Tourism Bikenomics

How to develop successful cycling routes?

Learning from German experiences

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A successful cycle route needs someone to take care of all important processes.

“A go-to person for the long-distance cycle route”
The route operator ...

is responsible for:

• developing the region
• building and maintaining infrastructure
• mediating between the main POIs
• safeguarding quality
• marketing
• ... and economic success

A route operator is **not** the same as a tour operator selling packages!
Appealing routes

- Beside scenic rivers
- Along former railway lines
- Through varied countryside
- Combined with interesting sights (museums, castles, churches)
Leisurely routes beside scenic rivers

Flat: perfect for beginners and families
Varied: opportunities to stop off for a swim, city tour, castle visit, etc.
Versatile: changing scenery, from the source to the estuary
Eventful: combine with a boat trip, ferry crossing, etc.

Routes beside rivers meet visitors’ expectations!
### Top 10 of 157 cycle routes

<table>
<thead>
<tr>
<th>Rank</th>
<th>Route</th>
<th>% 2017</th>
<th>% 2016</th>
<th>Change</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Elbe Cycle Route</td>
<td>13.6</td>
<td>± 0</td>
<td>0</td>
</tr>
<tr>
<td>2</td>
<td>Weser Cycle Route</td>
<td>7.8</td>
<td>7.8</td>
<td>0</td>
</tr>
<tr>
<td>2</td>
<td>Ruhr Valley Cycle Route</td>
<td>7.8</td>
<td>± 1</td>
<td>1</td>
</tr>
<tr>
<td>3</td>
<td>Rhine Cycle Route</td>
<td>5.8</td>
<td>± 3</td>
<td>3</td>
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<tr>
<td>4</td>
<td>Danube Cycle Route</td>
<td>5.4</td>
<td>± 0</td>
<td>0</td>
</tr>
<tr>
<td>4</td>
<td>Baltic Sea Cycle Route</td>
<td>5.4</td>
<td>± 1</td>
<td>1</td>
</tr>
<tr>
<td>5</td>
<td>Main Cycle Route</td>
<td>4.7</td>
<td>± 3</td>
<td>3</td>
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<tr>
<td>6</td>
<td>Mosel Cycle Route</td>
<td>4.0</td>
<td>± 1</td>
<td>1</td>
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<tr>
<td>7</td>
<td>Lake Constance Cycle Route</td>
<td>3.5</td>
<td>± 2</td>
<td>2</td>
</tr>
<tr>
<td>8</td>
<td>Altmühl Valley Cycle Route</td>
<td>3.0</td>
<td>± 3</td>
<td>3</td>
</tr>
<tr>
<td>9</td>
<td>Lake Constance-Königssee Cycle Route</td>
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<td>± 5</td>
<td>5</td>
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<tr>
<td>10</td>
<td>Oder-Neiße Cycle Route</td>
<td>2.4</td>
<td>± 3</td>
<td>3</td>
</tr>
</tbody>
</table>

* Source: 2017 ADFC-Travelbike Bicycle Travel Analysis: If you think of all your cycling trips in the past three years, which was your favourite long-distance cycle route and bicycle travel region? (n = 2,347)

**Elbe Cycle Route:**
- ranked #1 for the thirteenth time!
- 155,000 cycle tourists per year
- Ø trip duration: 8 days
- Spending: €75/day
- Total turnover: €93 million/year*

* Source: 2014 cyclist survey conducted by Mageburger TV Elbe-Börde-Heide/equipment sales; day cyclists not yet considered
Cycle tourists want ...

• Ø 50–65 km per day
• Tours comprising 4 to 6 stages
• Ø 9 holiday days of which 7 cycling days
• Point-to-point tours with changing accommodation (74%)
• Leisurely rides, pleasant breaks, good wine, cultural highlights
• Good hotels, family-owned, rural style
• Interesting nature, cultural heritage
• QUALITY!
Infrastructure

1. Signposting
   • Uniform, consistent signposting in both directions meeting national standards
   → 79% of cycle tourists use signposting to orientate themselves when on the go

2. Traffic safety
   • Safe cycling
   • Least possible interaction with vehicle traffic
Complementary services

- Rest areas
- Information boards
- Shelters, etc.
- Storage facilities

- Regional product offers
- Involve regional agriculture e.g, farm shops, dairies, farms, etc.

Source all pictures: ADFC
Bett+Bike hosts

1995–2017: increase from 216 to 5,800 cyclist-friendly hosts in Germany
Also in Belgium (40), Denmark (100), Luxembourg (85), Austria (270)
9 regional managers, 120 inspectors

Website relaunch

App
Ruhr Valley Cycle Route

Unique selling point: all businesses along route are certified Bett+Bike hosts

Since 2006:

• currently 120 Bett+Bike partner businesses

• 40% growth in company usage and turnover

Source: Ruhr Tourismus GmbH, 2017
Monitoring

- **Basic research into cycle tourism in Germany**
  German Federal Ministry for Economic Affairs and Energy, 2009

- **ADFC Bicycle Travel Analysis**
  The only long-term national survey on cycle tourism in Germany

- **Cycle traffic analysis**
  Regional cycle traffic studies, information on everyday and leisure traffic
Example: analysis of the Ruhr Valley Cycle Route

Methodology

Counting
Continuous counting of cyclists along the route

Survey
6 survey days, each time in 7 locations

Data linking
Benchmarks: popularity, kilometres cycled, number of cyclists, value creation

Allocation of considerable resources: >€30,000 per analysis

Source: Ruhr Tourismus GmbH, 2017
Summary

✓ Set contact person / central coordination
✓ Appealing product – river as starting point
✓ Good signposting and safety essential
✓ Development of complementary infrastructure
✓ Monitoring – know where we stand
Since 2006:

- 6.5 million cyclists (overnight guests and day visitors)
- €12–14 million in private investments

In 2016:

- 13.9 million gross turnover from cyclists
  (45,800 overnight guests, Ø stay duration: 3.5 days)
- Spending per day: overnight guests €87; day visitors €19
- Regular monitoring

240 km route along the river
through North Rhine-Westphalia, from Sauerland to the Ruhr metropolitan region
Thank you for your attention!

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