



## Knowledge transfer project: **Cycling tourism**

**Cycling tourism in USA, Denmark, Germany, the Netherlands,  
Sweden, and their perceptions of Norway as a cycling  
destination**

**Oslo, august 2016**

**This knowledge transfer project is a co-operation between Innovation Norway and NCE Tourism. In order to develop high quality market related bike tourism products, it is important to have updated market knowledge. This project was conducted by Innovation Norway's offices in Germany, Denmark, Holland, USA and Sweden during summer 2016.**

**The goal of the survey was to get a better understanding of cycling as a special interest segment within these markets. The main focus is on tour cycling with or without a guide. The knowledge gathered in this project will help us in regards of product development, packaging and distribution, and to achieve more effective marketing towards this segment.**

## Key findings:

- Demand for cycling tourism has increased over the last year
- E-bikes very important and open up for a bigger target group
- Sustainable and environmentally certified companies are attractive to many tour operators, however, many tour operators do not experience special demand for sustainable products.
- High willingness to pay for luggage transport and good, local food
- Tour operators want partners that “go the extra mile” and support when necessary

## Important aspects of a good cycling destination

- Roads with good signage
- Routes with variation and good description of places to stop, things to do along the route and places to eat
- Good cycling infrastructure and well developed cycle paths
- Safe bike parking, drying racks for wet clothes
- Options for sightseeing and cultural experiences
- Good maps
- High quality rental bikes, also e-bikes
- Local food and drinks
- Luggage transport between destinations/accommodation
- Good, medium to high quality accommodation with en-suite bath rooms and breakfast included
- Good cooperation and teamwork between tour operators and companies on-site
- Free Wi-Fi
- Both base- and round trips must be available

## Bike tourists in general

- Travel on bike holidays abroad once a year
- Are age 35-40+
- Many make single bookings, but travel in a group. Travelling with partner and / or friends is common.
- Many hire high quality bikes on site, especially on group trips, but for sporty road trips and MTB many seem to bring their own bike
- Require luggage transportation
- Cycle day stages of 40-60 km (DK)
- Don't get inspired by races like Arctic Race of Norway
- Use internet as main source of information, but classical bicycle maps, signposts and GPS are still very important
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## **Challenges**

- Short season
- Risk of bad weather
- High cost of living
- Long arrivals
- Roads with low traffic and dedicated bike lanes
- Lack of knowledge of Norway as a destination for cycling

Lack of knowledge of available products

- Local companies and their willingness to give provision and work with international tour operators
- Perceived as rough and demanding
- Level of service
- Facilities for cycling tourism
- More bookable products

## **Opportunities**

- Safe political situation
- Lack of knowledge of Norway as a destination for cycling
- E-bikes open up bike tourism to a larger market of less trained bike tourists
- Beautiful Stunning nature
- Create different routes at different levels
- Create great cycling facilities on destinations
- Different target groups, different needs.
- Create a wide range of new products, package them and make them accessible
- Less known

## Table of contents:

Page 6	Cycling tourism in the Netherlands
Page 17	Cycling tourism potential in Denmark
Page 24	Cycling tourism potential in Germany
Page 30	Cycling tourism potential in Sweden
Page 41	Cycling tourism potential in USA



*Cycling in Balestrand.  
Photo by CH/Visitnorway.com*

# Cycling tourism potential the Netherlands

## 1. Executive summary

In May, June and July 2016 a market research about cycling tourism was conducted by Innovation Norway and NCE Tourism - Fjord Norway. The goal of the research was to get a better understanding of cycling as a special interest segment within 5 selected markets; the Netherlands, Germany, Denmark, United States and Sweden. The main focus is on tour cycling ('soft-biking'), with or without a guide and both base cycling and round trips. With the gathered knowledge, Innovation Norway aims to do more effective marketing towards this segment and to share relevant knowledge and recommendations with the Norwegian industry, for example in regards to product development, packaging and distribution.

Cycling is popular in the Netherlands, not only as a mode of transport but also as a leisure activity, and therefore a big potential market for upcoming cycling destinations such as Norway. Through the project, we got valuable insight in tour operators that offer cycling tours on the Dutch market and what characterizes the target group. Also, we mapped the media landscape within this special interest segment, both online and offline. This has resulted in a deeper understanding of what characterizes a good tour cycling destination, trends, and demands of the target group.

Norway has definitely potential to become a known tour cycling destination, but it still needs to develop. Especially when it comes to this soft biking segment there are concrete recommendations that can be concluded from the research. These are formed around what seems to be the main challenge for tour operators, lack of knowledge about the destination and knowledge and availability of products:

- Good information available about destinations and products.
- Need for complete packages that include both cycling specific and non-cycling specific elements. Cooperation with Norwegian companies is necessary.
- Further define target groups to be able to respond to the different demands of these target groups.

## 2. Introduction

Cycling is part of the daily life in the Netherlands. With 19 million bicycles the Netherlands has the highest bike-density in the world. The Dutch see cycling as a comfortable and reliable way of transport: 84% has a positive opinion about cycling. Of all regular cyclists, 95% has a positive attitude towards cycling and even among the non-cyclists more than 50% consider cycling as positive<sup>1</sup>. Cycling means peace, no irritations, being on your own, no delays, always on time and cheap. Also independency and flexibility are mentioned as important advantages.

Cycling is not only popular as a transport mode; it's also a popular leisure activity for 52% of the

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<sup>1</sup> Source: CBS/NBTC-NIPO (2015). Trendrapport recreatie, toerisme en vrije tijd.  
<http://download.cbs.nl/pdf/trendrapport-toerisme-recreatie-en-vrije-tijd-2015.pdf>

population, with more than 197 million day trips per year (> 1 hour) in 2013<sup>2</sup>. In 2014, 1,5 million Dutch went for a cycling holiday according to research from NBTC-NIPO<sup>3</sup>, of which 1,3 within the Netherlands. 300.000 people went on a cycling holiday abroad<sup>4</sup>. The cyclists went on more than 2,1 million cycling holidays, divided over 450,000 trekking holidays and 1,6 million from one base. In the Netherlands, cycling as an activity is part of 3,9 million holidays (of in total 14 million holidays). 28% of this is considered as a cycling holiday where more than half of the days are spent on cycling. The Dutch cycling tourist is typically between 30 and 49 years old, traveling with two persons and belonging to the higher social class.

Furthermore, theme based holidays are becoming more and more popular, according to research from NBTC-NIPO<sup>5</sup> in 2015. Cultural, hiking and cycling holidays are the most popular. The potential market is big: 1,1 million Dutch are planning a cycling holiday in the next 3 years, this is 8% of the total population. 640.000 Dutch went on a cycling holiday in the past three years (5%). Numbers and deeper insight regarding cycling holidays abroad are unfortunately not available. According to NBTC-NIPO this is because cyclists usually travel to their destination by car, bus, train, plane etc and are therefore not defined as cycling tourists.

The development of E-bikes should be mentioned as well. Sales have increased a lot in the previous years, from 2% market share in 2009 to 28% in 2015<sup>6</sup>. It is expected that this will only increase further.

### 3. Methodology

Phase 1 consisted of online desktop research among tour operators and media, where 27 tour operators from the Netherlands (and one from Belgium) were listed. In the overview of the media landscape 23 magazines and websites were listed, both online and offline. Also, the desktop research covered three cycling related umbrella organizations in the Netherlands.

In Phase 2 five tour operators were selected for an in-depth telephone interview. These results were then summarized in a conclusion and translated into a set of recommendations for destinations and companies in Norway. Furthermore, relevant statistics have been analyzed to be able to give an introduction to the Netherlands as a potential target market for cycling tourism in Norway.

## 4. Research part 1: Desktop research

### Tour operators

In total, 27 relevant tour operators offering cycling products were identified. Both bigger tour operators with a wide product range including cycling products, as well as specialized tour operators only offering cycling products.

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<sup>2</sup> Source: Ministry of Infrastructure & Environment (2013). Fietscijfers Nederland. [http://www.fietsersbond.nl/de-feiten/fietsen-cijfers#.V5tLT\\_mLSUk](http://www.fietsersbond.nl/de-feiten/fietsen-cijfers#.V5tLT_mLSUk)

<sup>3</sup> Source: NBTC-NIPO (2015). De fietsvakantie in Nederland. <http://www.nbtcniporesearch.nl/nl/home/wat-er-speelt/de-fietsvakantie-in-nederland.htm>

<sup>4</sup> Source: NBTC-NIPO (2015). De fietsvakantie in Nederland. <http://www.fiets.nl/2015/02/11/anderhalf-miljoen-nederlanders-op-fietsvakantie/>

<sup>5</sup> Source: NBTC-NIPO (2015). Themavakanties populair onder Nederlanders.

<http://www.nbtcniporesearch.nl/nl/home/wat-er-speelt/themavakanties-populair-onder-nederlanders.htm>

<sup>6</sup> Source: RAI Vereniging (2015). Brancheanalyse fietsen.

<https://www.raivereniging.nl/artikel/marktinformatie/branche-analyses/brancheanalyse-fietsen.html>

Based on phase one and looking at tour operator products three target groups can be identified:

- Tourists who want to experience a destination in a more active way. Not necessarily experienced cyclists, but with a relatively active lifestyle. Cycling might not be the main goal, but being active might be a sub goal. This target group would consider an e-bike.
- Active tourists and families, specifically looking for an active holiday. Also interested in other activities, but the cycling tour is the main part of the holiday and also seen as a challenge.
- Sportive cyclists with cycling/training as the main focus. This target group is looking for challenging routes and destinations. Cycling possibilities are the most important when choosing a destination. Road cyclists and mountain bikers are included here.

The bigger tour operators mainly focus on tour cycling, while the specialized tour operators also offer more adventurous or physically demanding tours. Most tour operators sell both individual tours and group tours, often also tailor made on request. Some also offer single tours. Summer is the main season for all tour operators, for some tour operators offering road cycling products in for example the Mediterranean countries the season starts earlier, in February, March or April.

All tour operators make visible on their website how demanding the tours are (in general divided into 'easy', 'moderate' and 'hard'). This makes it possible for the consumer to identify which tours are suitable. Most tour operators also explain how these categories should be understood. Some tour operators offer thematic tours, this seems to appear mostly in connection to 'soft-biking' products. Culture, food/wine, history are examples. Tours for sportive cyclists could be seen as a theme in itself (road cycling/mountain bike).

Most tour operators do not mention working sustainable specifically, but cycling is sometimes mentioned as a sustainable way of transport/going on holiday on their websites. Prices are mentioned on all websites, and all tour operators offer online booking (or at least the possibility to request an offer). Ordering brochures is possible on some websites, in most cases this has to be done via email.

Standard products in general include accommodation, luggage transport, routes and sometimes guides. Breakfast is normally included; dinner might be included as well. Often elements such as flights, dinner, rental bikes or other activities can be added to the standard product. On request, tailor made products can be put together.

When it comes to destinations, focus is mainly on Europe with a wide range of countries offered. Some specialized tour operators offer destinations outside Europe, these products are considered as very niche. This wide range of destination is an interesting fact, while at the same time Norway is only offered by 3 tour operators with only 1 product each. Since offering a variety of destinations doesn't seem to be a problem for most tour operators, it will be interesting to find out more about their reasons for not including Norway (yet) in the in-depth interviews.



## Magazines and websites

There is a wide range of cycling related magazines in The Netherlands, most of them with a specific focus on road cycling or mountain biking. The media landscape for soft biking is quite limited with a main focus on the Netherlands and neighboring countries.

Mountain bike magazines such as Up/Down magazine, Bikefreak magazine and Mountainbike Plus are known media among mountain bikers in the Netherlands. These magazines focus on products, test, biking destinations and a small news section. Then there are the road cycling magazines like Wieler Revue, ProCycling and Fiets with a main focus on news, interviews, products and tests. The Belgium magazines CycleLive and Grinta focus more on the (road) cycling enthusiast/tourist and have more attention for travel stories and destinations. Bike & Trekking is the magazine with the broadest focus, both road, mountainbike and trekking. They have a lot of travel content as well and from experience good possibilities for advertising. Worth mentioning is also Pedala, a cycling magazine specifically created by and for women.

Most of the magazines have some content online, but you have to buy the magazine to read all the content. All magazines offer print advertising and some online advertising, but the online possibilities are often quite limited. The magazines are often part of a bigger publishing company that has several special interest magazines in its portfolio. Looking at the list, we can say the opportunities for tour cycling content are limited at the moment.

