Cycling Routes Case Study

The Vennbahn Cycle Route

September 2016
1. CONTEXT

Cycling tourism is becoming a more organised and prominent sector of global travel. It is broadly 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’. Holidays and day trips by cycle are often categorised as a sustainable tourism product.

This review focuses specifically on travel between places by bicycle for leisure purposes. Sustrans, the UK transport charity, sub-divides the market for cycling tourism as follows:

- **Cycling holidays** – cycling duration involves one night or more away from home and 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.

The term can also describe organised rides like RAGBRAI (see above) and destination mountain biking. In summary, in cycling tourism the cycle is an integral part of the tourist experience and the journey is as important as the destination and in some cases it is the destination. It has been described by one cycle route planner as the ‘travelling landscape’.

There is a non-participatory strand in cycling tourism i.e. cycling events which draw a significant number of spectators, participants/support crew and a global media audience. Trophy events include the three-week Grand Tours of France, Italy and Spain. One level down from that are multi-day stage races like the Tour of Britain. Mountain Biking has a separate series of international and national events.

Registered Annual Great Bicycle Ride Across Iowa (RAGBRAI)

RAGBRAI is the longest, largest and oldest bicycle touring event in the world. It started as a casual ride across Iowa in 1973. Now each year, riders come from all around the USA and several foreign countries to ‘experience the sights and sounds, the food and hospitality of the friendly people of Iowa’. The ride is so popular that officials have now limited the number of week-long riders to 8,500 for safety reasons.

In 42 years, RAGBRAI has passed through 780 Iowa towns, spent the night in 125 different overnight towns and with completion of the 25th ride in 1997, has been in all of Iowa’s 99 counties. RAGBRAI is widely covered by newspapers and magazines around the world and benefits from a nationwide broadcast coverage. More than 200 other rides have been established through the years taking inspiration from RAGBRAI.

Source: [http://ragbrai.com/about/ragbrai-history/](http://ragbrai.com/about/ragbrai-history/)
A growing number of route networks are being developed.

Continental and national bike route networks are growing. The UK’s National Cycle Network (co-ordinated by Sustrans) has grown to more than 14,000 miles and saw user trips grow by 7% in 2013. Sustrans plans to see more local networks growing out from the Network routes into towns and cities.

EuroVelo is a network of 15 long distance cycle routes, covering more than 70,000 kms, connecting and uniting the whole European continent involving a wide range of partners. It is envisaged that the network will be substantially complete by 2020. The network is co-ordinated by the European Cyclists Federation (ECF); routes are used by cycling tourists as well as by local people making daily journeys. The ECF described (in interview) cycling tourism as a sector “that is booming” and suggested that cycling has moved from a specialist/enthusiast to a mainstream activity enjoyed informally by many.

The fast-growing US Bicycle Route System (USBRS) now encompasses 11,000 miles in 24 states. More than 40 states are planning, implementing and promoting US Bicycle Routes. When complete, the USBRS will encompass more than 50,000 miles of routes.

Countries and regions are also developing regional bike networks - moderate distance bike route networks tied to a region’s scenic, cultural, and historic assets. This is evidenced in Asia, Australia, and USA and throughout Europe.

Economic impact of cycling tourism is increasing.

A study on EuroVelo commissioned by the European Parliament in 2012 estimated that over 2.2 billion cycling tourism trips, including 20 million over-night cycle trips are made every year on the network. Cycle tourism had an estimated economic impact of €44 billion. The report concludes “There appears to be a strong cycling tourism appeal in countries where every day cycling is high such as in Denmark, Germany and The Netherlands.”

Since this study, many destinations have started estimating the tourism impact of cycling tourism. For example, in the UK, leisure and tourism cycling on the National Cycle Network supports over 15,000 jobs and directly contributes £650 million to the economy each year, based on a conservative estimate of a daily spend of £7 p.p. per day. The value of cycling tourism in Scotland alone was estimated to be £117–239 million per year in a 2013 report.

