

Scotland. Made for Cycling.



Gravel biking in Dumfries & Galloway © Galloway Cycling Holidays/Warren Sanders

The visitor opportunity

- Over **2.3 billion*** cycling tourism trips taken in Europe annually
- Generating an estimated value of **£37 billion***
- Scotland's share is **0.5% of trips and around 0.8% of spend**

	Cycling	MTB	Combined
Trips (000)	338	251	589
Nights (000)	1,322	1,234	2,556
Spend (£m)	£154	£112**	£266
No. of nights	3.9	4.9	-

- **Over 713K cycling day trips** taken in 2019, generating an additional **£16M**
- Key short haul target markets:
 - Netherlands (58% cycle > twice a week)
 - Germany (36% cycle > twice a week)
- Supports our **responsible tourism** and **Net Zero** ambitions

Sources:

Great Britain Tourism Survey 2019 (3-year average 2017-19)

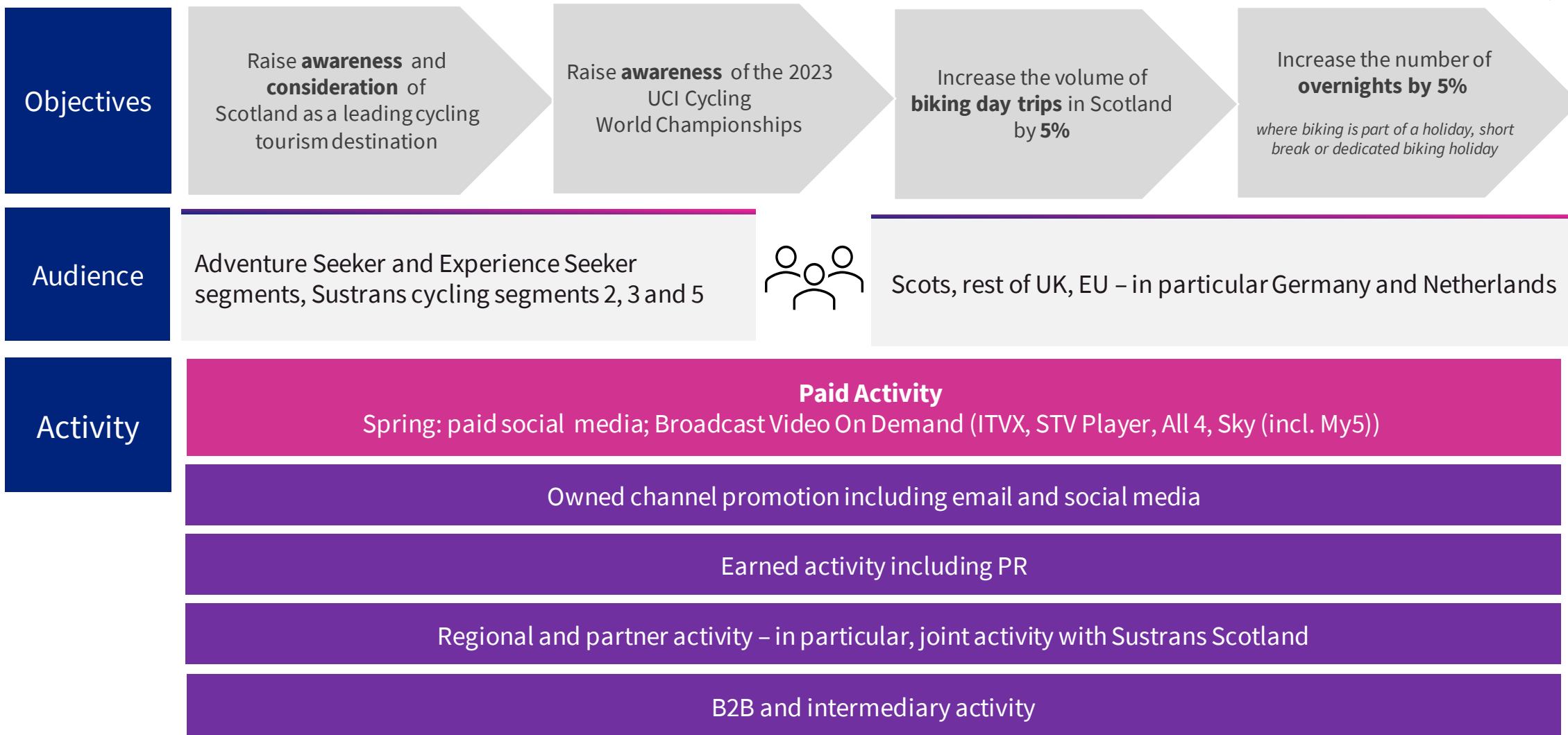
*European Cyclist's Federation report 2018