Apart from the magazines there are 6 online biking portals/websites, most of them focusing on mountain biking. The portals are mainly used for news updates regarding races and products/tests, not much travel content is published on these portals yet. Sometimes a forum is connected. These portals are often developed and updated by enthusiasts, who do not earn a living out of this. This also means that cooperation possibilities might be limited here, but it will be interesting to follow the developments of these portals and the online cycling community. For tour cycling these kind of communities do not seem to exist yet.

## Cycling federations and organizations

The KNWU is the official cycling federation in The Netherlands, and member of the UCI, the international cycling federation. KNWU is the official federation for racing and competitions and most cycling clubs are a member. In total, the KNWU has around 27.500 members. The NTFU is the Dutch tour cycling federation. This organization has as a goal to develop sportive tour cycling (recreational road cycling and mountain biking) in The Netherlands. Many clubs are a member of both KNWU and NTFU. NTFU plays an important role in the so called 'toertochten', tour rides on- and off-road open for everyone against a small fee. NTFU provides rules, guidelines and assistance for organizing clubs, and has a very extensive calendar online which is by far the most visited page on their website and probably one of the most visited pages among cycling related pages in general. NTFU has around 60.000 members. Both federations publish their own magazine 6x a year.

Fietsersbond is the cycling advocacy organization in the Netherlands and very active in politics. Their main goal is to improve cycling facilities in The Netherlands, both for daily traffic and tourists. The Fietsersbond does not have an international focus and is a non-profit organization. The union publishes an own magazine, but with focus on the Netherlands.

ANWB, the official roadside assistance organization, also has a focus on travel and is owner of 7 tour operators. Among other specials, they publish a yearly cycling special with destinations in- and outside Europe which is also a good opportunity for promoting Norway as a tour cycling destination.

## Cycling stores

A relevant development worth mentioning is the development of cycling stores. Cycling stores have expanded into specialist' stores and web shops have grown extensively in the past few years. Especially among road cyclists and mountain bikers who prefer to prepare their bikes themselves these are very popular (for example for ordering spare parts, gear and clothing). The two biggest players in the market Mantel and Futurumshop (both have a physical store and a big webshop) started publishing their own magazines with a mix of interviews, stories, tests, training tips and product news. These magazines might give new opportunities for media activities.



*Road cycling at Isfjorden.  
Photo by Mattias Fredriksson/visitnorway.com*

## **5. Research phase 2: In-depth interviews**

Phase 2 of the research focuses on in-depth interviews with 5 selected tour operators offering cycling products in The Netherlands. One of them is currently offering Norway, one is considering this and the other three are currently not planning to start offering products to Norway. Most of the tour operators focus on soft biking/tour cycling, two of them also offer mountain bike and road cycling products in addition.

### **5.1 Demand for cycling products**

An increase of the demand for cycling products was mentioned by all five respondents. When it comes to the cycling products itself, it's both cycling specific demands and non-cycling specific demands. In case of cycling specific demands routes, information and luggage transport are considered most important. The not cycling specific demands are connected to accommodation and food. In case of bike rental it's important that the quality is of good standard, but many prefer to bring their own bike if possible.

### **5.2 E-bikes**

More and more people own an e-bike and sales have increased the past few years. The tour operators expect that the increase of e-bikes will be a future driver for the demand in cycling tourism, and might create new opportunities. E-bikes make a cycling tour or holiday accessible for a broader target group. It gives some extra 'confidence' to those who are less trained/used to cycling, and can be a solution in case of different levels in a group. So far, the demand is mainly seen for soft-biking products but also e-mountain bikes are becoming available more easily. All of the tour operators see this as an opportunity for Norway, to make the -for many tourists- relatively rough terrain more accessible.

### **5.3 Other activities during a cycling holiday**

Cycling is the main activity when booking a cycling holiday, according to all tour operators. In general there's also some interest for hiking, cultural activities and food, but only when the program allows time for this. In some cases other activities are already implemented in the program, tour operators advise to book these when clients ask for extra activities.

### **5.4 Accommodation**

Cycling tourists appreciate good middle-class hotels with a good breakfast. One of the tour operators also mentioned camping, but only for the more adventurous products. This tour operator also offers products where only the first and last night are booked and the tourist can decide himself how he wants to spend the nights in between.

### **5.5 Local food and sustainability**

Local food is seen as a welcome addition to a cycling holiday, something tourists look forward to after a day on the bike. They have the feeling they deserve good food and need to recover. Most important is that it's tasteful, well prepared, ecological and locally produced and preferably homemade. Breakfast is also an important requirement when choosing accommodation. Sustainability is not specifically asked for, the tour operators say. Probably because cycling itself is already seen as a sustainable way of traveling, as one of the tour operators mentioned.

### **5.7 Willingness to pay for services**

Luggage transport and food are the services tourists are most willing to pay for. People ask about these aspects specifically before they book and these can be considered as one of the prevailing aspects. Good accommodation comes closely after that. Good quality of rental bikes is very important, but most people prefer bringing their own bike if possible. Interesting is that two of the tour operators mention Wi-Fi as a service tourists want to pay for, while three mention that Wi-Fi is very important but at the same time nowadays more or less considered as a public good where accommodations shouldn't ask a fee for. Because of this, many guests are not willing to pay for Wi-Fi anymore. These tour operators say they prefer selling accommodations that include free Wi-Fi. This development is probably not specific for cycling tourism.

### **5.9 Booking behavior**

Bookings for standard packages (both individual or group tours) are typically done by individuals who travel alone, together or are part of a small group consisting of friends or family. This can be a group on its own, or a smaller group within a bigger group. Booking is done online, but also by phone or sometimes even by visiting the tour operator. Bigger groups often request a tailor made package.

### **5.10 Bike rental/own bikes**

All tour operators mention that the packages they sell usually do not include rental bikes. Many tourists prefer bringing their own bike, especially for the more sportive products (road cycling/mountain bike). Bike rental is always offered. The choice for renting a bike or not is also very much dependent on the mode of transport. When travelling by plane tourists might rather rent a bike on the destination than bringing their own, because of practical reasons and the extra costs that would be involved.

### **5.11 Number of bike holidays**

Most cycling tourists go on a cycling holiday once a year. For fanatic road cyclists and mountain bikers this might be more often, but often mainly for training/racing purposes.

### **5.12 Branding value of races and competitions**

None of the tour operators consider races such as the Arctic Race of Norway as an opportunity to profile Norway as a cycling destination specifically (though it might profile Norway in general). Professional cycling is considered as a different world most cycling tourists do not identify themselves with. Also, racing is not connected to bookable cycling products. Of course there are examples in France and Italy, usually mountains and passes such as the Mont Ventoux and the Stelvio, which are considered as must-dos for road cyclists mainly caused by a long history of cycling and stories around these mountains. Norway doesn't have this history and international fame and it's difficult to create this. At the same time, cycling tourists who are more interested in soft-biking are not tempted by heroic mountains and scenery at all, as it's often considered too tough and only confirms the preconceptions they might have about Norway.

### **5.13 Main target group**

The main target group is 35+ or 40+ for all tour operators, for some products 45+, dependent on destination, level, and standard. The main focus is on soft biking, though two tour operators also offer some more demanding products.

### **5.15 Important success factors**

According to the tour operators destinations should make it easy for them to sell the destination, and make it easy for the tourist to actually go cycling there. This means first of all

bookable products and good information about the destination itself. Also, the destination has to create facilities for cycling tourism on the spot, such as routes, maps, information about the terrain and what to expect of information about for example cultural/historical sights. And of course, there's a need for accommodation, food, rental bikes and, one of the most important facilities, luggage transport.

Huge advantages for a destination are stunning nature and a guarantee for good weather. 'Good' weather would mean low chances on rain and comfortable temperatures (not too cold and not too warm). Elements that cannot be influenced, but still is an important consideration for many tourists when choosing a destination. If this cannot be guaranteed, you might have to persuade them a bit more and in a different way.

### **5.16 Best destinations**

The German speaking countries are mentioned by all tour operators, one of them also mentioned Denmark. This because of accessibility from the Netherlands, good routes and facilities, and many routes to choose from per area and per level. France is in general the most popular destination.

### **5.17 Main challenges for Norway**

The challenges for Norway as a tour cycling destination can be divided into two areas: challenges for the tour operators and challenges towards the consumer. The tour operators mention the following challenges for them selling Norway:

- Lack of products available in Norway
- Lack of knowledge about tour cycling in Norway
- Difficult to get in contact with and cooperate with Norwegian companies, whom they need to be able to package products.
- No guarantee for good weather which is a barrier for clients
- High price level
- Perceived by clients as a rough country and therefore very demanding
- Perceived by clients as a desolate country

### **5.18 Channels**

Tour operators use internet, social media, newspapers and magazines for promoting their products. But, there is a big difference in promotional activities both in print and online. Some also attend specific biking fairs or organize own presentations.

### **5.19 Cooperation with bloggers**

None of the tour operators interviewed is currently cooperating with bloggers, influencers etc.

## Conclusions and recommendations

Based on phase 1 and 2 and connecting this to the statistics mentioned in the introduction an increase in the demand for cycling tourism is clear. The current target group will become broader in the coming years because of the entry of the e-bike.

Norway fits well to the growing interest in theme based and active holidays and has a potential to become a known tour cycling destinations, but also some challenges. The challenges mentioned by the tour operators arise from a lack of knowledge about the destination, and a lack of knowledge about products. It's currently not easy enough for them to find new products and package them. This is an opportunity for Norwegian destinations and companies (and Innovation Norway), as they are important here and they can learn a lot about the markets from the tour operators in return.

**As a conclusion, the following main recommendations can be made:**

- Clear information about both destinations and products available online for both travel trade and consumers.
- Good and complete products available for tour operators. Creating good cycling facilities at the destination is one element, but supporting elements such as accommodation, food, and luggage transport are just as important. Cycling in Norway is considered 'adventurous' in itself (rough terrain, long distances, changing weather). This is not necessarily a problem for tourists, but comfortable accommodation, good food and other facilities such as luggage transport are much appreciated and important to create a good balance. Products should include all of these elements.
- Further specify target groups and needs within the already existing target group for cycling tourism. What became clear after phase 1 and 2, is that it is very important to be aware of the fact that cycling tourists can be further divided into different target groups and that these target groups have different needs. Also, it is important to realize that physical condition and cycling experience are relative and might differ from market to market. Norwegians might be used to cycling up- and downhill and consider a route as 'easy' where Dutch cyclists, coming from a flat country, already might consider this route as 'moderate'

