NITB) suggests the worldwide exposure brought by the event, which is broadcast in 174 countries, is worth an equivalent of £10m in advertising<sup>10</sup> with the potential to attract many cycling tourists. In the short term, 140,000 spectators were expected to attend the race (a figure that was clearly exceeded), including over 40,000 out of state visitors, generating £2.5 million for the economy.<sup>11</sup>

### 2.1 The cycling tourism market

While it may be a current topic, cycling tourism is not a new phenomenon. As far back as 1999, the sustainable transport charity, Sustrans, estimated that cycling tourism contributed some £695 million to the UK economy (in 1997), equivalent to just over £1bn in 2014.<sup>12</sup> This report identified a number of benefits of developing cycling tourism:

- Cycle tourism can provide **incentives for people to visit an area** and can help to attract new types of visitor who stays longer and spend more in a destination;
- Cycle tourism can **support existing local trade** (particularly in hospitality sector) and **offers business start-up opportunities** (such as bike-hire), particularly in rural areas;

<sup>10</sup> NI Business Info [online] Giro start gives boost to tourism businesses, 30<sup>th</sup> April 2014, available from: <http://nia1.me/21o>

<sup>11</sup> Ibid.

<sup>12</sup> This is the 1997 figure adjusted for inflation it is not intended to represent the current market value as this will be determined by a number of variables, not least participant numbers, which do not remain constant.

- It is an **environmentally sustainable** form of tourism with minimal impact on the environment and it can help reduce traffic congestion;
- It utilises existing and often under-used facilities such as **quiet laneways, canal towpaths and disused railway lines**; and
- Ultimately, those who participate in cycling while on holiday or as a leisure activity, **may then be encouraged to cycle more frequently** for other (utility) purposes.<sup>13</sup>

The Sustrans report sub-divides the cycle tourism market as follows:

- **Cycling holidays** involve one night or more away from home, where cycling is the principal purpose of the holiday. It can be centre based or as a tour involving staying at different places. A cycling holiday can also be sub-categorised into an organised package or independent tour.
- **Holiday cycling** – this involves day cycle rides from holiday accommodation or another place (such as a cycle hire at a railway station). This forms part of the holiday experience but is not necessarily the only one.
- **Cycle day excursions** – cycle trips of more than 3 hours duration made from home principally for leisure and recreation.<sup>14</sup>

This division is significant as day excursions are almost 100 times more frequent in volume to Holidays.<sup>15</sup> However, overnight trips (holidays) generate higher revenue: According to the European Parliament, cycle tourists spend on average €55.00 per day (£46.20) including accommodation. With a weighted average length of stay of 7.7 days, the average spend per trip is €434 (£356.00)<sup>16, 17</sup>.

In the UK there are an estimated 150 million cycle tourism trips per year, of which only 1.23m involve an overnight stay;

- The **1.23 million overnight cycle trips, contribute over €540m** to the economy
  - This equates to an average spend of €439 (£360) per trip
  - Or €57 (£46.75) euro per day
- The **148 million day trips generate €2.29bn** (£1.88bn)
  - This equates to an average spend of €15.47 per trip (£12.69)<sup>18</sup>
- Although overnight trips account for less than 1% of total cycling tourism trips in the UK they **account for almost 20% of the revenue** generated.<sup>19</sup>

Transform Scotland has published a report on the benefits of cycle tourism in Scotland.<sup>20</sup> This report highlights the many positive aspects of promoting cycle tourism (environmental and health/well-being), including significant economic benefits for the

<sup>13</sup> Sustrans (1999) Cycle Tourism: Information Pack [online] available from: <http://nia1.me/20x>

<sup>14</sup> Ibid

<sup>15</sup> eijgelaar, Peeters & Piket, 2011 quoted in Zovko (2013) [online] available from: <http://nia1.me/1yi>

<sup>16</sup> Conversions to sterling have been applied at a rate of £0.82 = €1. Current on 15th May 2014

<sup>17</sup> PAGE 48 of Weston, R., Davies, N., Lumsdon, L. and McGrath P. (2012) The European Cycle Route Network: EuroVelo Study [online] available from: <http://nia1.me/1yj>

<sup>18</sup> As above PAGE 36

<sup>19</sup> As above PAGE 36

<sup>20</sup> Zovko, I. (2013) The Value of Cycling Tourism: Opportunities for Scotland [online] available from: <http://nia1.me/1yj>

Scottish economy. This report indicates cycling tourism contributes **£239m per year to the Scottish economy**.<sup>21</sup> This is comparable to the Republic of Ireland's **cycling tourism market, which is estimated to be worth €240m** (Weston, et al, 2012) equivalent to [approximately] £196m.<sup>22</sup>