**Frontline Scotland 2016 estimated at £105m with potential to grow to £158m by 2025.



Short-term

Long-term



Scotland. Made for cycling.

...for mountain biking ...gravel biking...e-biking...family cycling...

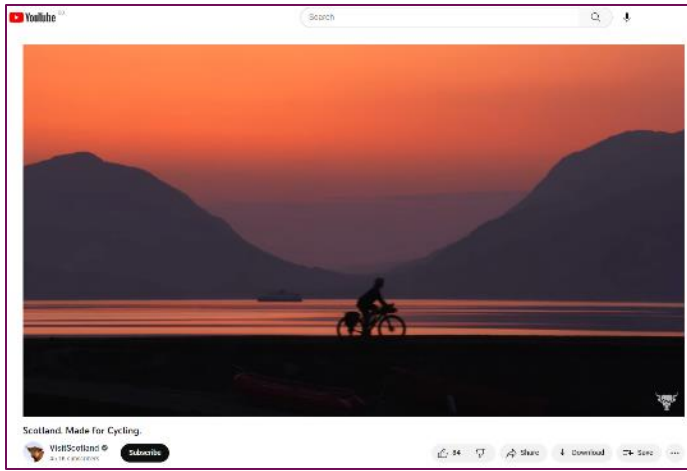
1. Bicycle invented by Kirkpatrick Macmillan in Dumfries & Galloway in 1839.
2. Huge variety of cycling routes through some of Europe's finest landscapes.
3. Right of responsible access, opening up the countryside for wilder trips.
4. National Cycle Network running to over 1,600 miles, 700 miles traffic-free.
5. Scotland is one of the world's top mountain biking destinations.
6. Growing number of pump tracks and bike parks help increase participation.
7. Top-class facilities e.g. Sir Chris Hoy Velodrome and Glasgow BMX centre.
8. An enviable and established track record of hosting top cycling events.
9. Significant public/private/academic sector collaboration and innovation.
10. Renowned ambassadors - Sir Chris Hoy, Danny Macaskill, Kriss Kyle, Jenny Graham.
11. Increasing accessibility to cycling e.g. Cycling Without Age.
12. Ongoing investment in infra-structure and initiatives e.g. Cycling Facilities Fund.
13. Ongoing promotion of cycling in Scotland, across multiple policy areas.

To share just a few examples...