## Attachment 1: list of tour operators

<b>Company name</b>	<b>Website</b>
Cycletours	<a href="http://www.cycletours.nl/">http://www.cycletours.nl/</a>
SNP Natuurreizen	<a href="https://www.snp.nl/thema/fietsreizen">https://www.snp.nl/thema/fietsreizen</a>
Bike tranz	<a href="http://www.bike-tranz.nl/">http://www.bike-tranz.nl/</a>
Bike-Dreams	<a href="http://www.bike-dreams.com/BD/NL/Home.php">http://www.bike-dreams.com/BD/NL/Home.php</a>
En Route	<a href="http://www.enroute.nl/">http://www.enroute.nl/</a>
Aktiva Tours	<a href="http://www.aktivatours.nl/fietsvakanties">http://www.aktivatours.nl/fietsvakanties</a>
Pharos Reizen	<a href="https://www.pharosreizen.com/fietsvakanties">https://www.pharosreizen.com/fietsvakanties</a>
Djoser	<a href="https://www.djoser.nl/fietsvakanties/">https://www.djoser.nl/fietsvakanties/</a>
KRAS	<a href="https://www.kras.nl/fietsvakantie/">https://www.kras.nl/fietsvakantie/</a>
Fiets Relax	<a href="https://www.fietsrelax.nl/">https://www.fietsrelax.nl/</a>
Global Cyclist	<a href="http://www.globalcyclist.nl/">http://www.globalcyclist.nl/</a>
Effeweg.nl	<a href="https://www.effeweg.nl/fietsreizen/">https://www.effeweg.nl/fietsreizen/</a>
Dalstra Reizen	<a href="https://www.dalstra.nl/fietsreizen">https://www.dalstra.nl/fietsreizen</a>
Paulusma	<a href="http://www.paulusma.nl/busreizen/fietsen/">http://www.paulusma.nl/busreizen/fietsen/</a>
Mountainbike Challenge	<a href="https://www.mountainbikechallenge.nl/mountainbike-reizen/">https://www.mountainbikechallenge.nl/mountainbike-reizen/</a>
MTBclinic	<a href="http://www.mtbclinic.nl/reizen/">http://www.mtbclinic.nl/reizen/</a>
Vasa Sport	<a href="http://www.vasasport.nl/fietsreizen">http://www.vasasport.nl/fietsreizen</a>
MTB Xperience	<a href="http://mtb-xperience.nl/">http://mtb-xperience.nl/</a>
Bike Travel	<a href="http://www.biketrip.nl/">www.biketrip.nl</a>
	<a href="http://www.thomascooksport.be/nl/fietsen/">http://www.thomascooksport.be/nl/fietsen/</a>
	<a href="http://www.northerntravel.nl/reisaanbod-noorwegen/fietsreizen-noorwegen/">http://www.northerntravel.nl/reisaanbod-noorwegen/fietsreizen-noorwegen/</a>
Northern Travel	<a href="http://www.northerntravel.nl/reisaanbod-noorwegen/fietsreizen-noorwegen/">http://www.northerntravel.nl/reisaanbod-noorwegen/fietsreizen-noorwegen/</a>
Uijting	<a href="http://uijting.no/index.php/nl/">http://uijting.no/index.php/nl/</a>
Amarant Reizen	<a href="http://amarantreizen.com/alle-reizen/noorwegen-fietsen-2016">http://amarantreizen.com/alle-reizen/noorwegen-fietsen-2016</a>
Sawadee	<a href="https://www.sawadee.nl/fietsvakanties/">https://www.sawadee.nl/fietsvakanties/</a>
ID Travel	<a href="https://www.idtravel.nl/fietsvakanties/fietsvakanties-index.html">https://www.idtravel.nl/fietsvakanties/fietsvakanties-index.html</a>
Zuiderhuis	<a href="http://zuiderhuis.be/fietsvakanties">http://zuiderhuis.be/fietsvakanties</a>
FS Travel	<a href="https://www.fstravel.nl/">https://www.fstravel.nl/</a>

## Attachment 2: List of cycling media

<b>Company name</b>	<b>Website</b>
Up/Down magazine	<a href="http://updown.soulonline.nl/">http://updown.soulonline.nl/</a>
Bikefreak magazine	<a href="http://nl.bikefreak-magazine.eu/">http://nl.bikefreak-magazine.eu/</a>
Mountainbike Plus magazine	<a href="http://mountainbikeplus.com/">http://mountainbikeplus.com/</a>
Bike & Trekking magazine	<a href="http://www.bikeandtrekking.nl/">http://www.bikeandtrekking.nl/</a>
Wielrevue magazine	<a href="http://www.wielrevue.nl/">http://www.wielrevue.nl/</a>
ProCycling magazine	<a href="http://www.procycling.nl/">http://www.procycling.nl/</a>
Fiets magazine	<a href="http://www.fiets.nl/">http://www.fiets.nl/</a>
Fietssport Magazine NTFU	<a href="http://www.ntfu.nl/Producten/FietssportMagazine.aspx">http://www.ntfu.nl/Producten/FietssportMagazine.aspx</a>
Wielersport Magazine KNWU	<a href="http://www.knwu.nl">www.knwu.nl</a>
Wielrenblad magazine	<a href="http://wielrenblad.soulonline.nl/">http://wielrenblad.soulonline.nl/</a>
Cyclelive magazine	<a href="http://www.cycleliveplus.be/index.php/magazines/cyclelive">http://www.cycleliveplus.be/index.php/magazines/cyclelive</a>
Cyclelive plus magazine	<a href="http://www.cycleliveplus.be/index.php/magazines/cycleliveplus">http://www.cycleliveplus.be/index.php/magazines/cycleliveplus</a>
Pedala magazine	<a href="http://www.pedalamagazine.nl/">http://www.pedalamagazine.nl/</a>
Grinta! Magazine	<a href="http://www.grinta.be/">http://www.grinta.be/</a>
Fietsactief magazine	<a href="http://www.fietsactief.nl/">http://www.fietsactief.nl/</a>
Mountainbike.nl	<a href="http://www.mountainbike.nl">www.mountainbike.nl</a>
Velozine.nl	<a href="http://www.velozine.nl">www.velozine.nl</a>
Bikesight.nl	<a href="http://www.bikesight.nl">www.bikesight.nl</a>
Offroadbiking.nl	<a href="http://www.offroadbiking.eu/">http://www.offroadbiking.eu/</a>
Fiets.nl	<a href="http://www.fiets.nl">www.fiets.nl</a>
wereldfietser.nl	<a href="http://www.wereldfietser.nl">www.wereldfietser.nl</a>

### Attachment 3: list of cycling organizations

KNWU	<a href="http://www.knwu.nl">www.knwu.nl</a>	
NTFU	<a href="http://www.ntfu.nl">www.ntfu.nl</a>	
ANWB	<a href="http://www.anwb.nl">www.anwb.nl</a>	
Fietzersbond	<a href="http://www.fietzersbond.nl">www.fietzersbond.nl</a>	



# Cycling tourism potential in Denmark

## 1. Summary

In the second quarter of 2016, Innovation Norway in Copenhagen did a market research project targeting DK cycling tour operators

The goal with the project was to get more knowledge about DK cyclist tour operators, relevant websites, cycling and outdoor magazines and relevant cycling organizations. The task was divided into two parts; the first part was internet based research, where we gathered information about the aspects mentioned above. After we had defined the tour operators, we picked out 4 and made telephone interviews with them. This was part two of the project.

Cycling is a popular activity amongst the Danish population. Most of our respondents informed us about a strong interest in cycling holidays particularly soft biking and a clear increase in this activity over the last year.

In relation to succeed as cycling destination Norway are facing some challenges according to the tour operators we talked with. Some of the issues mentioned are the short season, and the very high cost of living but also the lack of knowledge of Norway as a destination for biking was mentioned among the operators we interviewed.

## 2. Introduction

In Denmark there is a strong tradition for people from all strata of society to cycle. Most Danes associate the bicycle with positive values such as freedom and health, and in recent years cycling has actually become a symbol of personal energy. The bicycle has become ultramodern again, aided by societal development, successful political initiatives and conscious marketing. Especially Copenhagen is world famous for its biking culture and now officially the first Bike City in the World.

### **Some facts about cycling in Denmark:**

- On average, Danes cycle 1, 5 km a day.
- In 2013, almost 500,000 bicycles were sold in Denmark
- 45% of everyone who studies or works in Copenhagen cycles to their place of education or workplace.
- 18,100 electrical bicycles were sold in 2013.
- Nine out of ten Danes own a bicycle.
- There are approximate 300 cycling clubs in Denmark – most of them dealing with road cycling.

**Source: Cycling-Embassy Denmark**

### 3. Methodology

This knowledge transfer project was conducted by Innovation Norway's office in Copenhagen. The project was done through research on the internet and on the basis of existing knowledge. The following sections were mapped out in **phase 1**:

- Tour operators who offer cycling trips
- The most important websites/forums dealing with cycling.
- Cycling/outdoor magazines
- Cycling organizations

**Phase 2** was done by conducting telephone interviews where we spoke to 5 different tour operators. These were a mix of tour operators selling cycling holidays however at the moment only one selling a cycling product to Norway. The interviews were conducted between May and June 2016.

As a result of the telephone interviews and this report, we hope the reader will get a better understanding and knowledge about the DK cycling market, from a tour operators' perspective: a better target audience perception, important success factors for the suppliers, what countries count as the top cycling destinations, and what criteria needs to be met in order for a country or region to succeed as a cycling destination.



*Sykkelhjelp i Fjørå*  
*Photo by Mattias Fredriksson Photography AB - Vistinorway.com*

## 4. Desktop research: Phase 1

The first mapping was internet based where we answered a number of already identified questions, within the topics mentioned in the in methodology:

- Tour operators who offer cycling trips
- The most important websites/forums dealing with cycling.
- Cycling/outdoor magazines
- Cycling organizations

### 4.1 Tour operators in Denmark

We identified four tour operators – these are all marked in yellow. We looked at their target audience, what types of cycling trips the operator was offering and if they offer trips to Norway. Secondly we also took in considering if the operator had potential to deal with Norwegian suppliers in the future.

DK - tour operators	Webside URL	MTB	Tour cycling	Road biking
Ruby Rejser	<a href="http://www.ruby-rejser.dk/">http://www.ruby-rejser.dk/</a>		YES	YES
MTB Hartzen	<a href="http://www.mtbhartzen.dk/">http://www.mtbhartzen.dk/</a>	YES		
Mountainbikerejser	<a href="http://www.mountainbikerejser.dk/">http://www.mountainbikerejser.dk/</a>	YES		
MTB Verbier	<a href="http://www.mtbverbier.com/">http://www.mtbverbier.com/</a>	YES		
OutdoorPlay	<a href="http://www.outdoorplay.dk">http://www.outdoorplay.dk</a>	YES		
Dan Frost	<a href="http://dan-frost.dk/">http://dan-frost.dk/</a>			YES
Papuga Cykelrejser	<a href="http://www.papugacykelrejser.dk">http://www.papugacykelrejser.dk</a>	YES	YES	YES
Optur	<a href="http://www.optour.no/">http://www.optour.no/</a>		YES	
Ørslev Busrejser	<a href="http://www.orslev.dk">http://www.orslev.dk</a>		YES	YES
Culture Adventure	<a href="http://www.cultureadventure.dk/cykelrejser/">http://www.cultureadventure.dk/cykelrejser/</a>			YES
Tema Rejser	<a href="http://www.temarejser.dk">http://www.temarejser.dk</a>		YES	
Profil rejser	<a href="http://www.profil-rejser.dk">http://www.profil-rejser.dk</a>		YES	
Veggerby Sport & Kultur	<a href="http://www.vsok.dk">http://www.vsok.dk</a>			YES
Sci-cykelrejser	<a href="http://sci-cykelrejser.dk/">http://sci-cykelrejser.dk/</a>			YES
CyclingTours	<a href="http://cyclingtours.dk/">http://cyclingtours.dk/</a>			YES
MTB-rejser	<a href="http://www.mtbrejser.dk/">http://www.mtbrejser.dk/</a>	YES		
Høj-Mark rejser	<a href="http://www.hojmark.dk">http://www.hojmark.dk</a>	YES		
Mountain Adventures	<a href="http://www.mountain-adventures.dk">http://www.mountain-adventures.dk</a>	YES	YES	
Merlot Tours	<a href="http://www.merlottours.dk/">http://www.merlottours.dk/</a>		YES	
Gislev rejser	<a href="http://www.gislev-rejser.dk/">http://www.gislev-rejser.dk/</a>		YES	
Memory Tours	<a href="http://memorytours.dk/">http://memorytours.dk/</a>		YES	

### 4.2 Websites/forum

On the Danish marked you different forums and websites dealing with biking. We have listed some of the biggest and most important sites down below:

- <http://cykelpuls.dk/> (Primary focus is on road biking)
- <http://altomcykling.dk/> (Primary focus is on road biking)
- <http://cykel-bike.dk/> (A broad perspective on cycling)
- <http://mtbx.dk/> (Primary focus on MTB)
- <http://mtbdanmark.dk/> (Primary focus on MTB)
- <http://www.singletrack.dk> (Primary focus on MTB)

### 4.3 Cycling/outdoor magazines

On the Danish market you can find mainly 7 magazines for cycling in general. TheBikeMan has a wide-ranging perspective on cycling and the same goes for Cyklistforbundet – both magazines also cover tour cycling in tourism perspective. All the other magazines focus mainly on road biking but also deals with mountain biking. It seems like it is a growing market for especially online magazines such as Velovelo and TheBikeman.