### Case Study: The Swiss Cycling Network.

A good example of the expenditure brought about by cycling is the Swiss Cycle Network - Veloland Schweiz. The Swiss cycling network has been monitored extensively from the project inception and use has been high from early stages of development:

- The total number of cyclists per annum was 3.4 million in 1999 and rose to 5 million in 2009, almost a 50% increase;
- After a temporary decline to 4.4 million in 2010 due to poor cycling weather, total volume was back at 5 million in 2011;
- Around 220,000 of these trips are overnight cyclists;
- the other 4.8 million are day excursions
- In 2011, the total turnover from all cyclists on the Veloland network was estimated at €118 million (CHF 143m or £96.76m)
- On average, overnight holiday cyclists (staying more than 2 nights) spend €71 (£58) per day, of which €28 (£23) is on accommodation and €25 (£20.50) on food and drinks;
- Cycle tourists provide the majority of turnover due to their length of stay and high daily spending.
- **spending by cycle tourists, per kilometre travelled, is about 7 times higher than for day excursionists.**

Source:

Cycling tourism is generally associated with rural areas as many of Europe's long distance routes cross large parts of the open countryside across quiet roads and greenways. However, cycle tourism is not only a rural tourism product; many European tourist destinations are now encouraging visitors to cycle and walk while in their cities, rather than use cars; Amsterdam, Barcelona, Berlin, Budapest, Copenhagen, Lyon, Paris, London, Dublin and Seville have all introduced cycle schemes for residents and tourists alike.<sup>23</sup> According to Midgelly (2011):

*“Over the past ten years, bicycle-sharing schemes have developed from being interesting experiments in urban mobility to mainstream public transport options in cities as large and complex as Paris and London. Ten years ago, there were five schemes operating in five countries (Denmark, France, Germany, Italy and Portugal) with a total fleet of 4,000 bicycles (the largest was Copenhagen with 2,000 bicycles). Today there are an estimated 375 bicycle - sharing schemes operating in 33 countries in*

<sup>21</sup> Ibid.

<sup>22</sup> Weston, et al (2012)see: <http://nia1.me/1yj>

<sup>23</sup> European Parliament (2012) The European Cycle Route Network Eurovelo [online] available from: <http://nia1.me/1yj>

*almost every region of the world using around 236,000 bicycles (the largest is Hangzhou with an estimated 40,000 bicycles).”<sup>24</sup>*

### **Case Study: London’s public bike sharing scheme.**

London’s public bike sharing scheme is available 24/7, 365 days a year. There are more than 10,000 bikes and over 700 bike docking stations across London to help both local users and tourists get around quickly and easily.

The "Boris bikes" (nicknamed after London's Mayor Boris Johnson) are available to hire at the terminal with a bank card, allowing users to simply hire a bike, ride it where they like, then return it to any of the hundreds of docking stations across the city.

Costs start from £2 for 24 hour bike access, which includes unlimited journeys of up to 30 minutes. Extra charges are incurred if the bike is kept for longer than 30 minutes, therefore TfL advise users that if they are not using a bike to dock it; they can then take a different bike as many times as they like within the bike access period purchased.

Source: VisitLondon

## 2.2 What do cycling tourists want?

To date, **there has been no analysis of the cycling tourism market in Northern Ireland.** However, Fáilte Ireland, the Tourist Board in ROI has been actively developing a cycling tourism product since 2005; it published its first cycling tourism strategy in 2007.

### 2.2.1 Evidence from Ireland

At the time of the millennium cycling tourism in Ireland was buoyant, having just hosted the Tour de France in 1998. However, throughout the 2000s **cycling tourism in Ireland declined at an alarming rate:**

- In 2000 the number of overseas participants in cycling stood at 130,000.
- By 2004 this number had dropped to 85,000 and
- by 2005 it had fallen by a further 25,000.<sup>25</sup>

Surveys showed that **satisfaction with the quality of the product was falling rapidly**, with the percentage of very satisfied holiday makers falling from 76% in 2000 to 50% in 2005 and unsatisfied customers rising from 2% to 9% over the same period.

<sup>24</sup> Midgely, P. (2011) Bicycle Sharing Schemes: Enhancing Urban Mobility in Urban Areas [online] available from: <http://nia1.me/21d>

<sup>25</sup> Sustrans (2007) A Strategy for the Development of Irish Cycling Tourism: Conclusion Report [online] available from: <http://nia1.me/214>

Despite the decline, overseas visitors who cycled while in Ireland contributed an estimated €34.5 million (£28.3m) to the Irish economy in 2005.<sup>26</sup>

In 2007 Fáilte Ireland commissioned market research company, MORI, to investigate the Irish cycling tourism market. MORI found that **there was a perception among cyclists that Irish roads were unsafe**, while there was no alternative provision, by way of traffic-free routes, to cater for touring cyclists wanting to leave the cities to discover the countryside, or for families who wish to participate in cycling.<sup>27</sup> Additional problems, such as integration with public transport and a lack of bicycle related infrastructure (parking, bike shops) were also identified as weaknesses.