In 2014, the USA based Adventure Travel Trade Association (ATTA) released the first global Bicycle Tourism Survey of nearly 300 bike tour operators. The report demonstrated that the sector is becoming more organised and prominent in global travel and suggests an upward trend of interest: 59% of respondents say their profit outlook for 2014 was up from 2013.

Mountain Biking is a maturing market in the UK. Developing Mountain Biking in Scotland (DMBiS) report that growth in use of purpose built trail centres has reduced to small single figures and that stronger growth is now apparent at the more adventurous end of the market, facilitated by permissive land access in Scotland.
**Cycling Tour Operator: Saddle Skedaddle**

Saddle Skedaddle started in 1995 and claims to be the largest independent cycling holiday specialists in the UK, offering UK and overseas holidays for all types of cyclists. They partner with HF Holidays and Sustrans as appropriate.

Based in Newcastle-upon-Tyne, the Coast to Coast cycle route from Whitehaven to Tynemouth - the busiest in the UK - passes their office and they can measure the growth in users from throughputs in their café. Founder Andrew Straw observes that the market has been increasing for some years helped by the Tour de France and Team GB success in the Olympics. He feels that the increase in cycle commuting has equipped and inspired people to use their bike for leisure. They arrange trips for around 4,500 cyclists p.a., of whom around 1/3rd are in the UK where the average duration is 4-5 days – an extended week-end. They use a range of accommodation, mostly small-scale.

Innovation is evident in the rental of e-bikes (electric cycles), which are really popular in Europe and now taking off in the UK. These make a long distance route achievable for a middle standard cyclist and remove the fear factor. Skedaddle are using GPS guidance but “it’s no substitute for a good OS map”. Andrew comments that Sustrans routes are well mapped. Development of an App for Saddle Skedaddle tours is on the horizon, and they see the opportunities to promote activities and points of interest near the cycle route.

[www.skedaddle.co.uk/](http://www.skedaddle.co.uk/)

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**Cycling Tour Operator: Wilderness Scotland**

Wilderness Scotland is an Adventure Travel Company established in 2001 ‘specialising in offering an inspiring range of holidays, journeys and wilderness experiences in the most remote and beautiful regions of the Highlands and Islands of Scotland’. The experiences offered are creative tours and itineraries including road cycling, mountain biking, walking, sailing, wildlife, sea kayaking and photography holidays. They provide an excellent website with an online search facility to choose your ‘perfect adventure’ by activity, date, region, difficult grade and comfort grade. Videos and trip dossier to download as a PDF are provided. They make an extensive use of social media and feature trip reviews by past customer, to help in the decision making process, then provide online booking facility and excellent customer care (with chat, call or email). There is very good support at all stages of the customer purchasing cycle.

[Source: www.wildernessscotland.com/](http://www.wildernessscotland.com/).
2. THE VENNBAHN CYCLE ROUTE

1. Overview

- What is the Vennbahn?

The Vennbahn Cycle Route is Europe’s longest disused railway cycle path, specifically developed as a tourism product exploiting the rail bed and associated infrastructure of tunnels and bridges, the region’s scenic beauty and its cultural heritage. The cycle trail stretches 125km from Aachen in Germany, through east Belgium ending in Luxembourg. Extensive regional cycle networks (Vennbahn Plus) are available with lengths between 30 and 50km and of different degrees of difficulty, passing through unique landscapes and culture.

- Key factors

In developing the route, four key elements were regarded as keys to success: the natural environment, infrastructure, services, and marketing.

A well-defined brand mark has been developed and is core to all marketing and signage activities throughout the length of the Vennbahn. It is highly visible on all online and offline collateral and on associated infrastructure, including bicycles available for hire.