- <http://cykelmagasinet.dk/>
- <http://www.cyclingplanet.dk/>
- <https://www.cyklistforbundet.dk/Aktuelt/Magasiner/Cyklister>
- <http://cykelmotion.dk/>
- <http://cykelmotion.dk/>
- <http://velovelo.dk/> (only online)
- <http://www.thebikeman.dk/> (only online)

### 4.4 Cycling organizations

In Denmark we have The Danish Cyclists' Federation. The Danish Cyclists' Federation or in Danish Cyklistforbundet is the only transport organization in Denmark that speaks the cyclists' cause. The Danish Cyclists' Federation is a non-political interest group. Most of their income comes from campaigns and other projects. More information can be found at their website: [www.cyklistforbundet.dk](http://www.cyklistforbundet.dk)

## 5. Telephone interviews: Phase 2

For the research part 2 we chose 4 operators for depth interviews. Only one has Norway in their program but in cooperation with a Norwegian operator. The others are not active in Norway. They are all based in Denmark and providing soft biking with day stages between 40 - 60 km.

### 5.1 Development of demand and characterization of demand

All interviewed persons confirmed an increase of demand for bike tourism over the past year. Especially the accommodation and luggage transfer are constantly asked for. There is also an increase of demand for roads organized for biking with good signs and good maps and really good bikes for renting.

### 5.2 Importance of e-bikes and explanation

Everybody agreed on that today e-bikes are absolutely important for developing bike tourism. They make people who wouldn't normally consider biking, give it a second thought. E-bikes also make it possible for couples to travel together despite one is in better shape/used to bike than the other.

One operator expects the demand for e-bikes and ordinary bikes to be fifty/fifty in a few years.

### 5.3 Demand for other activities/adventures on a biking holiday

All of the operators agreed on, that biking at a bike holiday is always the main activity and just a few are asking for more adventures in addition. If asked for any activities it could be wine tasting or cooking lessons.

#### **5.4 Kind of accommodation**

There was general agreement that bike tourists prefer nice hotels with breakfast included during their holidays. Preferably 3\*-hotels.

#### **5.5 Local food at destination and sustainable companies**

All operators confirmed that local food at a destination is very important to their customers.

Only 1 operator had customers requested companies marked as sustainable. A biking holiday itself is already seen upon as a sustainably travel.

#### **5.6 Special facility needs regarding accommodation**

All operators said that the breakfast should be included and if not at least possible to buy nearby.

In addition the hotels should be nice and of good quality and have Wi-Fi available.

#### **5.7 Target group's willingness to pay for the services and additional comments**

The highest willingness to pay for services is found among luggage transport and accommodation. Also equipment there was almost everywhere a high willingness to pay for. For the sustainability/sustainable solutions the willingness is lowest (not asked for).

#### **5.8 Other elements that bike tourists are willing to pay extra for**

An answer to this specific question could not be provided very often. But proper bikes and transfer are things that the tourists would pay extra for.

#### **5.9 Typical booking**

A typical booking are often single bookings, but travelling in a group. It depends on the different type of bike trips the operator provides.

(It was not possible to select two options in the questback)

#### **5.10 Bikes (own or hire on site)**

There was general agreement that the bike tourists hire on site. This also has to do with the kind of travel the operators provide.

#### **5.11 Number of bike holidays of the main target group**

All of the operators agreed on that the main target group travel abroad once a year for bike holidays.

Many come back year after year.

#### **5.12 Races and competitions**

Races like Arctic Race of Norway do not inspire bike tourists to go to Norway at all.

#### **5.14 Important information's about the main target group**

All the operators have +40 as their main target group and mainly providing soft biking with day stages between 40 - 60 km. Luggage transport and really good bikes are always asked for.

Variation in the routes from day to day is very important and it's also important with good maps and routes constructed for biking.

#### **5.15 Important success factors for destinations**

Luggage transport is crucial! Next comes the infrastructure with routes that are very well thought through; the terrain varies, there are places to stop by, things to experience along the route and routes off the beaten track with little traffic, the tracks must be well marked, making it easy to find your way. In addition obvious the nature, landscape and highlights, as well as a good accommodation and good rental bikes are also important factors.

#### **5.16 Best countries/destinations for bike tourism**

All operators mentioned Germany and Austria. Both countries are easy to reach and have excellent routes constructed for biking. E.g. biking along the rivers makes the level not too difficult.

#### **5.17 Main challenges for Norway to succeed**

There are several challenges for Norway such as high prices and costs compared with the rest of Europe, very short season and the weather issue.

Along with this comes lack of knowledge among the operators and difficulty in finding the right products; “where do we find the exotic places which includes really nice food, stunning landscape and routes off the beaten track?”

Tour operators are depending on local companies who can arrange with luggage transport, help in case of emergency etc. but some of the operators have problems with finding Norwegian companies who’s willing to “share” and give provision. Seems like they have customers enough and/or do not have available capacity.

#### **5.18 Channels to reach the main target group**

Every operator uses the channels internet, SoMe, newspapers and bike magazines to reach the main target group. Trade fairs and catalogues are also used by some.

#### **5.19 Influencing bloggers etc.**

An answer to this specific question could not be provided by the operators.

## **Conclusions and recommendations**

There’s an increasing demand for biking and with the e-bikes it’s possible to reach new target groups. This research confirmed that Norway possesses many of the ingredients to be a world-class cycling destination including beautiful landscapes and nature. The challenge is to make Norway better known among the operators. They need help to find the right products including soft routes with variation, things to experience along the route and nice accommodation and food in the end of the day. Luggage transportation must always be included.

The operators are depending on local providers who can arrange the luggage transport, help ICE etc.



*Road cycling at Isfjorden.  
Photo by Mattias Fredriksson/[visitnorway.com](http://visitnorway.com)*

# Cycling tourism potential in Germany

## 1. Executive summary

Between February and May 2016 Innovation Norway (Oslo and Hamburg) and NCE Tourism did a market research project about bike tourism together. The goal of the project was to characterize the German tourism industry in relation to bike tourism and to get familiar with the different operators and their offers in this segment of the market. Through this, it could be achieved a better understanding of the target group and therefore a more purposeful marketing. The first part was an internet based research, where it was ask to gather information's about tour operator, bike magazines, organization and forums in Germany. The second part consisted of telephone interviews with five interesting operators.

Through this project, it was possible to see the important role bike tourism has become in the last years in Germany and what role this plays for Norway. It could also be demonstrated that Norway can be a promising and interesting destination for a lot of operators in the future.

## 2. Introduction

On the basis of the results of an analysis done by the German Cyclist's Association (ADFC) in 2016, it is possible to get an overview over the latest trends and developments in the sector of bike tourism in Germany.<sup>7</sup> In the last years bike travel increased by 11 per cent in Germany and thus also strengthens the incoming tourism in Germany. It is obvious that bike tourism is getting more and more attractive. They found out, that the majority of tourists travel with their own bike and the use of e-bikes in general is more than twice as high as against the previous year.<sup>8</sup> Less well trained bike tourists will be able to bike in every region and landscape as a result of this. The most popular trails in Germany are still the riverside cycle trails. In 2015 25 per cent of total population used their bike during a day trip. Furthermore internet is with distance the most important source of information for bike tourists and also 60 per cent are using classical bicycle tour maps. Even signposts are still important for orientation and one third are using GPS units. But over 80 per cent organize their trips completely individual and by themselves, just the target group over 65 years is more interested in package tours.<sup>9</sup> It is particularly interesting that every other traveling with their partner and very often with friends, but also 17 per cent of the bikers are traveling alone. The average age of the bike tourists in 2015 was 47,6 years. In addition to bike holidays are sightseeing/cultural travel popular. The study has shown that bike & hiking, bike & wellness and bike & sightseeing are popular combinations.<sup>10</sup>

## 3. Methodology

The content of this project is based on an internet based research, telephone interviews and an evaluation of ADFC-analyses.<sup>11</sup>

## 4. Research part 1: desktop research

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<sup>7</sup> See *ADFC-Radreiseanalyse 2016* of ADFC "Allgemeiner Deutscher Fahrrad-Club ADFC" (German Cyclist's Association). <http://www.adfc.de/radreiseanalyse/die-adfc-radreiseanalyse-2016>, 23.05.2016.

<sup>8</sup> See above.

<sup>9</sup> See above.

<sup>10</sup> See above.

<sup>11</sup> See above.



For the research part 26 operators from Germany (incl. one from Austria), 8 websites/forums, 9 magazines and 3 organizations/interest groups have been analyzed.

### **26 Operators:**

Among these operators are the big players and some very special niche players, for example bike tours combined with cruises. A lot of operators have a quite diversified portfolio from challenging mountain biking up to leisure biking with cultural highlights. Many of them offer beside their own tours and packages also tours in cooperation with other partners to extend their portfolio. Nearly all of them have destinations in different regions of Europe. Just 6 from 26 operators are specialized on one region. 50 per cent offer tours the entire year (all-season) in different destinations, the other part of operators are primary active from spring to autumn. Over 50 per cent are providing apart from biking other activities as hiking, ski and climbing. The main target groups of the different operators are very varied and cover a variety of bike tourists:

- Less active and inexperienced cyclists
- Active, trained and experienced cyclists
- Active people, families and handicapped people

Very often there are different difficulty levels of the tours for orientation which derive from the length of the route, the gradients and the length and frequency of breaks. Basically you can find following levels:

- easy
- easy to moderate
- moderate
- advanced

Almost all operators offer different topics within the tours with focus on sporty or cultural tours. Around 40 per cent of them working environmentally friendly and sustainable and even have a certification for it for example from TourCert, WWF, CSR and "Forum Anders Reisen". Over 90 per cent (24 of 26) operator have the possibility of online booking and moreover at 22 of them it's possible to order booklets, catalogues and brochures for free.

It becomes clear that for the majority of operators the target group is less active and inexperienced, and uses mostly trekking bikes. This is followed by operators for MTB-tours and just a few of them offer tours for racing bikes. A lot of operators also provide tours outside of Germany, often neighbouring countries, but also Asia, Africa or America. At the same time just 10 operators have Norway in program. With regard to the others, Norway as a destination is playing a tangential role, because there are often just one or two tours for bike holidays in program.

15 of 26 operators offer standard packages as well as individual tours. Most of them have prepared routes with or without guides. Accommodation and luggage transport is included here and partially there is also arrival/departure and food included as well.

At all websites of the operators you can find descriptions of the tours and the prices. Nevertheless, are the websites often very outdated and old-fashioned. In general it would make sense to the majority of operators to focus on Norway as a further destination.



Rallarvegen

Photo by Sverre Hjørnevik/visitnorway.com

### **9 magazines:**

On the German market you can find mainly 9 bigger magazines for biking in general. Three of them have more or less bike tourists and leisure cyclists as target group (Aktive Radfahren, Bike & Travel, RADtouren- Das Radreise-Magazin). One is especially for bike trekking (Trekkingbike). The other ones are focused on people with special interest, very active sporty bikers and are kind of scene magazines. Three magazines are especially for racing bike (RennRad, Tour, RoadBike) and two for mountain biking (Freeride, Bikesport). Very often a publisher has several bike magazines and it seems that all magazines are structured similar.

### **3 organizations/interest groups:**

There are just a few organizations focusing bike tourism and bike travel in Germany. The biggest one is the ADFC (German Cyclist's Association), which is working with cities, state and federal governments to improve the conditions for everyday cycling as well as cycling for tourists. It is mostly political work in Germany.

### **8 websites/forums:**

The content of the different websites and forums is often about reviews, field reports of certain bike tours and general information regarding bike tours and bikes in general. Some forums supporting people in planning their own tour all over the world, helping to find travel partner and provide a platform for field reports. Some forums provide also a page for tour operators to introduce themselves as well as regions, bike tracks, bicycle friendly hotels etc.

5.

## **Research part 2: Depth interviews**

For the research part 2 we chose 5 interesting operators for depth interviews. Two operators have already Norway in program for bike holidays and another one for hiking tours. The others are not active in Norway so far. Mostly all of them have their offices in Germany.

### **5.1 Development of demand and characterization of demand**

All interviewed persons confirmed an increase of the development of demand for bike tourism over the past year. Especially the accommodation, good food and luggage transfer are constantly asked. There is also an increase of demand for road conditions, equipment, organization and country combinations while bike holidays.

### **5.2 Importance of e-bikes and explanation**

Everybody agreed about that today e-bikes are absolutely important for developing bike tourism. An explanation was for example that e-bikes are fashionable at the moment, but also decreases inhibitions, and help older and untrained people to have safety to keep up with the group.

