State of the Cycling Tour Operators Industry (2024)

In Europe and Beyond

ADVENTURE TRAVEL TRADE ASSOCIATION

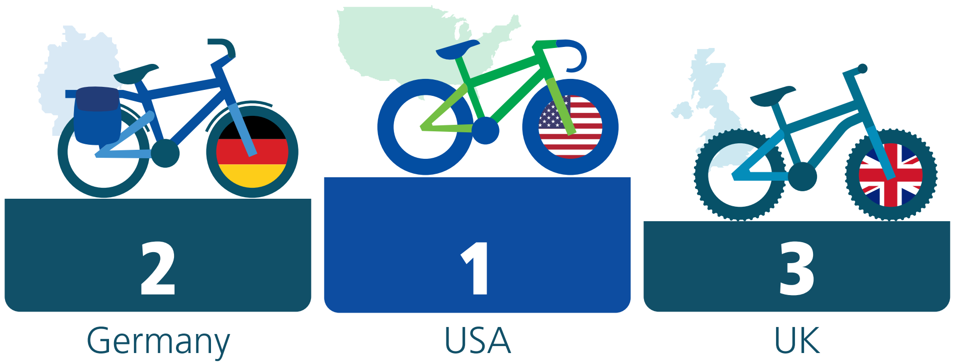
CYCLESUMMIT

ECF EUROPEAN CYCLISTS' FEDERATION

EuroVelo the European cycle route network

TOP 3 CYCLING TOUR DESTINATIONS

TOP 3 SOURCE MARKETS



SURVEY RESPONDENTS

245 respondents

66% both sell and operate cycling tours

69% are from Europe

KEY FINDINGS

1. **A large diversity of cycling destinations shows universal appeal.** Even though 69% of survey respondents are headquartered in Europe, a wide variety of destinations around the world are mentioned as currently popular or expected to increase in popularity in the near future. When considering all respondents, the USA is the most popular source market overall, followed by Germany, the UK, the Netherlands, and France.

2. **The cycling market is increasing in depth and breadth as well as volume.** Cycling is consistently highlighted as a trending activity in adventure travel industry research and conversations. This includes increasing numbers of guests and revenue, with 88% expecting the same or higher guest volume, and 86% of respondents expecting the same or higher revenue in 2024 over 2023, and also increases in various disciplines. Touring cycling dominates the market in Europe, but mountain biking is the biggest discipline outside of Europe, and 64% of tour operators have at least 25% of their clients using e-bikes. 98% of tour operators face clients needing bicycle rental services.

3 **Inflation and marketing to new customers are primary internal challenges.** 62% of respondents highlight inflation as a major challenge to their business, and 50% struggle with marketing to new customers. European operators in particular (46%) identify seasonality as an area of concern, and non-European operators are looking for better software solutions (27%).

4 **Accommodation offers are lacking in all areas of the world.** Regarding external business challenges, finding appropriate accommodation for guests (availability, quality, price, flexibility, etc.) is the main challenge for both European (54%) and non-European operators (39%). Respondents around the globe also face itinerary concerns such as safety and logistics around road quality and sharing, and general lack of infrastructure.

MAIN CLIENT PROFILE OF EUROPEAN CYCLING TOURS

from

Germany

128 €/day (x7 days)

Touring bike

Self-guided **Individual**

MAIN TREND IN CYCLING TOURS

E-bikes

(51% of respondents)

MAIN CHALLENGE OF CYCLING TOUR OPERATORS

Inflation

(62% of respondents)

MAIN CLIENT PROFILE OF NON-EUROPEAN CYCLING TOURS

from

USA

207 €/day (x7 days)

Mountain bike

Guided **Group**

INTRODUCTION

One clear trend in 2024 around the globe is that cycling tourism is booming. To better understand the dynamics of this industry, the Adventure Travel Trade Association, CycleSummit, and the European Cyclists' Federation-EuroVelo joined forces to launch the first independent online survey of cycling tour operators. Organised cycling tours represent a small segment of cycling tourism in general as most cycling tourists plan their trips independently[1]. However, cycling tour operators are key players of the cycling tourism industry with direct access to feedback from their clients and knowledge of new trends. This report includes numerous insights and will hopefully support the growth of organised cycling tours and the growth of cycling tourism in general as a sustainable and responsible form of tourism.