Key recommendations arising from this work included:

- Develop a designated cycling network around the country.
- Design the routes around particular themes e.g. local food/gastronomy trails;
- Improve cycle routes with better signposting, better road surfaces and greater safety for the cyclist;
- Vary the Irish cycling product and spread the network to take in places like Sligo, Donegal and the Wicklow mountains;
- Sort out adequate supporting public transport to help cyclists travel more extensively; and
- Work together to provide safe, clearly marked, well signed routes.

### 2.2.2 The “*Strategy for the Development of Irish Cycle Tourism*”

Based on what was learnt through this market research and analysis of a number of competitors, notably those from:

- Switzerland – The Swiss Cycling Network (Veloland Schweiz);
- Austria – The Danube Cycle Path; and
- Great Britain – The Coast to Coast (C2C) Cycle Route;

The “*Strategy for the Development of Irish Cycle Tourism*” sought to re-establish Ireland – particularly rural Ireland – as a cycling tourism destination. It was noted in the document that while visitor numbers in many of the countries urban centres were rising, the numbers of overseas visitors to the rural west (Mayo, Roscommon, Galway) had fallen by some 12% between 2003 and 2005.<sup>28</sup>

The strategy called for a range of infrastructural elements and “softer” measures:

- In terms of infrastructure the strategy identified the need for safe and attractive routes, it emphasised the need for greenway development;
- It called for improved cycle hire facilities; and
- integration between cycling and public transport;

<sup>26</sup> Ibid.

<sup>27</sup> Ibid.

<sup>28</sup> Sustrans (2007) *Strategy for the Development of Irish Cycle Tourism* [online] available from: <http://nia1.me/214>

- Softer measures include the tools to both attract visitors (marketing, website) and support them in destination (maps, information points).

The strategy proposed the development of cycling hub towns, in established tourist destinations, such as Westport in Mayo. These hubs would provide many of the facilities required by cycling tourists such as accommodation, hospitality, bike hire and also the opportunity to experience the local culture and heritage.

An advantage of the hub town concept is that it offers those wanting a single centre based holiday, such as a family, the opportunity to explore areas around them, returning each evening to the base. For more serious touring cyclists, hubs provide stop off points along a linear route which can be explored as part of a long distance trip.

Unlike the United Kingdom, and many of its European competitors, Ireland does not have a National Cycle Network, although one has been proposed. The cycling strategy identified an approximately 3000km long network running from Donegal along the West, South and South-east coasts and continuing along the East coast as far as the Northern Ireland border. The network identified is based along a mix of minor roads, and some greenways.

Greenways are vital for attracting the family market, which will often include inexperienced cyclists and/or young children.<sup>29</sup> This is a key market in Ireland:

- 38% of overseas cycling tourists travel in a group of family or friends which contain children; and
- 41% of domestic cycling tourists travel in a group of family or friends which contain children;

This has a significant bearing on the infrastructure and services required, and even the promotion and marketing of the offering, as **safe and traffic free cycling is essential for attracting this market.**

This is why countries such as Denmark, Germany and the Netherlands, who have invested heavily in segregated cycling infrastructure, can boast both high levels of utilitarian cycling and high levels of cycling tourism:

- In Denmark, for instance, cycling tourism accounted for 13% of total tourism turnover in 2008;
- in Germany, the direct annual turnover from cycle tourism (estimated to €3.9 billion per year or £3.2bn) makes up 3% of the turnover from all day and overnight tourism;<sup>30</sup> while
- Even in countries where there is not a strong tradition of utilitarian cycling, such as Italy and Spain, cycle tourism is an important product.<sup>31</sup>

<sup>29</sup> Smarter Travel (2009) Ireland's First National Cycle Policy Framework [online] available from: <http://nia1.me/21s>

<sup>30</sup> Weston, R., Davies, N., Lumsdon, L. and McGrath P. (2012) The European Cycle Route Network: EuroVelo Study [online] available from: <http://nia1.me/1yj>

<sup>31</sup> Ibid.

### 2.2.3 Other features of a cycling destination

More recently, Fáilte Ireland commissioned research (in 2013) to assess the current cycling tourism market in ROI. As part of this research consumers were asked what things make a good cycling destination. This was done with a view to informing future cycle tourism infrastructure development about the needs and preferences of the consumer.