- Budget and sources of funds

An EU-Feder Interreg project was drawn up to share the financial development between multiple partners; total investment currently stands at a total budget of about EUR14.5m.
2. **History, development and performance**

- **Project history**

The Vennbahn was a 19th-century railway built to transport coal from Aachen to Luxembourg; in 1990, after commercial rail traffic had been discontinued, the German-speaking Community of Belgium (DG) purchased the section between Raeren and Bütgenbach to operate it as a passenger service tourist attraction which proved non-viable. A search began for a new use involving effective partnership, which eventually proved fruitful in Wallonia where disused railways were already being converted into a popular network of rapid cycle routes known as RAVeL. The added value for tourism has been derived by creating a North-South axis using the Vennbahn, supported by extensive regional networks of greenways – some being cross-border – thus amplifying the benefit to surrounding areas from the initial investment. In Aachen, for example, the Vennbahn joins with the German D4 cycle route and there are east-west connections at other key points. Finally, there is a short train ride from the end at Trois-Vierges providing connectivity to the city of Luxembourg.

The Vennbahn Cycle Route is an inter-regional project formally coordinated by the German-speaking Community of Belgium (DG). It comprises 12 partners: local authorities and regional partners in Belgium, Germany and Luxembourg plus the EU-Feder Interreg. The partners are a mix of roads departments and economic development agencies. The total investment for the project currently stands at about EUR14.5m.

All central marketing is undertaken by Tourismusagentur Ostbelgien (Tourism Agency for east Belgium) and the route officially opened in 2013.

- **Project ambitions – what was it expected to deliver?**

The primary objective underlying the development of the Vennbahn Cycle Route was the promotion of rural development, active tourism and local employment.

**More specifically, the ambition was to:**

- Increase awareness of the region as a cycling destination (despite some of the upland region characteristics)
- Increase visitor numbers
- Increase occupancy rate in hotels and other accommodation products
- Increase the number of cycling packages sold.
The route was viewed as a holistic concept from the outset and a range of outputs were planned in addition to the construction of the physical “greenway” itself, including:

- Branding and online and offline marketing
- Storytelling
- Signage and information exhibits designed to meet the needs of tourists
- Infrastructural projects (cycle bridge, picnic areas and shelters, safe-road crossings, illuminated tunnels, reusing heritage infrastructure where possible
- ‘Complementary infrastructure’ (480 km of nearby mountain bike paths, three bike parks etc.)
- Complementary services: a cross-border network of e-bike hire stations – 150 e-bikes available in 2013, the development of bed+bike accommodation, bike shuttle, innovative cuisine options
- Audio tours to interpret the unique cultural and natural heritage
- Packaging through the East Belgium Tourist Agency.

The marketing actions include:

- Vennbahn Website

  www.vennbahn.eu/en/ provides everything needed to plan a tour from a self-building trip planning perspective (i.e. maps with details on each stage including elevation profile, description, and GPS details). All-inclusive packages are also featured covering luggage transfer, overnight accommodation and board.

There is no online booking via the site but visitors are directed to travel agents and operators for bookings, some of whom have online booking facilities.
A Vennbahn app, developed in April 2016, provides useful information such as routes, signs, rest stops, track topography, attractions and quality lodging. The app can also be used offline. Promotion has only recently started and it is too early to judge its success. Content was based on that prepared for the website and the addition of the GPS facility allows useful functionality such as estimating time and distance to chosen stopping points.

Vennbahn app available in the App Store and Google Play

- A ‘Vennbahn Plus’ tour planner – a box of maps and detailed information on all the associated attractions for the 16 regional connection routes available to buy at the price of EUR12.50.

- Vennbahn map – a useful brochure, which includes a 1:100,000 scale route map and contains a wealth of useful information on and around the Vennbahn, such as connections, branch lines, links to other thematic cycle routes and much more.

- Information boards – with detailed maps and local information

- Clear and consistent signage along the entire route
- **Storytelling** – Unusually, the Vennbahn has also made storytelling a core element of the visitor experience. The history of each section is portrayed through the use of customised comic illustrations, which provide user-friendly background on the heritage role of the Vennbahn railway since the Prussian era, and local history including the region’s strategic role in two world wars.