ABOUT THE SURVEY AND ITS INITIATORS

From February to April 2024, 245 cycling tour operators from Europe and beyond contributed to an online survey. All contributions have been used confidentially and for aggregated analysis. The results of the survey are available for all with this report and ready to be brought to decision-makers, companies, and/or authorities to advocate for more support for cycling tourism.

Methodology

Responses were collected from 19 February through 16 April 2024. Responses were recruited by all three partner organisations. After cleaning and removing duplicates, 245 qualified tour operators answered at least one question in the survey. 181 of these 245 tour operators answered all questions in the survey.

Adventure Travel Trade Association

Established in 1990, the Adventure Travel Trade Association is the largest global network of adventure travel leaders. Our community is made up of ~30,000 individual guides, tour operators, lodges, travel advisors, tourism boards, destination marketing and management organizations, outdoor educators, gear companies and travel media who share a belief and commitment to sustainable tourism. The connections and creativity of this vibrant community come together both virtually and in person to create and deliver the solutions that propel our businesses and our communities toward a responsible and profitable future. www.adventuretravel.biz

CycleSummit

The CycleSummit is a global network for cycling tour operators, providing a platform for international professionals to connect, collaborate, and explore new opportunities in the cycling tourism industry. Since 2009, the summit has been fostering connections among cycling professionals. The annual event also features destinations showcasing their cycling products, along with various social activities that promote networking and highlight the region where it takes place. www.cyclesummit.com

European Cyclists' Federation - EuroVelo

ECF is a Brussels-based non-profit association dedicated to achieving more and better cycling for all, both for transportation and leisure. EuroVelo, the European cycle route network, is an initiative of the European Cyclists' Federation developed by national and regional partners. It is a network of long-distance cycle routes that cross and connect Europe. The routes can be used by cycle tourists, as well as by local people making daily journeys. www.ecf.com / www.eurovelo.com

1. ADFC bicycle travel analysis 2023 indicated that 90,9% of German cycling tourists organised their trip entirely independently in 2022, 3% partially organised by a Tour Operator, and 6% entirely organised by a Tour Operator.

WHO ANSWERED THE CYCLING TOUR OPERATORS SURVEY?

245 cycling tour operators took part in the first global survey ever launched by three expert organisations: Adventure Travel Trade Association (ATTA), CycleSummit and European Cyclists' Federation (ECF).

Most respondents both sell and operate cycling tours (66%) even if some of them only operate (21%) or only sell (13%). 66% of them are cycling specialists, doing only (25%) or mainly (41%) cycling tours, showing that cycling tourism is a sustainable business model of its own. But 34% of respondents offer cycling tours not as their main business, showing that cycling can be integrated in broader tourism businesses.