In addition to riding traffic free, cycling tourists want routes that offer a rounded leisure/holiday experience by frequently incorporating interesting places to visit:

- Beautiful scenery is easily the most important destination attribute with respect to cycling;
- That said, the scenery needs to be varied, as too much of the same thing will become boring;
- Weather also ranks highly in preference however it's not the be all and end all; and
- Cycling routes incorporating attractive cities and towns (47%), followed by access to historical/cultural attractions (42%), and destinations that are easy to get to (41%) complete the list of attributes required to make a good cycling destination.<sup>32</sup>

As part of Fáilte Ireland's market research, in addition to asking respondents what makes an ideal cycling route, respondents were also asked to indicate their preference between pairs of route attributes (see figure 1), some of the most interesting findings are summarised below:

- Circular routes, where users start and finish in the same place, were preferred over linear (A to B) routes;
- Rural routes were favoured over more urban routes;
- Segregated traffic free routes were preferred, although surprisingly, 54% of respondents either had no preference or preferred routes on quiet roads;
- There was a strong preference for flat routes of less than 50km;

### 2.2.4 Characteristics of cycling tourists

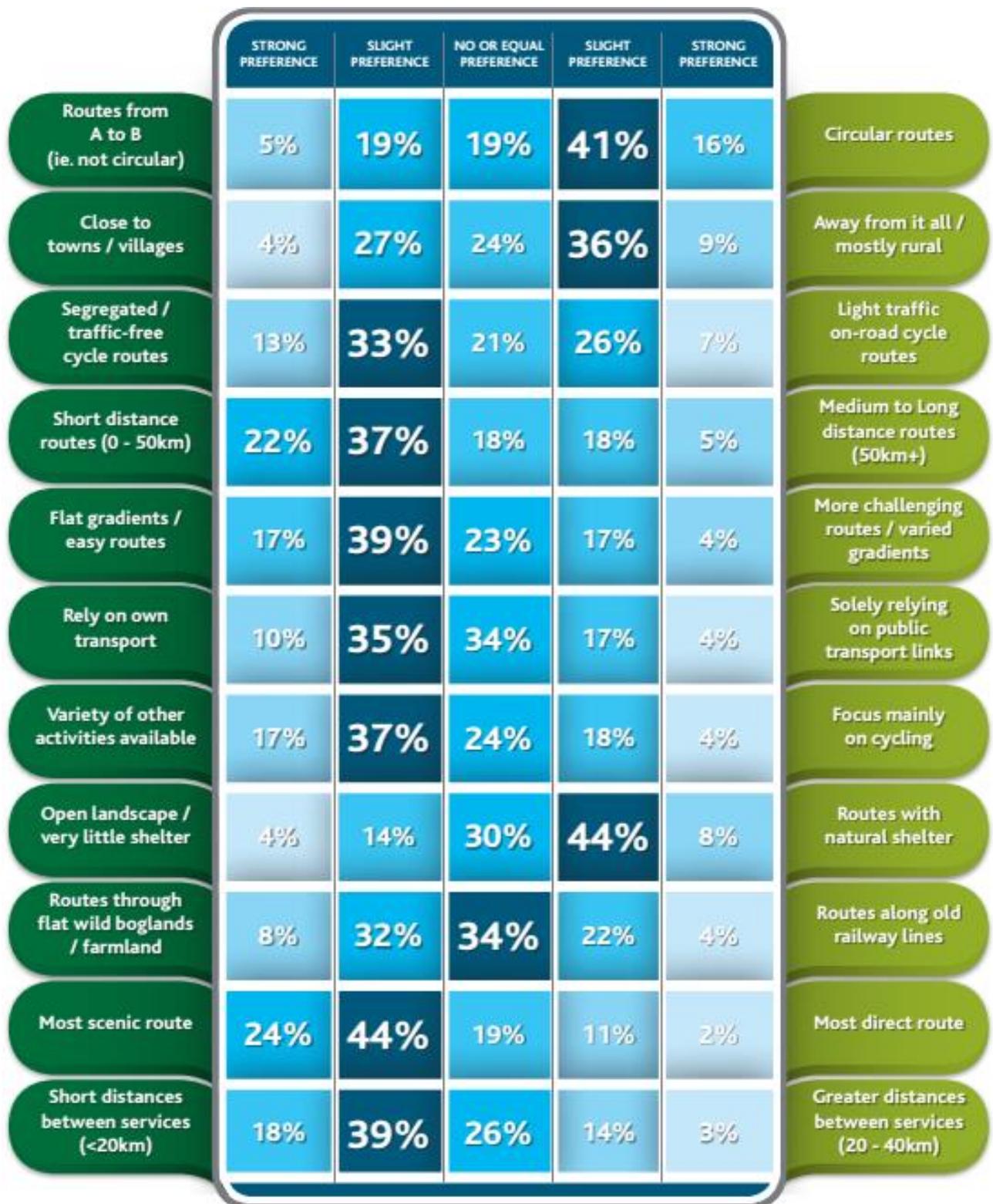
Using a combination of Fáilte Ireland and NITB intelligence we can identify the likely characteristics of a cycling tourist:

- Young men (25-50) are much more likely to go on a dedicated cycling tours;
- the difference between men and women declines significantly when cycling is part of a wider break;<sup>33</sup>
- visitors of any age may cycle, but it is more likely among younger adults;
- a significant portion travel in a group of family or friends which contain children; and
- cycling tourists tend come from the upper to middle socioeconomic classes (ABC1).

<sup>32</sup> Fáilte Ireland (2013) Cycling Market Research [online] available from: <http://nia1.me/1z1>

<sup>33</sup> NITB (2011) Activity Tourism: Sharing Success [online] available from: <http://www.nitb.com/FileHandler.ashx?id=1544>

Figure 1: What out-of-state visitors for Ireland desire from a cycling tourism destination



Source: Fáilte Ireland (2013)

### Case Study – The Great Western Greenway, County Mayo

The cycling tourism strategy sought to re-establish Ireland as a cycling tourism destination and already it looks to have succeeded with the country attracting 178,000 overseas cycling tourists in 2011, more than half were from Mainland Europe. This is a significant jump from the 60,000 who visited in 2005 and has been boosted significantly by the Great Western Greenway (GWG) Demonstration Project in County Mayo.

With financial support from The Department of Transport, Tourism and Sport and Fáilte Ireland Mayo County Council worked with local landowners to develop and build a walking and cycling Greenway, along the route of a disused railway. This development was based on recommendations made in the cycling tourism strategy.

The GWG was opened in two stages, with the first 14km from Newport to Mulranny, opening in 2010; it was completed in June 2011 and is the longest off-road cycling trail in ROI, travelling from the town of Westport to Achill Island in County Mayo.



An assessment of the greenway's economic impact commissioned by Fáilte Ireland demonstrates that tangible economic benefits have occurred as a direct result of the construction of the GWG. Estimates derived from the study suggest that all direct expenditure associated with the Greenway would contribute to a projected €7.2m (£5.9m) in spend in the local economy over a full year in 2011. This expenditure includes:

- nearly €940,000 (£770,800) in expenditure by local residents, made up of 34,400 “visits” to or “uses” of the Greenway, at an average spend of €27.31 (£22.40) per visit or use;
- over €3.5m (£2.87) in expenditure by domestic visitors, made up of 14,800 domestic visitors spending an average of €49.85 (£41) per day with an average length of stay of 4.8 days;
- nearly €2.8m (£2.3) in expenditure by overseas visitors, made up of 8,000 overseas visitors spending an average of €50.71 (£41.60) per day with an average length of stay of 6.8 days;
- contribution to a projected local economic impact of about €6.3m (£5.17m), which consists of nearly €2.8m (£2.3m) in spend by overseas visitors and over €3.5m (£2.87) in spend by domestic visitors;
- contribution to a projected national economic impact of nearly €2.8m (£2.3m), which consists of the spend by overseas visitors”

Source: Fáilte Ireland <http://nia1.me/21m>

### 3 The National Cycle Network in the UK

In 1995 Sustrans was awarded a major grant of £43.5 million of National Lottery funds by the Millennium Commission to develop the UK's National Cycle Network (NCN). This NCN was officially opened in June 2000 with 8,000 kilometres of cycling and walking routes passing through the centres of major towns and cities and linking urban areas with the countryside; the principal aim was to encourage people to take up cycling for the first time, or to start to cycle again.<sup>34</sup>

Today the NCN extends some 14,500 miles across the UK and although it was envisaged as a means of encouraging modal shift, many parts of the network, particularly the long distance routes, are now used primarily for recreation and leisure with many becoming tourism attractions in their own right,<sup>35</sup> such as the (UK's most popular cycle route) Sea to Sea (C2C) route.

**Case Study: Coast to Coast (C2C) route**

The C2Croute travels between the Irish Sea and the North Sea, from Cumbria to Tyneside across the Lake District and Pennines. The route is made up of:

- Main Roads – mainly short sections through urban areas – 4%;
- Minor Roads - quiet, country roads – 50%; and
- Cyclepaths/Off Road – disused railway lines etc. – 46%

It attracts over 100,000 trips per annum with between 10-15,000 people per annum cycling for the entire length. Many local businesses in the area, particularly the most rural, report that the cycle tourist trade is essential for their businesses and has supported their development through the years.

