



DIRECTORATE GENERAL FOR INTERNAL POLICIES  
POLICY DEPARTMENT B: STRUCTURAL AND COHESION POLICIES

TRANSPORT AND TOURISM

# THE EUROPEAN CYCLE ROUTE NETWORK EUROVELO

## EXECUTIVE SUMMARY

### **Abstract**

This update of the 2009 report evaluates the challenges and opportunities of developing a cycle tourism network across Europe. It focuses on EuroVelo, a network of 14 long distance routes managed by the European Cyclists' Federation which is being developed in different countries by a wide range of partners. The study reviews the market for cycle tourism and presents a model of demand for EuroVelo. It also evaluates the recent developments on the Iron Curtain Trail.

This document was requested by the European Parliament's Committee on Transport and Tourism.

## **AUTHORS**

*Institute of Transport and Tourism, University of Central Lancashire, UK - Richard Weston, Nick Davies, Les Lumsdon\*, Peter McGrath\**

*Centre for Sustainable Transport and Tourism, NHTV Breda University of Applied Sciences, Netherlands - Paul Peeters, Eke Eijgelaar, Peter Piket\**

## **RESPONSIBLE ADMINISTRATOR**

Marc Thomas  
Policy Department B: Structural and Cohesion Policies  
European Parliament  
B-1047 Brussels  
E-mail: [poldep-cohesion@europarl.europa.eu](mailto:poldep-cohesion@europarl.europa.eu)

## **EDITORIAL ASSISTANCE**

Nóra Révész

## **LINGUISTIC VERSIONS**

Original: EN.

Executive summary: BG, CS, DA, DE, EL, EN, ES, ET, FI, FR, HU, IT, LT, LV, MT, NL, PL, PT, RO, SK, SL, SV.

## **ABOUT THE PUBLISHER**

To contact the Policy Department or to subscribe to its monthly newsletter please write to: [poldep-cohesion@europarl.europa.eu](mailto:poldep-cohesion@europarl.europa.eu)

Manuscript completed in August, 2012.  
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This document is available on the Internet at:  
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\* 2009 report only.

## EXECUTIVE SUMMARY

### Background

This study focuses specifically on travel between places by bicycle for leisure purposes. It provides an overview of the cycle tourism market across Europe and seeks to evaluate the potential for development.

The reports concentrates on EuroVelo, a European cycle route network which seeks to offer a sustainable Trans-European Network. This network is managed by the European Cyclists' Federation which is working towards the goal of all routes offering high standards of design, signage and promotion throughout Europe. The report assesses whether or not this network could enhance the overall transport and tourism offering in Europe.

The study also addresses an idea to develop a new long distance trail which offers the potential to bring three core themes of culture, heritage and nature to a new market. The Iron Curtain Trail seeks to offer opportunities to discover over 20 countries, including 14 EU Member States, on the 8,900 km route from the Barents Sea to the Black Sea. It is a very good example of the potential of cross border tourism in that many visitors will choose to cycle between 2 cities (and across borders) as part of their holiday.

### Cycle Tourism Market

France is by far the most important destination for tour operators followed by Austria while the main outbound markets are Germany and the UK. The requirement of a continuous, safe, pleasant route with good signage is universal.

There are no firm trends reported in the literature. Cycle tourism is not recorded in Eurostat tourism statistics nor is it featured in other general reviews of domestic or international tourism. It is important to note that the growth of cycle tourism, both in terms of provision and market demand, is uneven across Europe. In countries such as Austria, Belgium, Denmark, France, Germany, Switzerland and The Netherlands, cycle tourism is important. A repeat of the 2009 survey found that most experts now think that the market for cycle tourism in their countries was increasing (compared to 'static' previously) despite the current economic climate.

There is no definitive response to the question as to the value of cycle tourism in the EU. A model has been developed that uses fractions of existing tourism flows within Europe to estimate the value and volume of cycle tourism. There are an estimated 2,295 million cycle tourism trips in Europe with a value in excess of €44 billion per annum. This is the estimated sum total of domestic and international cycle tourism trips. The number of cycle overnight tourists is 20.4 million spending around €9 billion annually.