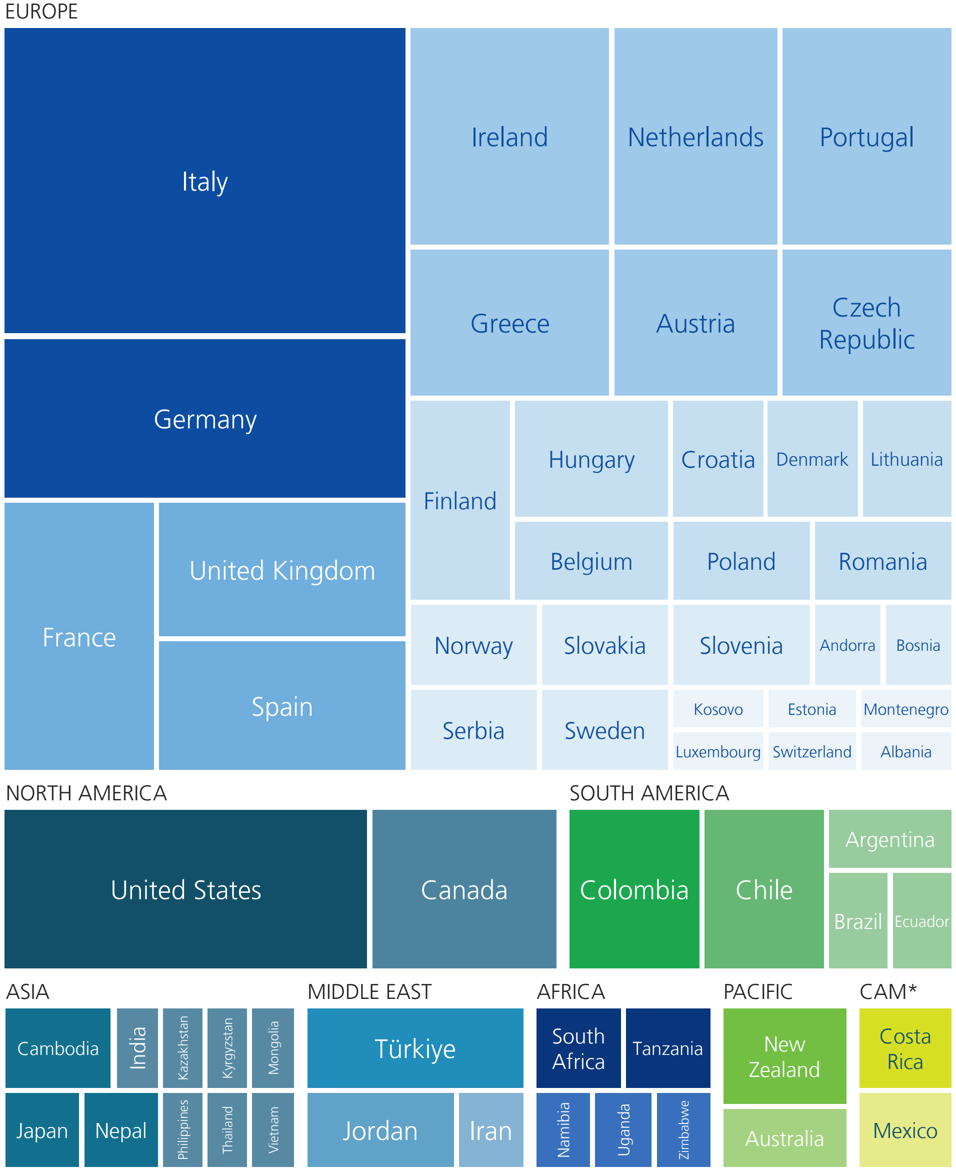
More than 2/3 of respondents are from Europe (69%), with smaller numbers from the rest of the world. This reflects the popularity of cycling tourism products in Europe[2].

Where are the respondents based?

The size of cycling tour operators answering the survey is relatively modest but also heterogeneous with 81% having 10 or fewer full-staff members in low season (76% in high season), and only 4% having 50 or more. They serve a median of 300 customers a year but an average of 1,200+. The difference between the median and the average is caused by a small number of larger companies concentrating significantly higher customer volumes than the majority of the sample, with 18 respondents to the survey having between 3,000 and 21,000 customers a year.

COUNTRY WHERE THE RESPONDENT'S ORGANISATION IS HEADQUARTERED

ALL N=245 / EUROPEAN N=169 / NON-EUROPEAN N=76



*Central America / Caribbean

2. This result can be due in part to the profile of tour operators the partner organisations of this survey were able to reach, especially CycleSummit and European Cyclists' Federation, having a stronger European focus.

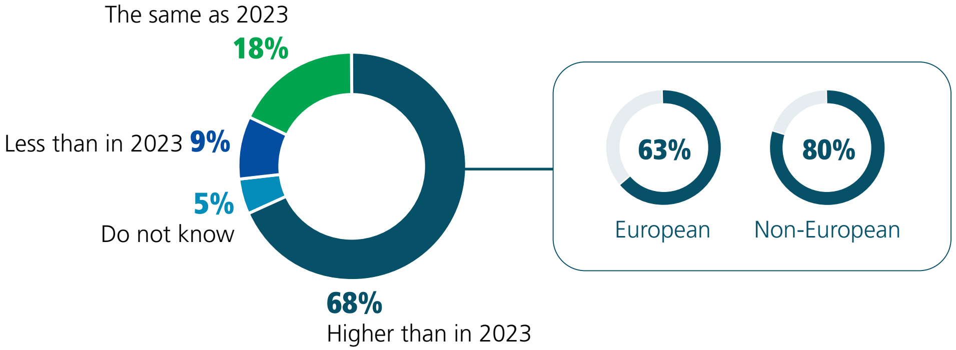
CYCLING TOUR OPERATORS' BUSINESS IS GROWING

The revenues of cycling tour operators grew for the majority of respondents in 2023 and is expected to grow even more in 2024. 58% of cycling tour operators had higher revenue in 2023 than in 2019, 12% had similar revenue and 20% lower revenue in 2023 than in 2019. For 2024, the trend looks again positive with 68% of respondents expecting higher revenue than in 2023 (80% non-European and 63% Europeans).