  - Complementary products are now being developed that includes audio tours and a new Vennbahn film “Vennbahn – A Path of Transmission” which won the ‘Golden City Gate 2015’ prize at ITB for the category of TV commercials. This film was developed in partnership with the East Belgium Tourism Agency and presents ‘an emotionally charged and visually intense view of the former railway’s history and its modern destiny as a cycle route, criss-crossing three frontiers – a tale of transmitting something of value from one generation to another’

- **Measurement of success**

  In order to measure success, the following key metrics are used:

  - ✔ Recording of cycle trips (5 measuring points along the route),
  - ✔ Feedback from the different stakeholders,
  - ✔ Feedback from specialized press and organisations,
  - ✔ Occupancy rate at accommodation providers.
- **Project results and achievements**
  - The official inauguration was in 2013 and more than 200,000 cycle trips were recorded in the 2014 peak season between June and October 2014.
  - In 2015, the overall number of recorded cycle trips was 354,300.
  - Occupancy rate in the region has increased by up to 20%.
  - The Vennbahn Cycle Route has won international recognition and a series of awards in 2013, 2014 and 2015.
  - The key markets by size are effectively domestic: Flanders (i.e. northern Belgium), the Netherlands and Germany. Netherlands is not a truly home market, but borders are highly porous in that region.
  - The number of Tourismusagentur Ostbelgien’s (T.O.) operated cycling packages sold between 2013 and 2015 almost tripled and there are currently active tour operators using the route in Belgium, The Netherlands and Austria. TO has seeded the market by developing and selling consumer packages.
  - The Vennbahn distribution strategy is currently to create awareness and interest in the route mainly through direct rather than indirect channels. However, packaging is part of the strategy, and to ensure this was available from the start, T.O. offers three bookable small group tours with scheduled departures. They cannot be booked online.

A fourth tour is featured on the Vennbahn website, operated by a Dutch cycling tour operator which starts their tour in Maastricht, some 30kms west of Aachen. T.O. does promote to the travel trade as part of their destination trade marketing activity e.g. they attend trade fairs in the Netherlands being a key market, but is not pushing the Vennbahn hard at this channel as they believe there will be a natural pick-up as visibility increases.

- **Prospects and projections**
  - Vennbahn projects a further increase in visitor numbers in the future due to existing or imminent connections to other cycle paths in the vicinity of the Vennbahn providing a “feeder” pipeline.

- **Cross-border collaboration**
  - The EU funding term is now complete; Tourismusagentur Ostbelgien has retained the overall marketing responsibility as much of the Vennbahn is in their region and impacts are significant locally. Other partner countries are marketing their sections, and the overall partnership is looking for a solution for long-term funding of the shared marketing overhead.
  - In general, effective partnership working was secured due to willing partners sharing a readily identifiable common purpose.
Cycle tourism apps

The increasing ownership of smartphones and the obvious need for maps when cycling on new routes has resulted in the development of a vast number of cycling apps. These allow users to easily track and record rides, navigate and plan routes, keep on top of training and the more tourism oriented apps also provide information on points of interest, accommodation and services along the way.

At simplest, many people already have one: Google maps. Cycling routes have been offered for some time, and it can provide the prized turn-by-turn navigation instructions if required.

Since launching in 2009, Strava has become the “go-to” app for all cycle rides. It provides distance, speed and other metrics, but the stand-out features are: the use of “segments” allowing comparison with others who have cycled the same road, and the social functionality that allows registered users to follow the weekly progress of cycling friends, join clubs and take part in challenges. There could be ways of integrating some of these features into the apps for long distance routes.

Key features for serious cycle touring include: cycle route overlays, turn-by-turn directions, contour lines and hill shading, GPS coordinate mapping and GPX, and point-of-interest searching for accommodation, cafes, cycling shops and public transport nodes. To minimise content development, some apps point to the offline Wikipedia articles based on geo-location. When seeing an interesting monument, this provides the ability to easily pull-up the Wiki article without an Internet connection.