Research published in 2007 indicates that this route bucks the trend for having mainly day visitors with the majority staying overnight; 92,200 per annum compared to 43,500 day visitors. This has significant implications for the local economy when you consider that overnight visitors spend, on average, €57 (£46.74) per day compared to €15.50 (£12.71) spent by day visitors.

<sup>34</sup> Cope, Cairns, Fox, Lawlor, Lockie, Lumsdon, Riddoch & Rosen (2003) The UK National Cycle Network: an assessment of the benefits of a sustainable transport infrastructure. *World Transport Policy & Practice*, Volume 9, Number 1, (2003) 6–17

<sup>35</sup> Sustrans [online] National Cycle Network , available from: <http://nia1.me/20z>



The Great Western Greenway, as discussed earlier, and the soon to be opened Great Eastern Greenway (Newry, co. Down to Dundalk, co. Louth) are other notable examples on this island. However, cycling routes can also be built adjacent to an active railway ('Rails with Trails'); this is common in Western Australia, Canada and parts of Europe. These trails provide a good alternative to cycle lanes along heavily congested roads.

### 3.1.1 Can we rediscover our railways?

The first railways in Ireland were built in the 1830s and by the late Victorian period (around 1900) the railway network in the North of Ireland extended over 1000km and was accessible to within 5 miles by approximately 90% of the population.<sup>36</sup> The total route mileage in Northern Ireland following partition (1920) was 754 miles, consisting of 630 miles of 5ft 3in (1,600 mm) gauge and 124 miles of 3ft gauge.<sup>37</sup> The development or rather dismantling of the network is illustrated in figure 3.

Figure 3: Changes to the Northern Ireland Rail Network Since 1947



Source: Railways Taskforce (2000)

<sup>36</sup> Railways Taskforce (2000) *Interim Report of the Railways Taskforce on the Future of the Railway Network in Northern Ireland*. DRD: Belfast

<sup>37</sup> DRD (2012) *Future Railway Investment: A Consultation Paper* [online] available from: <http://nia1.me/1ym>

Case Study – Great Eastern Greenway?

Following the publication of the Irish cycling tourism strategy – and no doubt inspired by the Great Western Greenway – Louth County Council are about to open a greenway between Omeath Village and Carlingford in north County Louth, just across the border from Newry.

Like the GWG, this route been facilitated by the landowners who have granted permissive access to their land. This initial phase forms part of a more ambitious plan to develop the former Dundalk, Newry and Greenore Railway Line which opened between Greenore and Dundalk in 1873 and was extended to Newry in 1876; The line was closed in 1951. Within Louth this route extends a distance of some 35 kilometres and when crossing the border users will then be able to follow to Newry Canal towpath as far as Portadown where they can connect to Lisburn on quiet NCN roads before travelling on to Belfast along the Lagan towpath.

The provision of the Greenway in this area represents an opportunity to increase the attractiveness of this location for families and children and would have a positive implication increasing the length of stay and encouraging repeat visits.

Source: Louth County Council <http://nia1.me/21t>

## 4 Germany

In Germany cycle tourists are considered one of the most important tourist markets with 175 million cycling tourists per year:

- 153m of these are ‘soft cycling tourists’ where cycling plays a role in the holiday but is perhaps one of a number of activities undertaken;
- 22m of these are ‘actual’ cyclists who visit specifically for cycling across some of the country’s long distance routes.

It has been discussed already in this paper, but it is worth noting again, that actual cycling tourists spend considerably more (4 times, in Germany) than ‘soft cyclists’, many of whom may be on day excursions.

Table 2: Cycling Tourism market in Germany

	Number of tourists	Daily consumption	Annual turnover
Other cycle tourists	153 million	€ 16	€ 2.448 billion
Actual cycle tourists	22 million	€ 64,60	€ 1.421 billion

- In total, the annual turnover for cycling tourism is an estimated €3.9bn;
- Half of the turnover comes from spending on accommodation and food/drink;
  - Holiday apartments or private accommodation accounts for 43% of the accommodation while 19% camp;

- 92% visit local restaurants and 84% visit local attractions.
- The gross sales including travel costs and induced investments is € 9.163 billion;
- 186,000 people are employed directly or indirectly in the cycle tourism sector.

### 4.1 The National Cycle Network

German’s national cycle network (D-Routes) consists of twelve routes covering 11,700km. D-routes 1 to 6 run from west to east whereas D-routes 7 to 12 from north to south, connecting existing long distance bike paths.