Many respondents served more clients in 2023 than in 2019 (48%), showing a clear dynamic post Covid-19, with differences in Europe (50%) and outside Europe (43%). But still 24% served fewer clients in 2023 than in 2019. The trend is more positive when looking at expectations for 2024 with 66% expecting more than in 2023 (75% outside of Europe and 63% in Europe) and 22% same volume than in 2023.

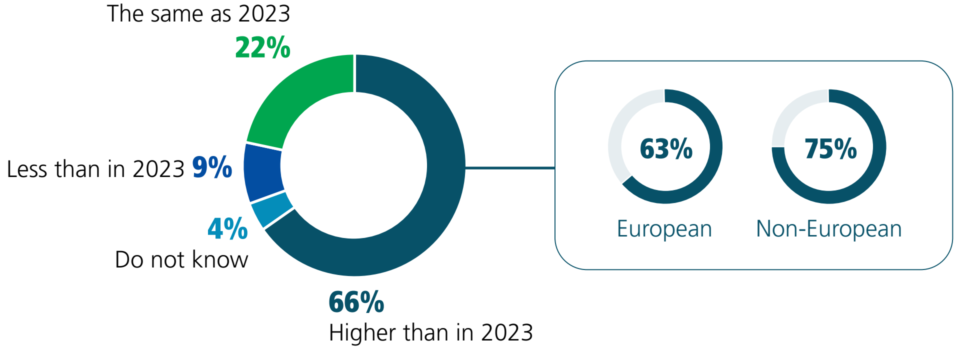
EXPECTED REVENUE IN 2024 COMPARED TO 2023

ALL N=187 / EUROPEAN N=131 / NON-EUROPEAN N=56



EXPECTED NUMBER OF CYCLING CLIENTS IN 2024 COMPARED TO 2023

ALL N=186 / EUROPEAN N=131 / NON-EUROPEAN N=55



WHAT TYPE OF BICYCLE DO CYCLING TOURS' CLIENTS USE?

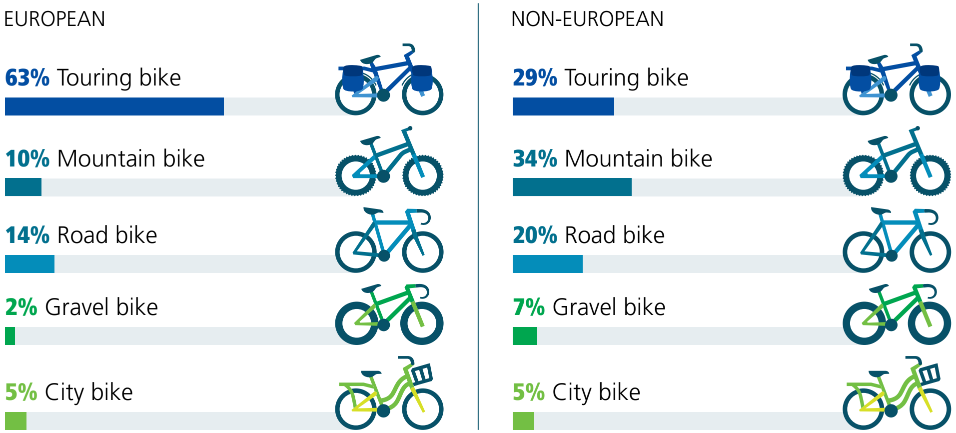
The type of bicycle used during a cycling tour tells a lot about the intensity of use from soft leisure to sport cycling. It also impacts the type of itineraries that will be offered during the tour. Touring cycling tours are the main category sold or operated by our respondents (53%) with significant differences between European and non-European tour operators[3]. Touring is more popular in Europe with 63%, followed by road bikes (14%) and mountain bikes (10%). On the other hand, mountain biking is more popular outside of Europe (34%), followed by touring (29%) and road biking (20%). City bike tours are the main category for 5% of our respondents and are a specific segment particularly relevant in urban areas. Tour operators offering mainly gravel tours represent 3% of the respondents (7% outside Europe and 2% in Europe). Respondents who selected "other" reported using fat bikes, e-bikes, and an even combination of multiple types of tours[4].