### **5.3 Demand for other activities/adventures on a biking holiday**

All of the operators agreed on, that biking at a bike holiday is always the main activity and just a few are asking for more adventures in addition. But if there is a demand for activities in addition to biking,

than it is often ask for: culture, hiking, canoe, highlights at nature, sightseeing, boat trips or guided walks through the vineyards.

### **5.4 Kind of accommodation**

There was general agreement that bike tourists prefer hotels and guesthouses while their holidays.

### **5.5 Local food at destination and sustainable companies**

4 of 5 operators confirmed that local food at a destination is very important to their customers and that they requested companies marked as sustainable and environmentally certified.

### **5.6 Special facility needs regarding accommodation**

All operators said that the meals (breakfast and dinner) are very important and essential for their customers as well as a central location. In addition the hotels should be comfortable, of good quality and cleanliness. Preferred are often family-run businesses.

### **5.7 Target group's willingness to pay for the services and additional comments**

The willingness to pay for services was different for each operator. All of them agreed on that you can find a high willingness to pay for the planning and organizing of the bike trips and adventures, and for the luggage transport between destinations. Also for sustainability, local food and equipment was almost everywhere a high willingness to pay for. For the accommodations there is mostly a medium willingness to pay.

### **5.8 Other elements that bike tourists are willing to pay extra for**

An answer to this specific question could not be provided very often. Elements regarding the adventures that the bike tourists are willing to pay for are for example special extension offers or a repair service.

### **5.9 Typical booking**

A typical booking are often group bookings, but also single bookings. It depends on the different types of bike trips the operator provides. It was not possible to select two options in the questback.

#### **5.10 Bikes (own or hire on site)**

There was general agreement that the bike tourists often bring their own bikes for the trips, especially when it is a very sporty trip or at mountain bike trips. But when it's a group trip or a very long arrival, than most of them hire bikes on site.

#### **5.11 Number of bike holidays of the main target group**

All of the operators agreed on that the main target group travel abroad once a year for bike holidays.

#### **5.12 Races and competitions**

It became clear that races and competitions like Arctice Race of Norway are not able to inspire bike tourists to go to Norway in general, just a sporadic number of tourists.

#### **5.13 Countries/Destinations the bike tourist's bucket list**

The answer on this question was very individual:

Germany, the neighbouring countries of Germany, Albania, Baltic States, Sweden, Denmark, Iceland, Nepal, Turkey, South Africa, Madagascar, Asia and Europe in general, Morocco, Sicily, Cambodia, Canada and Norway.

#### **5.14 Important information's about the main target group**

There are different information's from each operator. There is a demand for tours with kids and families, e-bikes and fellow travellers. Special needs are rental bikes of very good quality and there are often questions about technical features and equipment. It is also important to know about the transport of the bikes between destinations for some customers, especially when they travel with their own bikes.

#### **5.15 Important success factors for destinations**

The general consensus was that a good infrastructure and well developed cycle paths are very important for destinations. Right at the moment, the political situation is a crucial element of the success for destinations. Obvious the nature, landscape and highlights, as well as a good accommodation situation, good rental bikes and luggage transport are also important factors. At least a good and an expedient marketing will be a success factor for a destination developing bike tourism.

#### **5.16 Best countries/destinations for bike tourism**

Again the answer to the questions varies from one operator to another. Following countries are named for being the best countries in the world for bike tourism: Germany, Netherlands, Denmark, Scotland, Vietnam, Thailand, Benelux countries. One operator also says that it is actually a question of cooperation and teamwork between operators and companies on-site.

#### **5.17 Main challenges for Norway to succeed**

The main challenges for Norway are high prices and costs, just like the long arrival for some customers. Some operators gave the same answer as to the question of the most important success factor for a destination developing bike tourism in general. That means the political situation, a good infrastructure and well developed cycle paths, nature, landscape and highlights, as well as a good accommodation situation, good rental bikes and luggage

transport. One operator spoke about problems with some lessors of accommodations with regard to accessibility and contact in Norway.

#### **5.18 Channels to reach the main target group**

Every operator uses the channels internet, social media, newspapers and bike magazines to reach the main target group. Trade fairs, blogs, catalogues and associations are used of some of them too.

#### **5.19 Influencing bloggers etc.**

An answer to this specific question could not be provided of the operators.

## **Conclusions and recommendations**

Through this project, it was possible to see the important role bike tourism has become in the last years in Germany and what role this plays for Norway. It could also be demonstrated that Norway can be a promising and interesting destination for a lot of operators in the future.



Solsiden, Trondheim  
Photo by CH - Visitnorway.com

Knowledge transfer project 2016:  
**Cycling Tourism in Sweden**



## Knowledge transfer project: Cycling tourism in Sweden

### **Content:**

1. Abstract
2. Introduction
3. Methodology
4. Research part 1: Online research
5. Research part 2: In-depth interviews
6. Conclusions and recommendations
7. List of references / Table of data

## **1. Executive Summary**

In the second quarter of 2016, Innovation Norway in Sweden conducted a market research project targeting Swedish cycling tour operators.

The goal of the project was to gain more knowledge about Swedish cycling tour operators, relevant websites, cycling and outdoor magazines and relevant cycling organisations. The task was divided into two parts; the first part was online-based research, where we gathered information about the aspects mentioned above. After we had defined the tour operators, we picked out four and conducted telephone interviews with them.

Cycling is highly popular among Swedes as a means of getting to work and school and getting exercise, but also as a recreational holiday activity. The information we have gathered through surveys, articles and the interviews we have conducted with tour operators indicate that interest in all forms of cycling continues to rise.

The growing interest in cycling among Swedes, coupled with a number of parallel trends such as increasing environmental awareness, fast-improving health habits, a rising demand for locally produced food, and themed, active holidays, have turned cycling tourism into an activity right for its time.

Norway has the potential to be an excellent cycling tourism destination for the Swedish market. But there are a number of challenges to overcome for Norway to become a true cycling destination.

- It is vital that we ensure that the standard of the products (from accommodations and meals to cycling paths and service) meet the high demands of the cycling tourists/travellers.
- Conveying information on Norway as a cycling destination to the right target groups is also a challenge. We need to inform the travel industry of the opportunities which abound in Norway and make it easier for tour operators to package cycling trips. It is also important to communicate the message to the end consumers/travellers to change their views about Norway as a cycling nation.

It is also important to point out that Norway offers a major advantage with its close proximity to Sweden, which cuts down travel times at a time when an increasing number of travellers take more, but preferably shorter, holidays. Moreover, many countries throughout the world are considered increasingly less secure for travel owing to the threat of terrorism and natural disasters, so many consider Norway as a safe, secure travel destination located close to home. But Norway's major benefit is, of course, the access to its stunning natural scenery which acts as a gorgeous backdrop for our future cycling tourists.

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## 2. Introduction

Interest in cycling in Sweden is enormous and over the past 10 years it has grown dramatically. The interest in cycling among Swedes runs parallel with a number of other trends in this country such as healthy living and exercise, increasing interest in racing/competitions, greater environmental awareness and other things.



Image: Swedish Cycling (Svensk Cykling) /Statistics:

Sifo

### The cycling habits of Swedes

It is difficult to find new statistics about the cycling habits of Swedes and the most recent report from Sweden's leading consumer research institute, SIFO, on the Cycling Habits of Swedes dates back to 2012<sup>12</sup>. However, that survey indicates that cycling had increased in popularity by a whopping 38% over a five-year span. It also showed that every fifth Swede bicycles 4 days or more a week to school and work during the spring/summer months. Almost a third, 30%, bicycle one or more times every week. In winter, the numbers are still impressive. Just under 20% bicycle at least one day a week and every 10th Swede bicycles to work/school/university 4 days or more every week.

This statistic can then be added to the increasing sales of bicycles every year and how interest in bike races such as Vätternrundan and Cykelvasan has exploded in recent years. The sale of spots in Vätternrundan 2016 was overwhelming; 95% of the spots were taken within 2 minutes of registration opening and within three hours the race was full<sup>13</sup>.

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<sup>12</sup> Source: SIFO survey: [The Cycling Habits of Swedes 2012](#)

<sup>13</sup> Swedish Cycling Bicycle Trend Report 2016  
<http://svenskykling.se/wp-content/uploads/2016/12/Cykeltrendrapport2016.pdf>

### **Cycling is right for the times**

Swedish Cycling Advocacy Association president Lars Strömgren feels that cycling and cycling tourism is right for the times and benefits from several trends in society today. In an article in the publication *Besöksliv* he points out how the growing interest in environmental issues, health and locally-produced food, as well as the demand for specially-themed package tours, benefit cycling tourism<sup>14</sup>.

The new travel habits of Swedes can also result in a boost in cycling tourism in our neighbouring country. Kairos Future Trend Report 2016 reveals that sun and sand still have the highest priority when Swedes plan their holidays and destinations, but further down the list, 38% say that they also want to experience nature on their vacations and hiking is one of the activities most desired by Swedish holidayers. In Kairos' list of the "Top Ten Growth Potential", cycling holidays come in at 6th place.

New trends also indicate that many Swedes prefer taking more but shorter holiday trips, which bodes well for nearby destinations and opens the door for trips with friends, family, and sports clubs<sup>15</sup>.

### **3. Methodology**

The first part of this KTP report on cycling tourism is an online desktop research section in which we have mapped out the Swedish market in terms of cycling tourism. We have listed tour operators, media outlets, forums and organisations which can be of relevance for a Visit Norway campaign for cycling holidays to Norway.

In part two of the report we have selected four tour operators who offer cycling holidays in Europe for in-depth phone interviews. The results and an analysis of the in-depth interviews are summarised and presented in this report.

### **4. Research part 1: Online research**

For the Swedish market, we have mapped out 20 or so tour operators who offer cycling holidays in Sweden, six cycling magazines, nine cycling forums and five cycling organisations.

#### **4.1 Tour operators**

We found roughly 20 operators who offer various forms of cycling trips/tours in their programmes. There are plenty of organisations in the Swedish travel industry who offer cycling trips, but very few offer Norway as a destination in their programmes. Those that IN has spoken to, however, say they are interested in adding Norway to their programmes. Most tour operators offer tour cycling in various forms, mostly in sun destinations in Europe such as Italy, France, Germany and Spain. These trips take the form of either group packages or individual trips and vary in terms of difficulty.

But in keeping with the new travel trends on the market and in society in general, we have also noted that a growing number of operators supplement their packages with adventure travel tours as well as training trips. New operators are popping up on the market offering MTB trips, and for these operators Norway is an important destination. One such example is Fjälläventyr, which offers cycling holiday trips in Sweden and Norway.

Operators usually offer cycling trips with varying degrees of difficulty, ranging from soft to hard and the target groups vary depending on the type and difficulty level of the trip. But common to most operators is that the target group is over 45 years of age and travels with friends or in couples and without children. However, some operators offer family and Meetings travel.

A few of the operators offer themes for their cycling tours, often associated with food and wine or bikes and boats. Most trips are, however, pure cycling holidays. They also stated that sustainability

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<sup>14</sup>The article in *Besöksliv* on cycling tourism: <http://www.besoksliv.se/artikel/nu-goers-planer-foer-att-utveckla-landets-cykelturism-67911>

<sup>15</sup> Kairos Travel Trend Report 2016

issues are important for their business.