Figure 4: The German Cycle Network



Source: <http://www.radnetz-deutschland.de/en.html>

The D-Route 3 is the highlight of the country's cycle network, with the German Tourist Board suggesting it sets "...new standards for the development of customer-friendly German long-distance routes."<sup>38</sup> It provides:

- uniform and consistent signage
- bilingual (English and German) information panels (every 10 to 15km) along the entire route.
- These include recommended itineraries history, attractions, accommodations and restaurants;
- 82 bike boxes and numerous support stands along the route.

## 5 EuroVelo

EuroVelo is a European cycle route network which seeks to offer a sustainable Trans-European Network that can be used by long-distance cycle tourists, as well as by local people making daily journeys. When completed (the target for this is 2020<sup>39</sup>) it will be made up of fourteen long distance cycle routes covering a distance of about 70,000 km (see Figure 5); around 45,000km have already been completed.<sup>40</sup> Four of these routes include destinations in the UK and Republic of Ireland (including the Great Western Greenway in Mayo). With route one, the Atlantic Coast Route, crossing Northern Ireland although why this has been routed down through Northern Ireland, apparently from L/Derry to Belfast is unclear.<sup>41</sup>

This route has many flaws, not least it requires crossing the Sperrins, which for many casual cycle tourists, would be difficult. Clearly a route that would take in the sights of the North Coast, would be more in keeping with the routes theme (Atlantic Coast). Already the Causeway Coastal Route is an established driving trail taking in many picturesque towns, villages and attractions including the Giant's Causeway and Carrick-a-Rede Rope Bridge.

The EuroVelo network is co-ordinated and managed by the European Cyclists' Federation (ECF) which is working to ensure that all routes offer high standards of design, signage and promotion throughout Europe. However, the development of the network to date has involved a wide range of stakeholders in different across the EU. The EuroVelo has not just been created from nothing, it makes use of existing cycling routes developed at a national level, therefore the main purpose of this project is more about upgrading these and re-branding them with standardised EuroVelo signage, interpretation and market communications.

<sup>38</sup> DTV [online] Study Cycle Tourism in Germany. Available from: <http://nia1.me/21n>

<sup>39</sup> ECF (2009) EuroVelo The European cycle route network [online] available from: <http://nia1.me/21h>

<sup>40</sup> ECF [online] EuroVelo: Network. Available from: <http://nia1.me/21g>

<sup>41</sup> The exact route of the Euro Velo is not known as maps provided by EuroVelo lack detail. However, it does appear that the road follows the general route of the A6 from L/Derry to Belfast, then from there it follows the A8 to Larne

Figure 5: Map of the EuroVelo Network



The main benefits to be derived from the development of the EuroVelo are its potential to:

- Enhance domestic tourism and to reduce tourist travel in relation to longer distances to destinations thus causing a high contribution to CO<sub>2</sub> emissions;
- Encourage cross border tourism with minimal environmental impact and a low impact on travel distances and low level of emissions;
- Encourage people to make use of public transport to get to the cycle destination, thus causing less environmental impact than private cars or air transport;
- Re-use assets such as old railways, forest tracks and canal towpaths;
- Stimulate economic development in rural areas which are not prime tourism destination areas;

- Bring about a diversification of land based businesses to provide accommodation, attractions and food and beverage for local consumption;
- Offer local residents an improved quality of life through enhanced physical exercise;
- Generate near zero carbon dioxide emissions by users on the route;
- Offer a form of slow travel which encourages interest in the richness of local gastronomy, heritage and community life across the different countries and regions of the EU.

### 5.1 EuroVelo Route Six

Some parts of the network are well advanced, such as Route 6 from the Atlantic to the Black Sea following the route of three of the largest European rivers: the Loire, Rhine and Danube; it therefore passes through France, Switzerland, Germany, Austria, Slovakia, Hungary, Serbia, Croatia, Bulgaria and Romania, as shown below.

Figure 6: Map of the EuroVelo Route Six



Route 6 is not complete as yet. Some countries are taking longer than others to identify the route and complete their infrastructure works. For example, all works are complete in Switzerland, Germany and Austria while work has progressed significantly in France where significant parts of the works are complete (see table three).