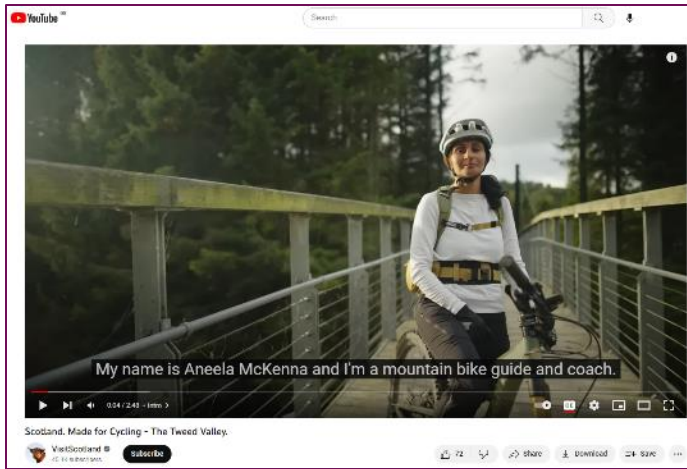


Tweedlove Skinny Tweed, Scottish Borders

Building the legacy – Raising awareness



https://www.youtube.com/watch?v=wr_PuVAYtzQ



<https://www.youtube.com/watch?v=Gx2P4e38kqc>

SCOTLAND | ALBA

2023 UCI CYCLING WORLD CHAMPIONSHIPS

The 2023 World Championships is set to be the biggest cycling event in history! You don't want to miss the thrill of the greatest riders competing for 12 world titles, all over Scotland this August. Take a look at the handy guide for all the information you will need to be prepared. Tickets are on sale from 2nd February.

EXPLORE BY BIKE

CYCLING HOLIDAYS

ADVENTURE ON TWO WHEELS

TRAVEL ACCOMMODATION ATTRACTIONS

Scotland | Alba

18

Stranraer to Eyemouth cycle route, Scotland

Southern stunner for two wheels

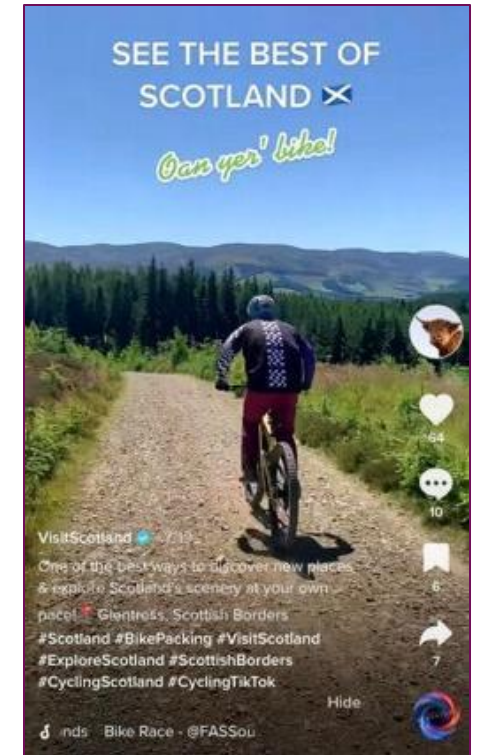
Cyclists in Galloway Forest Park. Photograph: Alamy

The rolling hills and ancient abbeys of the south of Scotland are often overlooked by visitors making a beeline for the Highlands, but a new 250-mile coast-to-coast cycle route, from Stranraer to Eyemouth, will remind people of the beauty at the bottom of the country. The route, which weaves from west to east on quiet roads, will take riders to Newton Stewart and the Galloway Forest Park, the UK's first Dark Sky Park. From there, a maze of leafy minor roads, with views over the Southern Uplands, lead to the 18th-century market town of Castle Douglas, Dumfries, where Robert Burns spent his final years, and the old mill towns and ruined abbeys of the Scottish Borders, following the River Tweed past Sir Walter Scott's Abbotsford and a plethora of Mary Queen of Scots history. The trail finishes in the harbour town of Eyemouth, and is set to open in time for the UCI Cycling World Championships, running in Glasgow and around Scotland in August.

"The south of Scotland has a lot to offer, from Abbotsford and the abbeys to cultural events like book festivals," says Markus Stitz, of Bikepacking Scotland. "The enthusiasm of the local people and their hospitality make it a wonderful area to explore."

The south is already well known among mountain bikers for the 72 stanes trail centres dotted around the region. It's hoped that the new route will show that road cycling is just as remarkable.