Cycling Sweden	<a href="http://www.cyclingsweden.se">www.cyclingsweden.se</a>
Cykeltours	<a href="http://www.cykeltours.se">www.cykeltours.se</a>
Prima Travel	<a href="http://www.primatravel.com">www.primatravel.com</a>
Tema resor	<a href="http://www.temaresor.se/Resor/Cykelresor/">www.temaresor.se/Resor/Cykelresor/</a>
Bike Europe	<a href="http://www.bikeurope.se">www.bikeurope.se</a>
Fjälläventyr	<a href="http://www.fjallaventyr.com/">www.fjallaventyr.com/</a>
Cykelsemester	<a href="http://www.cykelsemester.se">www.cykelsemester.se</a>
Loca France	<a href="http://locafrance.se/">http://locafrance.se/</a>
Ving	<a href="http://www.ving.se/traningsresor/cykelresor">http://www.ving.se/traningsresor/cykelresor</a>
Triponsport	<a href="http://www.triponsport.se/cykelresor.asp">http://www.triponsport.se/cykelresor.asp</a>
Camp Mallorca	<a href="http://www.campmallorca.se">http://www.campmallorca.se</a>
Evertrek	<a href="http://www.evertrek.se/resor/cykling">http://www.evertrek.se/resor/cykling</a>
Travl	<a href="http://www.travl.se/cykelresor.html">http://www.travl.se/cykelresor.html</a>
Scandinavian resort	<a href="http://www.scandinavianresort.se/cykling">www.scandinavianresort.se/cykling</a>
Gyllene turer	<a href="http://www.gylleneturer.se">www.gylleneturer.se</a>
Naturens bästa	<a href="http://www.naturensbasta.se">www.naturensbasta.se</a>
Bike Sweden	<a href="http://www.bikesweden.se">www.bikesweden.se</a>
Bed and bike	<a href="http://www.bedandbike.se">www.bedandbike.se</a>
Sweden by bike	<a href="http://www.swedenbybike.com">www.swedenbybike.com</a>
Crow Adventures	<a href="http://www.crowadventure.se/">http://www.crowadventure.se/</a>

#### **4.2 Press**

There are a total of six different cycling magazines on the Swedish market, which is a large number for a niche market in Sweden. Two of these are pure MTB magazines while four of them cover cycling from a broader perspective. In addition to these cycling magazines, there are a large number of training and outdoor magazines that write about various forms of cycling on a regular basis. All of these magazines have their own websites and a few have blogs, forums and online versions. All of the magazines have their own travel pages and ideas for cycling destinations.

Bicycling	<a href="http://www.bicycling.se">www.bicycling.se</a>
Cycling Plus	<a href="http://www.cyclingplus.se">www.cyclingplus.se</a>
MTB Sweden	<a href="http://www.mtbsweden.com">www.mtbsweden.com</a>
Allt om MTB	<a href="http://www.alltommtb.se">www.alltommtb.se</a>
Tidningen Cykla	<a href="http://www.cykla.se">www.cykla.se</a>
Cykling – Swedish Cycling Advocacy Association Magazine	<a href="http://www.cykelframjandet.se/om-oss/tidningen-cykling/">www.cykelframjandet.se/om-oss/tidningen-cykling/</a>

#### **4.3 Forum**

There are a large number of cycling forums in Sweden. In our survey we have listed the nine biggest online cycling forums, but there are of course many more which are slotted into different niche interests. Happyride is the largest and most important cycling media site in Sweden with over 270,000 unique visitors a month.

Velo.se	<a href="http://www.velo.se">www.velo.se</a>
Cykelsmart.se	<a href="http://www.cykelsmart.se">www.cykelsmart.se</a>
Happyride.se	<a href="http://www.happyride.se">www.happyride.se</a>
Cykelturistnätverket	<a href="http://www.cykelturistnatverket.se">www.cykelturistnatverket.se</a>
Bicycling.se	<a href="http://www.bicycling.se">www.bicycling.se</a>
Cykelbloggar.se	<a href="http://www.cykelbloggar.se">www.cykelbloggar.se</a>
Cykelforum	<a href="http://www.cykelforum.se">www.cykelforum.se</a>
Cykel	<a href="http://www.cykl.se/Forum">www.cykl.se/Forum</a>

Svensk Cykelturism	<a href="http://www.svenskcykelturism.se">www.svenskcykelturism.se</a>
Funbeat	<a href="http://www.funbeat.se">www.funbeat.se</a>

#### **4.4 Organisations**

Svensk Cykling is an umbrella organisation aimed at bringing Sweden's cycling organisations under one roof. Svensk Cykling includes the Cykelbranschen, Swedish Cycling Advocacy Association, Swedish Cycling Association, Swedish Nature Conservation Society and Vätternrundan. They are all involved in promoting Sweden as a biking nation.

Svensk Cykling	<a href="http://www.svenskcykling.se">www.svenskcykling.se</a>
Svenska Cykelsällskapet	<a href="http://www.svenska-cykelsallskapet.se">www.svenska-cykelsallskapet.se</a>
Cykelfrämjandet	<a href="http://www.cykelframjandet.se">www.cykelframjandet.se</a>
Cykelbranschen	<a href="http://www.cykelbranschen.se">www.cykelbranschen.se</a>
Svenska cykelförbundet	<a href="http://scf.se/">http://scf.se/</a>

### **5. Research, part 2: In-depth interviews**

In part two of the report, four tour operators have been chosen and undergone in-depth interviews on their experiences related to cycling trips. We have picked operators who offer tour cycling - not MTB or road cycling. It is important to note that none of the operators interviewed offer Norway in their travel packages today, so answers were based on their experiences of trips mainly in southern European countries. The tour operators are, however, interested in dealing more with Norway in the future and hopefully bringing Norway into their cycling travel packages as a destination.

#### **5.1 Demand for cycling products**

The demand for cycling products is rising steadily in Sweden. Two of the operators interviewed have seen an increase and the other two have seen a major increase in the demand for cycling trips in recent years.

What emerged from the interviews was that the operators see an increase in demand for guided trips with Scandinavian-speaking guides. There is a demand for accommodation, packaging, a grading of degree of difficulty, and choices with or without flights. They also see a general increase in demand for active holidays.

#### **5.2 Ebikes**

In terms of Ebikes, there is some hesitation among Swedish operators. Three of the four interviewed did not feel that they were important for the growth of cycling tourism, and that there is still skepticism surrounding E-bicycles even if they are generally more accepted today than before. One of the operators had tried to sell Ebike trips, but without success.

#### **5.3 Other activities during a cycling holiday**

Cycling is the main focus of the operators' cycling trips. But on some of the trips there can be demand for supplementing the tours with other activities, and in that case primarily to visit cultural sites and tourist attractions.

#### **5.4 Accommodation**

All the operators interviewed replied that their guests mainly want to stay in hotels or guest houses. This of course depends on which type of tour and activity the cycling trip involves. But the general trend in Sweden is that an increasing number of travellers want active, outdoor holidays while still appreciating nice accommodations and good food.

#### **5.5 Local food and sustainability**

Swedish travellers are growing much more aware of sustainability issues in relation to their holidays. Good, well prepared food is also important for a successful holiday. Locally produced food and local wines are an experience in themselves, which more and more people appreciate and ask for. Three of four operators said that this is a very important issue for their travellers, while one operator felt that it was not important. Half of the operators also answered that their customers looked for environmentally certified companies.

#### **5.6 Special facility needs regarding accommodation**

When it comes to accommodation, it is important that hotels are bicycle friendly and provide access to

bicycle service and a storeroom for storing bicycles at night. Operators offering cycling trips to Europe also felt that their travellers preferred relatively high quality 4 star hotels.

### **5.7 Willingness to pay for service**

When asked what travellers are willing to pay for, all the interviewees said that there was a great willingness to pay for accommodation and baggage transport between the destinations. Three of four also felt that there is a substantial willingness to pay for local foods and to receive help organising and planning the trip, and one of the operators valued these as a medium willingness to pay. On the question of renting bicycles, three of four said there is a moderately large interest while one claimed that interest in this is high. This is why bike rentals is an important aspect of cycling trips. The importance of guiding and sustainability issues have appeared to a greater extent in the answers; 25% felt that these are of high importance, 25% medium and 50% said there is little interest in paying for these.

Generally, the operators said there is a substantial demand for all-inclusive package tours with high quality accommodation, meals and activities. The availability of baggage transport and Scandinavian-speaking guides is also prized highly.

### **5.9 Booking behaviour**

Group bookings are as frequent as single bookings, and travel groups consist of families just as often as friends. Clubs, teams or Incentive trips, however, are not as common.

### **5.10 Bike rental/own bikes**

All the operators we interviewed offered their guests the opportunity to rent bicycles on site. On their trips, mainly to European destinations, no one brings their own bicycles. But this could change when Swedes travel to Norway on holiday.

### **5.11 Number of bike holidays**

This target group frequently books cycling trips; 50% of the operators answered that their guests take several cycling trips a year, while 50% said that their guests return once a year.

### **5.12 Branding value of races and competitions**

All the operators replied that there is no interest in races or cycling competitions among their target groups. Sweden does, on the other hand, have special cycling tour operators who specialise in competition and pure training trips, but those operators did not participate in this survey.

### **5.13 Tourists' bucket lists**

The countries that are most popular and included on cycling tourists' bucket list are mostly located in Europe. These include Spain, Holland, Italy, France, Germany and Majorca (Spain). But more exotic destinations, such as Cuba, are also mentioned.

### **5.14 Main target group**

According to the operators we have interviewed, cycling travellers are usually middle aged and older, often retirees who want a reasonably active holiday. They have no children still living at home, plenty of time on their hands and a solid economy, so they are prepared to pay for comfort and to have someone else do the planning for them. One of the operators also noticed a greater demand for single rooms, even in cases where they are travelling together with friends or family. In this survey we have interviewed operators who offer tour/holiday cycling. If we had interviewed cycling tour operators who offer MTB or more adventurous and demanding cycling (which is often offered in Norway), it is more than likely that the target group would have been a little younger.

### **5.15 Important success factors**

According to the tour operators, it is important to figure out how the cycling tourists think and try to meet their needs as far as possible, which ranges from adapted accommodation close to cycling paths, good service in case something happens, meals, transport to quality packaged tours, etc. It is also important that the cycling paths are of a high standard, with sparse traffic and plenty of rest areas that offer food and drink.

### **5.16 Best countries/destinations for bike tourism**

Countries which tour operators mentioned as the very best for cycling tourism were Holland, Belgium, France, Germany and Italy. But, as one of the operators added, Norway could also be one of the best countries to consider given the beautiful natural scenery which that country offers.

### **5.17 Main challenges for Norway**

The greatest challenges for Norway according to the operators are the uncertainty of the weather and the rolling landscape, but also prices in Norway and the agency rates for hotels, which are both high. One of the operators also mentioned that it is difficult to convey the message of Norway being a good cycling country to the target group. Destinations like Majorca, Italy and France sell themselves, due in part to the stability of the weather.

### **5.18 Channels**

All of the tour operators rely on the Internet as their primary communications channel to convey their message to target groups, but cycling magazines are also popular vehicles for advertising. Half of the operators use social media, but only 25% rely on daily newspapers, fairs and exhibitions, and blogs.

### **5.19 Cooperation with bloggers**

None of the tour operators we interviewed have developed relations with bloggers.

## **6. Conclusions and recommendations**

Through this report's various sections - market reporting of Swedish cycling media, organisations and travel operators offering cycling tours, presentation of available statistics and in-depth interviews with a number of operators - we arrived at a clear picture of the rising interest in cycling and cycling tourism in Sweden.

Many factors point to Norway as a country with enormous potential for growth as a cycling destination for Swedes, but we also realise that there are a number of obstacles to overcome before Norway becomes a fully developed cycling destination. The operators we have interviewed do not at present include cycling trips to Norway in their programmes. However, they are all interested in learning more about Norway's cycling opportunities and consider it likely that they could sell more in Norway in the future. The attraction of Norway is of course the beautiful natural scenery, but also its proximity to Sweden.

The operators we have interviewed all have a target group which is middle aged and older and often with time on their hands and solid finances. As a result, they demand a high level of comfort and are willing to pay for good accommodations, baggage transport and to have someone else plan the trip for them. For this reason it is important that Norway's cycling products can live up to the wishes of the travellers.

According to the tour operators, it is important to figure out how the cycling tourists think and try to meet their needs as far as possible, which ranges from adapted accommodation located close to cycling paths, good service in case something happens, good (and preferably locally-produced) meals, easy transport and to all-inclusive quality packaged tours. It is also important that the cycling paths are of a high standard, with sparse traffic and plenty of rest areas that offer food and drink.

One trend in Sweden is that a growing number of travellers wish to stay active and experience nature on their vacations, but without compromising on the standard of accommodation and quality of the meals.

The greatest challenges for Norway according to the operators are the uncertainty of the weather, the rolling landscape, and the generally high level of prices in Norway. The operators also mentioned that it is difficult to convey the message of Norway being a good cycling country to the target group. In contrast to southern European countries, Norway is not a natural sell as a cycling destination, partly due to its unstable weather.

The operators said there is a substantial demand for all-inclusive package tours with high quality accommodation, meals and activities. The availability of baggage transport and Scandinavian-speaking guides is also prized highly.