Table 3: The six sections of EuroVelo Route Six

Name of Route Section	Length (km)	Completion (%)	Traffic Free (%)
Loire Valley	400	70	30
Loire Nature	200	10	40
Burgundy River and Banks	250	50	50
Franche-Comté and Upper Alsache	300	20	80
Rhine Route	150	100	10
Bodensee and Upper Danube	200	100	30

Hungary, Slovakia, Serbia and Croatia have already marked out a large part of the routes and are continuing improvement works. In the coming years, Romania and Bulgaria should undertake the work required for making sure that the cycle paths are safe along the River Danube.<sup>42</sup>

### 5.1.1 Benefits

In 2010 the regional tourism boards of the Région Centre and Pays de la Loire in France, with financial support from the French Government, commissioned a study to evaluate the use and economic impact of the Euro Velo in their area.<sup>43</sup>

Over a period of 64 days, 7000 cyclists were surveyed and readings were taken from automatic counters to assess the use of 800 km of La Loire à Veló (which forms part of EuroVelo 6 – Atlantic to the Black Sea) between Cuffly and the Atlantic coast in St. Brevin-les-Pins. The study concluded that 736,000 riders used the route during 2010 contributing €15 million of direct economic benefits.<sup>44</sup>

## 6 Summary

Increasing bicycle use for utilitarian trips is a common objective of many cities and regions around the world with the benefits of cycling in terms of health, the environment and urban mobility well known.<sup>45</sup> However, this has proved difficult in Northern Ireland, particularly outside of Belfast, where cycling is viewed more as a recreation pursuit.

While improving facilities, particularly longer distance rural and inter-urban routes, may not necessarily have a significant effect on congestion or improved urban mobility, it has been shown to be effective at attracting visitors to an area and in encouraging locals to take more exercise.

The cycling tourism market is significant with industry experts predicting further growth in the coming years, fuelled by a rise in domestic tourism, as consumers look for value-for-money.<sup>46</sup> The NITB also hopes to attract cycling tourists from some of its main markets in ROI, GB, mainland Europe and even those farther afield, who may have been alerted to Northern Ireland as a cycling destination, when it hosted the big start of the Giro d'Italia.

The cycling tourism market provides a significant opportunity for Northern Ireland:

- research shows cycle tourists do tend to be relatively affluent;<sup>47</sup>
- They have been found to spend an average €55.00 (£46.20) per day including accommodation (see table 4);
- Over an average trip (7.7 days), they spend €434;
- The market is dominated by day excursionists, however overnight visitors spend four times more per day;

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<sup>43</sup> ECF [online] Studies: Study of the use and economic impact of the interregional route La Loire à Veló [online] available from: <http://nia1.me/21>

<sup>44</sup> Ibid.

<sup>45</sup> Damant-Sirois, G., Grimsrud, M. and El-Geneidy (2013) What's your type: A multidimensional cyclist typology. Conference Proceedings: Transportation Research Board 93th 39 Annual Meeting [online] available from: <http://nia1.me/208>

<sup>46</sup> NITB (2011) Activity Tourism: Sharing Success [online] available from: <http://www.nitb.com/FileHandler.ashx?id=1544>

<sup>47</sup> Fáilte Ireland (2013) Cycling Market Research [online] available from: <http://nia1.me/1z1>

- The development of (circular) cycling trails is vital to attract the large family market and to encourage inexperienced cyclists;
- Long distance linear routes are a significant attractions for serious cyclists;
- Cycling trails are effective at revitalising rural regions, stimulating entrepreneurial activity and creating jobs;
- Cycle tourists are also attracted to urban centres, particularly those with bike sharing schemes.

Table 4: Average day, overnight and trip spend per cycle tourist across case studies examined in this paper

Location	Day Excursion expenditure	Overnight expenditure	Trip (7.7 days) expenditure
Great Western Greenway	£22.40	£41	£315.70
Veloland Schweiz	-	£58	£406
Coast to Coast	£12.71	£46.74	£360
Germany	£13.12	£53.00	£408.10
EU Average	£12.70	£46.75	£360

The various market research reports and case studies presented in this briefing all support the development of cycling tourism. However, it is clear that any future success will be reliant on the meticulous planning and commitment to deliver a high quality project.

From the Northern Ireland perspective a fuller understanding of the current cycling tourist market is required. Surveys carried out in ROI are useful and the findings provide a sound basis from which to develop the cycling tourism product. However, there are different circumstances here in NI. For example, we have an existing National Cycle Network, yet there is no data on how widely this is used by tourists or indeed what tourists like or dislike about it.

The other thing which must be addressed is the routing of the EuroVelo route through Northern Ireland. Both the North and East Coast are notable for their exclusion from this network. This could be significant in the coming years as the EuroVelo is likely, in time, to become synonymous with cycling tourism. This would leave Northern Ireland at a significant disadvantage to other regions that are included on the network.

The GWG in county Mayo stands out as an exemplar of cycling tourism development having seemingly transformed the fortunes of some extremely remote and struggling rural communities. The GWG does have a natural advantage in that it is located in one of the most beautiful areas of Ireland, with views that cannot be replicated. However, the focus should be on the adapting the development model put in place there.