At a national level, VisitDenmark considers itself the “ultimate destination for cycle holidays” and has launched a new BIKE & STAY App which works offline and gives access to route maps, recommended experiences and campsites along the 26 Panorama cycle routes through Denmark. The cycle routes are short scenic tours, tailored to daytrips through Denmark’s countryside. The app was developed by VisitDenmark and Everplaces, as part of the EU-project ‘Powered by cycling: Panorama’ which aims to bring together new biking routes, better infrastructure and bike-friendly accommodation with international marketing to make Denmark a world-class biking destination and to generate growth in coastal tourism.

The Vendée Vélo app – gives access to detailed information on all 70 cycling paths in the Vendée department in western France, practical information and lists nearby tourist sites. It can be downloaded by all type of smartphone by scanning the QR code featured on the cycling path road signs – an unusual but effective idea.

Some other apps with “smart” features include:

- Cycle Ireland App – the app includes 100 of the most scenic routes in the country passing many of Ireland’s top attractions and covering almost 7000kms. The app includes photos, videos and route descriptions than can be viewed on both the Cycleireland.ie website and the App.

- Cycling the Alps app – the app provides details of many of the cycling passes in the Alps. This app allows users to see the complete pass from a bird’s eye view with Google Earth Tour.

A word of caution: the National Cycle network app - the free app, developed by the travel charity Sustrans, detailed more than 25,000 miles of British cycling and walking routes. However, they have withdrawn the app due to the high cost of updating the content.
Loire à Vélo

The ‘Loire à Vélo’ initiative is an interregional cycle route which crosses two regions: Centre-Val de Loire and Pays de la Loire. The idea of this route originated in 1995 by the two regions and has now become a genuine tourist destination in its own right, associating the Loire Valley’s human, cultural, gastronomic and winemaking heritage. It is managed by the area’s regional official tourist organisations which work in partnership: the Loire Valley Tourist Board (CRT Centre-Val de Loire) and the Société Publique Régionale des Pays de la Loire. They brought together the 6 departments crossed by the route as well as its major cities. They work with fifteen partners which are active daily to make this project a reality. La Loire à Vélo is a registered trademark, with 578 professionals and collaborators bearing the name ‘La Loire à Vélo’.

It is France’s **first fully signposted cycle route** covering over 800 km of riverside scenery through the Loire Valley, a UNESCO World Heritage site. Most of the stages are no more than 40km long, representing a maximum of 4 hours of cycling a day, which can be broken down to suit the cyclists’ ability. It took the partners over ten years to create, signpost and secure this unique cycle route. The first section between Angers and Tours was opened in 2005. The ‘Loire à Vélo’ now also joins up with other cycle routes. It is also well connected with the SNCF with the Interloire-trains.

The cycle route is accompanied by a practical instruction manual and the [www.cycling-loire.com](http://www.cycling-loire.com) interactive website allows cyclists to plan and tailor-make a trip, offering maps of the stages, destinations, accommodation, breakdown services and good deals. A smart phone app “La Loire à Vélo” was launched in 2013 to allow cyclists to navigate in real time and keep the travel itinerary to hand. It also shows points of interest, offers various “challenges” to encourage Social Media engagement and a travel log.

**Investments:** over EUR 50 million.  
**Direct economic benefits:** EUR 19.8 million.  
**Visitors:** over 900,000 tourists cycle along the route every year. It attracts cyclists from all over Europe as well as Canada, the USA and even Australia.
3. Key learnings

SUCCESS FACTORS - VENNBAHN

✓ **A Wide-ranging Partnership Approach**
  Vennbahn was planned by a partnership that shared and bought in to a common objective. They planned for, and delivered an end-to-end project holistically despite the challenges of operating across borders.

✓ **Effective branding and digital platforms**
  The distinctive yellow branding has been widely used along the length of the Vennbahn, adopted by a variety of service providers to create brand awareness and quality assurance. While the website and Social Media platforms would not be described as cutting-edge in tourism terms, they are effective and creative.