The conclusion, therefore, is that there is a two-part challenge for Norway as a cycling destination:

- First, it is vital that we ensure that the standard of the products (from accommodations and meals to cycling paths and service) meets the high demands of the travellers.
- Second is the challenge of disseminating information on Norway as a cycling destination to the right target groups. We need to inform the travel industry of the opportunities which abound in Norway and make it easier for tour operators to package cycling trips. It is also important to communicate the message to the end consumers/travellers to change their views about Norway as a cycling nation.

## **7. List of references / Table of data**

### **Sources:**

Kairos Travel Trend Report 2016

SIFO survey: [The Cycling Habits of Swedes 2012](#)

Swedish Cycling's Cycling Trend Report 2016:

<http://svenskykling.se/wp-content/uploads/2016/12/Cykeltrendrapport2016.pdf>

Article in the magazine Besöksliv on cycling tourism:

<http://www.besoksliv.se/artikel/nu-goers-planer-foer-att-utveckla-landets-cykelturism-67911>

### **In-depth interviews with the following tour operators:**

Cycling Sweden [www.cyclingsweden.se](http://www.cyclingsweden.se)

Prima Travel [www.primatravel.com](http://www.primatravel.com)

Tema resor [www.temaresor.se/Resor/Cykelresor](http://www.temaresor.se/Resor/Cykelresor)

Bike Europe [www.bikeurope.se](http://www.bikeurope.se)



# Cycling tourism potential in USA

## 1. Executive Summary

In the second quarter of 2016, Innovation Norway in New York conducted a market research project targeting US cycling tour operators.

The goal of the project was to get more knowledge about US cycling tour operators, relevant websites, cycling and outdoor magazines and cycling advocacy organizations. The task was divided into two parts: the first part was internet based research, where we gathered information about the aspects mentioned above. After we had defined the tour operators, we picked out 5 and conducted telephone interviews with them. This was part two of the project. Cycling is a popular activity amongst the US population and is steadily increasing in popularity as time goes by. All of our respondents informed us of a continued strong interest in cycling partly thanks to an increased interest in being active when on holiday and also thanks to innovations in the industry such as eBikes that open up the activity to more individuals of varying ability and skill.

Throughout this project, we have also approved Norway's strong attractive position as "one of the countries you have to visit at least once in your lifetime". Norway has beautiful nature with a variety of landscapes and superior tourism and transportation infrastructure. On the other hand, Norway also faces many challenges due to the high costs compared to other European destinations, relatively short season and erratic weather and a general lack of knowledge when it comes to what's available to see and do.

This project also confirmed the many specific needs of the American traveler that could make or break a destination. Most importantly, this includes high quality accommodations and equally high quality levels of service – both areas Norway has been known to struggle with.

## 2. Introduction & Methodology

This knowledge transfer project was conducted by Innovation Norway's office in New York. The project's target audience was US citizens who have got cycling as a special interest.

The project was conducted in two phases:

*Phase 1* was done through research on the internet and on the basis of existing knowledge.

The following sections were mapped out in phase 1:

- Tour operators who offer bicycle trips
- The most important websites/forums dealing with bicycle tourism
- Bicycle magazines
- Bicycle advocacy groups

It should also be noted that because of the substantial overlap between US and Canadian tour operators, Canadian tour operators were included in this study as they typically sell to American clients just as much, if not more, than to Canadians. Conversely, American tour operators tend to sell to both American and Canadian clients together.

*Phase 2* was done by conducting telephone interviews where we spoke to 5 different tour operators. These were a mix of tour operators selling Norway and operators not selling Norway in their programs.

The interviews were conducted between May and June of 2016.

As a result of the telephone interviews and this report, we hope the reader will get a better understanding and knowledge about the US cycling market, from a tour operator's perspective. This includes a better perception of target audience, understanding of success factors for suppliers, an awareness of what countries top the charts when it comes to cycling destinations and a sense of what criteria needs to be met in order for a country or region to succeed as a cycling destination.

### **3. Research on the Internet: Phase 1**

The first mapping was internet based where we answered a number of already identified questions within the topics mentioned in the introduction:

- Tour operators who offer bicycle trips
- The most important websites/forums dealing with bicycle tourism
- Bicycle magazines
- Bicycle advocacy groups

#### **4.01 Tour Operators:**

We identified 12 US tour operators. We looked at their target audience, what types of trips the operator is offering, if they have an environmentally friendly focus, if they offer trips to Norway, and if they are of interest to Norwegian suppliers.

#### **4.02 Websites/Forums:**

We identified five websites with focus on people enjoying bicycling. We looked at their target audience, what their websites are about, if they are using social media and advertising opportunities.

#### **4.03 Magazines:**

We identified five bicycle related magazines. We looked at their target audiences, how the magazines are distributed and cost to advertise.

#### **4.04 Advocacy Groups:**

We identified five cycling organizations where we looked specifically at membership numbers, target audience, if they are organizing annual events and if they have a membership magazine.

### **4. In-Depth Telephone Interview: Phase 2**

In the first phase we identified 12 different US cycling tour operators. In depth interviews were conducted with five of them where we aimed at having a mix of operators selling Norway in their programs and operators not selling Norway.

#### **5.01 Offering of Trips to Norway**

Only one of the five tour operators interviewed currently offer programs to Norway and this is a newly established program to Lofoten. Another tour operator has announced they will begin programs to Norway in 2017 but are still putting together the details. Yet another is actively looking to build a Norway program but so far has yet to get it off the ground. The remaining two operators do not currently have

programs to Norway nor do they have any immediate plans to develop any. One operator said Norway is too expensive a destination compared to alternatives and that the season is too short for them to sell effectively.

### **5.02 Presence in Other Markets**

Of all of the operators interviewed, none of them maintain offices in other countries or markets. Each of them has only one office in their home market. This is typical for US tour operators of small to medium, and even some larger sizes.

### **5.03 Demand**

All of the operators interviewed reported an increase in bicycle tourism over the past year with one operator going so far as to report a “large increase” over the past year. One operator said that although the demand is growing, they feel that it’s growing slower than it should be due to security and terrorism concerns around the world leading to less travel. Generally, operators reported that consumers are always looking for ways to be more active in their holidays and also for ways to leave less of a footprint. Cycling vacations perfectly satisfies both of these desires.

More than one operator referred to cycling as “the new golf”. This is a definite trend where groups of men who historically may have bonded or did business on the golf course have now shifted to cycling as a more active and adventurous pastime. Operators reported that although men tend to be more interested in cycling trips than women, their desire may inspire a cycling trip with either a spouse or the family.

### **5.04 eBikes**

All of the operators interviewed agreed that eBikes are incredibly important for developing bike tourism although one did describe them as “expensive and problematic”. One operator reported that eBikes have been wonderful at giving those that are less interested in pushing themselves an opportunity or access to the same roads and sites as everyone else.

An example was given that if two couples are traveling together, the men may want traditional bikes whereas the women would prefer eBikes. This is also being seen with multigenerational groups. Those with lesser experience cycling can be intimidated by road biking and eBikes enable them to do the same trip as the rest of their group at a more relaxed pace. One operator reported having recently outfitted their entire fleet to offer eBikes in all destinations. They feel eBikes are a “great equalizer” and the reception has been phenomenal. Another operator reports that being able to rent an eBike may be what convinces a client to go on a trip.

### **5.05 Secondary Activities and Experiences**

All the tour operators surveyed confirmed that their clients are not looking for a trip that consists of cycling exclusively. Nearly all operators reported hiking as a secondary activity that cycling groups want to participate in. Other activities mentioned included golf, kayaking, sailing, walking tours and generally getting to experience what a destination is all about from a cultural and site-seeing perspective.

## **5.06 Accommodations**

100% of the tour operators surveyed reported that their clients are only interested in staying in hotels. Nearly all of them specified that their clients are looking for higher end accommodations (4 and 5 star) and that they are willing to pay extra for high-quality accommodations. One operator added that a “glamping” like experience (glamorous camping) would also be something their clients could be interested in.

All operators mentioned the need for en suite bathrooms, good WiFi and special services for cycling such as rooms to dry wet gear and places to securely park bicycles. Other amenities mentioned include ice machines, air conditioning, washing and drying facilities for laundry and, as a bonus, spa facilities.

## **5.07 Local Food**

All of the tour operators surveyed reported that local food in a destination is very important to their clients.

## **5.08 Sustainability**

Surprisingly, all of the tour operators interviewed reported no interest on behalf of their clients in working with companies marked as sustainable or environmentally certified. Two operators reported that they may still try to do so even though there is no outright demand from their clients.

## **5.09 Willingness to Pay (WTP)**

When it comes to what clients are willing to pay extra for, answers were fairly consistent across all surveyed tour operators.

### ***Accommodation***

Willingness to pay for higher end or higher quality accommodations was almost universal across all tour operators.

80% High WTP

20% Medium WTP

### ***Hire Equipment***

Getting a clear result on this question was a bit tricky as most of the operators surveyed include high-end equipment rental in the package price.

60% High WTP

40% Medium WTP

### ***Local Food***

Importance of local food was fairly consistent across the board.

80% High WTP

20% Medium WTP

### ***Guiding***

Willingness to pay for high-quality guiding was strong across the board except for one operator that offers self-guided tours and was therefore, not important at all.

80% High WTP

20% Low WTP

### ***Luggage Transport Between Destinations***

Since being confident your luggage will be waiting for you at the next stop, operators were fairly consistent on this metric with 100% reporting a high WTP.

### ***Planning/Organizing Bike Trips & Adventures***

Since planning and organizing bike trips and adventures is really the essence of what clients are paying for when going to an operator, WTP on this metric was consistently high across the board at 100%.

### ***Sustainability / Sustainable Solutions***

Consistent with question 5.08, all but one of the operators surveyed reported low WTP for sustainability. One operator rated it a medium WTP.

## **5.10 Typical Bookings**

All of the operators interviewed reported single bookings to be typical. This could include single people joining prescheduled groups defined by the operator, or private bookings to specific destinations for a closed group defined by the client.

## **5.11 Equipment**

80% of the operators surveyed reported their clients hire bikes and equipment on site once arriving at the destination. This is typically a service that the operator provides and is included in the package price. All operators reported that they do occasionally get a client that wants to bring their own bicycle however only one operator reported that most of their clients behave this way. Since most operators provide very high-quality equipment as part of the package price, most people are content to leave their bikes at home.

## **5.12 Frequency of Travel**

Depending on the level of affluence of an operator's typical client, answers to this question varied quite a bit. Three of the operators interviewed reported their clients take multiple bicycle trips per year some even reporting 3-4 in a single year spanning 2-3 weeks per trip. One operator said their clients do a cycling trip once a year and another said roughly every other year.

## **5.13 Races and Special Events**

Generally, there was not a lot of interest in large competitions such as the Arctic Race of Norway inspiring much cycling tourism. Three tour operators reported these events generate no interest in trip bookings. One operator said that an exception could be if a trip covered part of a very famous event route, such as being able to bicycle a piece of the Tour de France. Only one operator reported events such as these playing a large role in their business however they are the official tour operator of the Tour de France.

## **5.14 Bike Tourist Bucket List**

Consensus across the board was that the “essential” bicycle destinations include France, Italy and Spain. Beyond these, Asia was mentioned by three of the operators with specific mention being made of Vietnam and Thailand. Argentina and Chile were also mentioned by multiple tour operators. More far-flung destinations included Peru, Ecuador, Cuba, Australia and South Africa. Most operators mentioned an interest in exploring other parts of Europe beyond the traditional biking destinations of France, Italy and Spain.

### **5.15 Special Needs**

Tour operators were unanimous on the need for high-quality accommodations (with en suite bathrooms) and an equally high quality level of service. All agreed that Americans are more demanding when it comes to both of these areas and expect a level of service that often falls flat in Europe as well as other parts of the world.

Operators also mentioned a desire to maximize time on bicycles and minimize the time in vans or buses transferring. Long transfers by road are highly undesirable and can spoil the experience of a destination for these clients.

Other special needs mentioned included drying racks for wet gear and good parking for groups of bicycles and a support van.

### **5.16 Success Factors for Bicycle Tourism Destinations**

Most operators mentioned smooth pavement, low traffic, dedicated bike lanes, good WiFi, great accommodations and high levels of customer service and of course a destination that is scenically beautiful and enjoyable from a bike.