### EuroVelo Economic Impact

An evaluation of the EuroVelo network has also been made. The study concludes that it is currently not an important transport or tourism network but that it has considerable potential if developed. A model has been generated to assess the economic impact of EuroVelo if developed as a European transport and tourism network. It is estimated that 60 million trips will generate a total of €7 billion of direct revenue that can be attributed to EuroVelo as a cycle tourism product.

## Environmental Impacts

The act of cycling itself is almost emission free. Most cyclists start cycling their day trip directly from their front door but, in some cases, motorised transport modes are used to reach the destination. These transport modes do affect air quality en route and add to pollution and congestion at destinations. The study finds that on average, as cyclists tend to use more environmentally friendly transport and travel shorter distances to their destination, the emissions per cycle tourism holiday are much less than other holidays.

## Public Transport Integration

As with all holiday travel there is a need for integration between modes of transport en route to the destination. The position regarding the carriage of cycles is problematic from a cycle tourist point of view as train operators in different countries have varying approaches. This is improving slowly, notably on the French TGV, German ICE and Austrian Railjet high-speed services, which are either introducing cycle carrying capacity or are committed to do so over the next few years. Hopefully small incremental improvements will allow the demand for rail/cycle tourism to gradually develop encouraging further cycle carrying capacity to be introduced.

There are a small number of cyclists who travel by coach/bus across Europe. There are limitations to carriage of cycles; they have to be packaged and in a similar manner to air travel are carried in the luggage sections. In addition, the coach and cycle offer is currently very limited.

The provision for cycles on ferries is an important element in making a European wide cycle tourism network. A small-scale electronic survey was carried out by the research team. The findings indicate that ferries have a willingness and capacity to carry large numbers of cycle tourists but most companies do not market this in any way.

## Iron Curtain Trail (ICT)

The Iron Curtain divided East and West Europe for the best part of 50 year in the last century and there are reminders of its existence throughout its length in terms of monuments and local interpretation. When complete the ICT would offer a continuous route from the Barents Sea to the Black Sea passing through 20 European countries.

The potential demand and revenues for the Iron Curtain Trail has been estimated at 1 million holiday trips and 5.3 million day trips and a total of €521 million in direct revenues annually. A key factor is that many regional economies could gain additional tourism in areas where economic development has been hampered for decades due to the Iron Curtain, a phenomenon known as 'Zonenrandgebiete' in Germany.

## Conclusions

Cycle tourists are motivated by a mix of elements but especially nature and the opportunity to relax from everyday life. Whilst the nature of cycle tourism fits well with current EU policies on sustainable tourism, there are a number of barriers to the development, for example the lack of interface between transport modes and the lack of presence in the market. In terms of sustainable development the train and cycle package is the most important. Carrying a bicycle by rail is relatively inexpensive, but not always possible and in many cases not easy. Another barrier is the lack of quality long distance cycle routes and

networks in many countries which offer a real presence in the tourism market place. There is also low involvement of tour operators and tourism providers in cycle tourism.

The evidence assessed in this study indicates that cycle tourists bring major benefits to localities which currently do not enjoy mainstream tourism development. The cycle tourist delivers a similar level of spend to other visitors.

EuroVelo is presently not a major tourism asset in most countries for it has not been developed sufficiently to offer choice of destination or a strong brand identity. The development of a network has considerable potential, but will require commitment and forward planning on behalf of the managing group. Initially, it needs a firm resource base on which to upgrade and develop the entire network within this decade.

## **Recommendations**

In summary the following 6 key recommendations are made:

1. That EuroVelo is incorporated into the TEN-T programme.
2. That funds be made available for coordination and marketing of the EuroVelo network.
3. That cycle tourism in general and EuroVelo specifically should be monitored bi-annually.
4. That the EU should designate an individual to take the lead with regard to cycling.
5. That there should be a more detailed appraisal of the carriage of bicycles on public transport, specifically on long distance trains.
6. That there is a strong case to continue development of the Iron Curtain Trail.