✓ **Access to natural and cultural heritage assets**
  Vennbahn provides an opportunity to explore outstanding natural assets (the route passes through the High Fens/Eifel cross-border Nature Park, as well as cultural assets.

✓ **Quality of the cycling infrastructure**
  A well maintained, high standard of surface and traffic-free cycle paths. Safe tunnels and bridges. Resting places and picnic stops with views.

✓ **Clear directional signage**
  Everyone hates getting lost.

✓ **Supportive public transport**
  Public transport provision must be targeted to the specific needs of the cycle user.

✓ **Quality Standards**
  Setting and adhering to quality standards for the visitor and hospitality services along the route. The bed and bike certification has been successful.
**SUCCESS FACTORS – EUROVELO**

ECF state similar characteristics for their success in Europe, which in summary they put down to investment in:

- Public transport connectivity
- Attractive routes with clear themes and USP, well signed
- Comfortable routes – good, smooth surface, reasonably flat
- Greenways or low traffic public roads
- Ensuring the provision of cycling friendly services
- Marketing, promotion. Up-to-date and easily accessible information and promotional tools.
- Good organisational support from trade bodies and agencies.
- Monitoring, evaluation - Usage monitoring and Impact assessment.

**Which aspects did not go as anticipated?**

- There is still much work to be done on improving public transport access. Despite the existing train stations at the start and end point, Vennbahn suffers from a lack of bus connections for the day visitors who are not riding the entire route.

**What are the implications for the projects delivered through the Discover England Find?**

- Given the importance of Europe as a market for cycling tourism and as a source market for England, together with the trends identified in this case study, the potential market for cycling tourism products in England appears considerable.
- Cycle paths should be routed through areas that are scenically attractive and/or have heritage and cultural assets maintain the interest of cyclists, especially the mainstream sightseeing cyclists, rather than enthusiast markets.
- Cycling routes need not be completely traffic-free, but where they use public roads, these should have low traffic volumes and significant stretches should be purposely designed for cycling.
- E-bikes are increasingly in demand and give confidence to less experienced cyclists, allowing them to tackle longer or more demanding routes.
- Cycling tourism is not a sector that has adopted technology or “bookability” tools as yet, despite the frequent use of social media and apps such as Strava by the enthusiastic cycling community.
• Cycling tourism can be an effective way of developing rural tourism products. The national cycle network co-ordinated by Sustrans already offers 10-12 “challenge routes” that are planned with cycling tourism in mind. However, Sustrans readily admits that its role is in developing and joining up cycle paths, and not in tourism related interventions or promotions.

• It is important to provide a network of regional, feeder routes ideally with a different look and feel to provide variety, widen the market and give visitors reasons to return to the main path.

• To respond to climate change, there is clearly a need to develop new low impact, low carbon products of this type to provide for sustainable tourism and to encourage existing and new markets to switch from resource intensive and polluting forms of tourism. In the areas traversed by the Vennbahn, the philosophy of slow tourism in natural surroundings, relatively free of traffic is firmly embedded in the local psyche.

• Apps are favoured by some long distance cycle routes, but not all. La Loire a Velo has continued to update and develop their app since its launch in 2013 and it is promoted with a QR code from their home page. Vennbahn has recently launched one; conversely Sustrans have dropped their App as the costs of keeping it up to date were too high. Plans and costs for developing an App must include a strategy and budget for their ongoing development, and must be deliberately marketed. Increasingly, responsive websites offer a lower cost alternative that have improving functionality and are easier to update by non-specialists.

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1 Definition by Sustrans, the UK charity promoting sustainable transport featured in the European Cyclists’ Federation (ECF) website, ‘Cycling tourism’ at https://ecf.com/what-we-do/cycling-tourism.


9 The Scottish Tourism Alliance, ‘Cycle Tourism’ at [http://scottishtourismalliance.co.uk/nature-heritage-activities/cycle-tourism/](http://scottishtourismalliance.co.uk/nature-heritage-activities/cycle-tourism/).