Two operators took this a step further and explained the need for suppliers on the ground to understand the needs of the American trade and be responsive, communicative and flexible when working with them. Tour operators want partners in the destinations that are going to go the extra mile and support them when

necessary. This is of extreme importance in allowing operators to feel confident in the quality of the package they are selling and build successful programs in new destinations.

### **5.17 Best Destinations for Bicycle Tourism**

All of the operators surveyed listed Italy and France as best-in-class when it comes to bicycle tourism destinations. Two of the operators also mentioned Spain. Other destinations mentioned included England, Scotland, Ireland, Argentina, Chile and California. The Netherlands was mentioned as a great destination for beginners due to its flat topography.

### **5.18 Challenges for Norway as a Bicycle Tourism Destination**

Tour operators felt that consumers may not know what Norway has to offer and that the destination can do a better job of communicating why someone would want to go there. Beyond that, operators felt the destination may not lend itself to multi-day cycling trips without moving hotels each night – something their clients prefer not to do. These operators are looking for destinations where clients can stay in the same

place 2-3 nights and go out on loop rides each day in order to avoid living out of a suitcase.

Other concerns repeated over and over included the cost of Norway compared to other European destinations as well as the short cycling season and general issues with weather.

Operators also repeated a challenge when it comes to finding local guides or suppliers that are willing to work with the American travel trade in the way they require.

### **5.19 Marketing Channels**

All of the operators we spoke to are using the Internet and their own websites to market themselves. Most are using social media and direct mail on top of that. Few also made use of trade fairs, newspapers, bike magazines, blogs, and PR. All rely very much on word of mouth and repeat business.

### **5.20 Influential Publications/Bloggers/Social Media Influencers**

None of the tour operators interviewed had any influential bloggers or social media influencers to report. Many reported their clients being inspired by travel and cycling related publications. *Afar* magazine was mentioned the most. After this was *Travel & Leisure*, *Conde Nast Traveler*, *Cyclist Magazine*, *Bicycling Magazine*, *Outside* and *The New York Times*.

## **Conclusions and Recommendations**

Cycling in the US is an in-demand activity that has been growing in recent years with no sign of slowing down. All of the tour operators interviewed confirmed increasing interest in cycling holidays this year as compared to last. We heard from more than one operator that biking is “the new golf” and has therefore become the new pastime bonding men together in sport and in business. From this, interest has leaked over to couples and families eager to experience cycling trips together and find new and more immersive ways to interact with destinations.

American travelers are very demanding and although they will happily ride a bike many miles all day, they expect (and are willing to pay for) a very high-level of accommodation and service to return to in the evening. En-Suite bathrooms, WiFi, air conditioning and spa facilities are expected. Cycling specific services such as drying rooms and machines for wet gear and parking and storage space for bicycles are demanded. Tour operators need suppliers that are aware of these demands and are easy to work with. This means being responsive, communicative, flexible and proactive in understanding the needs of the client.

This research has confirmed that Norway possesses many of the ingredients to be a world-class cycling destination including beautiful landscapes and nature, smooth roads and strong tourism and transportation infrastructure. The challenge remains to better communicate what Norway has to offer and why someone should travel to a place that is more expensive than its European neighbors with a shorter cycling season. Regardless, the opportunity is there for Norway to seize as cycling travel becomes more and more in demand and consumers continue to look for new and less known destinations to explore.





# References & Data – Tour Operators

Name of Company	Gray & Co	Freewheeling Adventures	Backroads	DuVine Adventures	Butterfield & Robinson	VBT
URL	<a href="http://www.grayandco.ca">www.grayandco.ca</a>	<a href="http://www.freewheeling.ca">www.freewheeling.ca</a>	<a href="http://www.backroads.com">www.backroads.com</a>	<a href="http://www.duvine.com">www.duvine.com</a>	<a href="http://www.butterfield.com">www.butterfield.com</a>	<a href="http://www.vbt.com">www.vbt.com</a>
Phone	416-998-4082	902-857-3600	800-462-2848	617-776-4441	866-551-9090	800-245-3868
Mass or Niche	Niche	Mass	Active - bikes, walking, river	Mass High End	Mass	Mass
Description	Exclusive, private bicycle tours	Small groups in Canada and Europe	Families and groups	Bike tours with focus on food	Quality tours, bike and walk	High value tours
Season	All	All	All	All	All	All
Target Market	High-end, private	Mid-range	Individual and Family	Higher end, food & drink	Individual, group, family	All, solo and group, older
Level of Experience	All	All	All	All	All	Experienced and New
Themed Tours	On request	Solo and family	Family Breakaway	Food and wine, Family Challenge	Family, food and wine	Culinary vacations
Destinations	Anywhere on request	Europe, Canada, Scandinavia	Europe, Asia, Latin America	Europe, Latin America, Africa	Europe, Africa, Aisa, Latin	Europe, Costa Rica, South Africa, NZ, Vietnam
Standard or Customized	Customized	Standard	Standard	Standard	Offer both	Both
Custom	Everything custom			Yes, private available	Fully private available	Bespoke groups
Packaging	Fully inclusive	Yes	Activities and some meals	Culinary	High end service	Yes, including air
Prices	Expensive	~\$3500, mid-range	~\$4k+ for 6 days	\$4500-5000	Mid-high end, \$6k	Affordable
Additional Activities	Tourism, golf, hiking, kayaking	Hiking and paddling	Walking, Hiking, River, Culinary	Food and wine	Family, food and wine	Local sites
Norway?	No	Yes	No - Sweden & Denmark	No	No	No
Sustainability Focus	No	No	No	No	No	No
Online Bookings	No	Yes	Yes	Yes	Yes	Online Requests
Brochures	Unknown	Unknown	Unknown	Unknown	Yes	Yes
Potential for Norway	Yes	Yes	Yes	Yes	Yes	Yes
Comments		Just started Norway tours			Denmark programs	

# References & Data – Tour Operators

Name of Company	Exodus Travels	Trek Travel	Easy Rider Tours	Bicycle Adventures	REI Adventures	Active Journeys
URL	<a href="http://www.exodustravels.com">www.exodustravels.com</a>	<a href="http://www.trektravel.com">www.trektravel.com</a>	<a href="http://www.easyridertours.com">www.easyridertours.com</a>	<a href="http://www.bicycleadventures.com">www.bicycleadventures.com</a>	<a href="http://www.rei.com">www.rei.com</a>	<a href="http://www.activejourneys.com">www.activejourneys.com</a>
Phone	844-227-9087	866-464-8735	800-488-8332	800-443-6060	800-622-2236	800-597-5594
Mass or Niche	Adventure	Mass	Mass	Mass	Mass	Mass
Description	40 years of extraordinary adventures	Best bikes and service	Cycling and walking off the beaten path	More domestic products	Outdoor outfitter	Older demo programs
Season	All	All	Summer	Summer	All	All
Target Market	Younger, adventure	Younger	Older	Domestic market	Store customers	45+
Level of Experience	Medium	Mid - high-end equipment	All	All	Mid	All
Themed Tours	Family, self-guided, premium	No	No	No	No	Not Really
Destinations	Italy, Morocco, India, Cuba, Vietnam	Europe, Asia, Latin	Portugal, Spain, Ireland, USA	Chile, NZ, Spain, Peru, Taiwan	Asia, Oz/NZ, Europe	Europe, Asia
Standard or Customized	Both	Both	Standard	Both	Standard	Standard
Custom	Private adventures available	Custom in some places	No	Available private	No	Not Really
Packaging	Fairly all included	Rides and food and hotel	Bikes, some food, transport	Bikes and accommodations	Basic	Full and self-guided
Prices	Reasonable	Mid - \$5,000	Reasonable, \$3200	Reasonable - \$3000	Mid-range	Reasonable
Additional Activities	Skiing, walking, wildlife	Trip Add Ons	Walking tours	Hiking, cross-country skiing	Basic	Walking
Norway?	Yes (but not cycling)	Yes - in 2017	No	No	No	No
Sustainability Focus	No	No	No	No	No	No
Online Bookings	Info Request Only	Yes	Online request form	Yes	Yes	No
Brochures	Yes	Yes	Yes	Yes	Yes	Yes
Potential for Norway	Yes	Yes	Yes	Yes	Yes	Yes
Comments		Starting Norway in 2017			Mostly non-cycling	Working on Norway

# References & Data – Cycling Websites & Forums

Cycling Website / Forum	Bike Forums	Cycling Forums	Bike Radar	CycleChat	CyclingNews
URL	<a href="http://www.bikeforums.com">www.bikeforums.com</a>	<a href="http://www.cyclingforums.com">www.cyclingforums.com</a>	<a href="http://www.bikeradar.com">www.bikeradar.com</a>	<a href="http://www.cyclechat.net">www.cyclechat.net</a>	<a href="http://www.cyclingnews.com">www.cyclingnews.com</a>
Phone	N/A	N/A	N/A	N/A	N/A
Target	Community, advocacy, safety, routes		Gear reviews	All elements of cycling interest	Cycling related news
Interest Area	General, niche, equipment	Equipment, Regional, Tours	MTN, Urban, Women	Classifieds, Training, general	News, races, events
Followers/Likes	Unknown	Unknown	127k Twitter, 320k Youtube, 177k G+	37,705 members	276k (Social)
Selling Tours	No	No	No	No	No
Themed Content	No	No	Gear	No	No
TO Aligned	No	No	No	No	No
Key Personalities	No	No	No	No	No
Advertising Cost	Part of IB network	Unknown	Ad network advertising, TripAdvisor	Programmatic ad networks	Programmatic, Immediate Media Co
Creative Ad Formats	Skyscrapers and Banners	Square and Skyscrapers	Skyscrapers and products	Square and banners	Banners and ad networks
Social Media Platforms	Unknown	Twitter	Twitter, Facebook	Facebook, Twitter	Twitter, Youtube
Potential for Norway	No	Some	No	No	Yes
Comments					

## References & Data – Cycling Magazines

Magazine	Bicycling	Bicycle Times	Adventure Cyclist	A to B	Road Bike Action
Phone	212-808-1316	800-762-7617	800-755-2453 x228	+44 (0)1305 259998	661-367-2109
Tourism Focus	No	No	Yes	No	No
Target	Bike/Health	25-54, male, college, \$90k+	College, \$81k+, male	eBikes, folding bikes, electric	Gear, parts, sales
Distribution	1.6MM readers	30,000	91,000 total readership	1,000 views per day	187,124
Publish Frequency	Monthly	Alternate Months	10 issues per year	Ongoing	Monthly
Lifetime	Unknown	Unknown	1976	Unknown	1980
Website?	Yes	Yes	Yes	Yes	Yes
URL	<a href="http://www.bicycling.com">www.bicycling.com</a>	<a href="http://www.bicycletimesmag.com">www.bicycletimesmag.com</a>	<a href="http://www.adventurecycling.org">www.adventurecycling.org</a>	<a href="http://www.atob.org.uk">www.atob.org.uk</a>	<a href="http://www.roadbikeaction.com">www.roadbikeaction.com</a>
Advertising Cost	\$60k full page color	\$3,500 full page color	\$4,100 full page color	£10/week	\$3840 full page color
Circulation	1.6MM print, 1MM online	30,000	91,000	1,000 views per day	187,124
Potential for Norway	Yes	No	Yes	No	No
Comments					

# References & Data – Advocacy Groups

Advocacy Group	Alliance for Biking and Walking	Bikes Belong / PeopleForBikes	CyclingSavvy	League of American Bicyclists	Adventure Cycling Association
URL	<a href="http://www.bikewalkalliance.org">www.bikewalkalliance.org</a>	<a href="http://www.peopleforbikes.org">www.peopleforbikes.org</a>	www.cyclingsavvy.org	www.bikeleague.org	www.adventurecycling.org
Phone	202-449-9692	303-449-4893	Unavailable	202-822-1333	800-755-2453
Members	233	"Millions"	Unknown	Unknown	48,000
Target	Local bike/walk advocacy groups	Individual riders	Individual riders	Individual riders	Adventure individuals
Characateristics	Policy, innovation, grants, capacity	Industry, suppliers, retailers, charity	Empowerment for unlimited travel	Create safer roads and stronger communities	Inspire travel by bicycle
Annual Events	Trainings and webinars	No	Ongoing Classes	No	No
Magazine?	No	No	No	No	Yes
Circulation and Frequency	N/A	N/A	N/A	N/A	9x/year to 48,000 members
TO Affiliate	No	No	No	No	Yes