Stuart Kenny



Cycling Map micro site

- Developed by Sustrans Scotland with VisitScotland in 2018
- Highlight routes on or close to the National Cycle Network
- **250K+** page views in 2022, **107K** page views in 2021. **2023...?**
- Offers 7 long distance routes and 59 downloadable day trips
- 30 day trip routes are family-friendly
- Kirkpatrick coast-to-coast route to be added in early July 2023
- Creating active travel World Championships venue routes
- Hoping to map some Championship routes - road races, para-cycling
- Driving landings to the map with spring campaign and owned activity



Building the legacy - Partnerships

Objectives

- Drive landings to **visitscotland.com/cyclingroutes**
- Raise awareness of Scotland as a leading cycling tourism destination, leveraging **Scotland. Made for Cycling.**
- Highlight key parts of the **National Cycle Network**
- Help raise the profile of the **UCI Cycling World Championships**
- Highlight **accessibility, responsible tourism** and **wellness benefits**

Audiences

- Phase 1: Encourage 40 - 60 to be more active
- Phase 2: Family cycling – drive to family-friendly day trip routes on map

Timeline

- March to mid-May



What's next?

- Develop a cycling tourism strategic legacy framework
- Influence and support infrastructure investment
- Continue to tell Scotland's cycling story
- Promote Scotland as a leading cycling tourism destination

Any questions?

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advice for businesses

Evolving the *Cyclists' Welcome Scheme* into the **Cycling Tourism Industry Guide**.

The Guide provides useful information on:

- Market insights
 - Visitor insights
 - Growth opportunities
 - Marketing advice
 - Facilities development advice
- [Find the Guide on VisitScotland.org](https://www.visitScotland.org)
 - Consider Quality Assurance
 - Consider your marketing and content - free imagery available
 - Online bookings and distribution options. Webinar on 9 May

1. Practical advice to create a high-quality experience for cyclists

Like all visitors, cyclists need a good Scottish welcome. First impressions are key - make sure you have a friendly, proactive and responsive attitude towards everyone. If you are genuinely enthusiastic about your business, this will rub off on your guests. There are, however, some key products and services that cyclists look for during a visit that need to be available to suit their schedules.

Read our top tips on how to improve the quality of the visitor experience for all cyclists and increase business profitability as a result.

Open all

Why do cycling visitors come to Scotland and what do they look for?	▼
What's Quality Assurance and how can it help my business?	▼
Practical advice for accommodation providers	▼
Practical advice for visitor attractions	▼
Practical advice for food and drink establishments	▼
How do I add value to a cyclist's visitor experience?	▼

2. Market insights from the latest cycling tourism research

We've recently conducted our "Scotland: Made for cycling" research paper and some of the key findings were:

Key statistics - Sustainable and inclusive tourism



Pent-up demand

From international markets due to favourable exchange rates



Value-for-money

"Money can't buy experiences" or "cost savings" are key drivers



Over 2.3 billion

Cycle tourism trips taking place in Europe, every year



£37 billion

The entire total value of cycle tourism trips in Europe



Domestic tourism

300,000 road cycling trips, 1.3 million overnight stays and £154 million for the Scottish economy



£14 million

The value of a further 500,000 cycling day trips



£105 million

The economic value of Scotland's maximum biking order



0.5% and 0.8%

Scotland's share of Europe's volume and value of trips and spend

Adding value & Being practical

Accommodation providers

- Proper lockable bike storage
- Bike wash down facilities + clothes drying facilities
- Welcoming hot cuppa!
- Take away breakfast
- Local route guides
- Electric bike chargers
- Wi-fi
- If any known road closures
- Consider joining the Quality Assurance scheme

Attraction providers

- Stock guidebooks and trail maps
- Consider shoe racks
- Lockable bike storage
- Food and drink to go
- Weather forecasts
- Charging points
- Visitor attraction quality assurance scheme

Food & Drink providers

- Free water top ups
- Stock electrolyte drinks
- High energy bars/ bananas
- Contactless payments
- Lockable storage
- Cake!
- Taste Our Best quality assurance scheme

Product development