3. This result can be due in part to the profile of tour operators the partner organisations of this survey were able to reach, especially CycleSummit and European Cyclists' Federation, having a stronger 'touring bike' focus.

4. Respondents were asked to share what was the main tour type they sell or operate, preventing them from sharing information on the diversity of tour types they may sell or operate. But only a few respondents shared in "other" that they sell or operate an even combination of multiple types of tours.

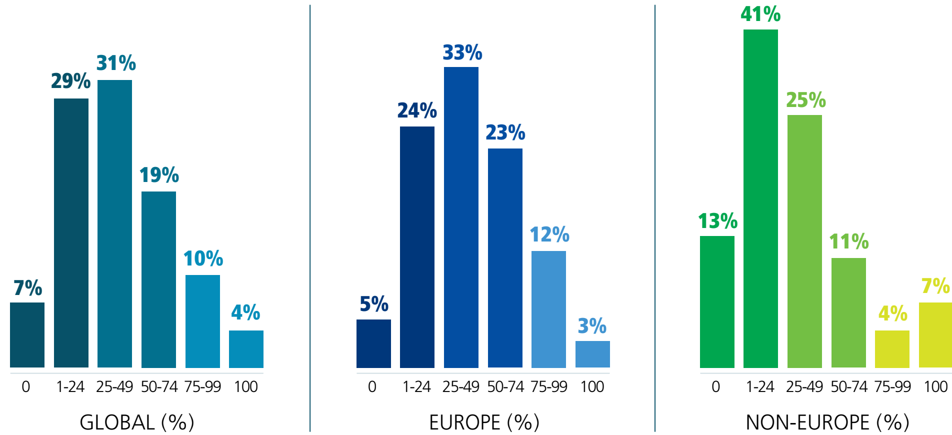
TYPE OF BICYCLE USED BY CYCLING TOURS' CLIENTS

ALL N=186 / EUROPEAN N=130 / NON-EUROPEAN N=56



PERCENTAGE OF CUSTOMERS CHOOSING TO USE E-BIKES

ALL N=186 / EUROPEAN N=130 / NON-EUROPEAN N=56



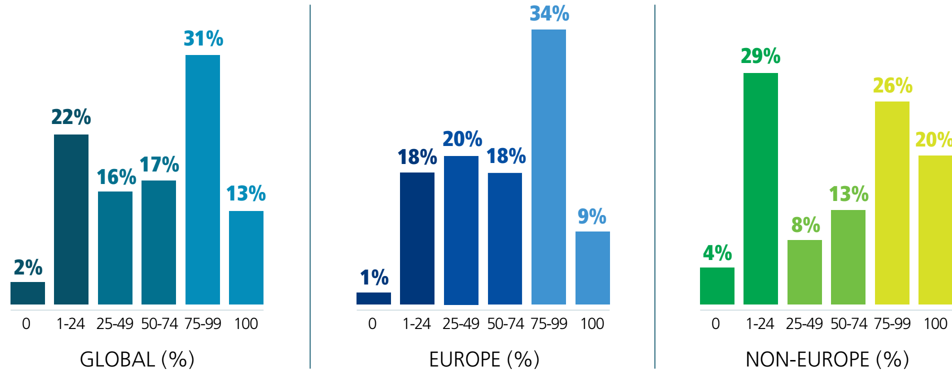
E-bikes have clearly penetrated the market very quickly since their appearance around 10-15 years ago, especially in Europe, and most tour operators in the survey offer both regular and e-bikes. 64% of respondents have at least 25% of their clients using e-bikes. This average conceals a big difference between European operators, where the corresponding figure is 72%, and non-European operators, where only 46% have at least one quarter of their clients using e-bikes. 33% of respondents already have more than 50% of their clients using e-bikes (38% in Europe and 22% outside of Europe). There are slightly more respondents having no e-bike users amongst their clients (7%) than respondents offering only e-bikes (4%).

Bicycle rental is a service highly requested by cycling tour operator customers as 61% of respondents report that the majority of their customers rent bikes. Most cycling tour operators seem to adapt to their clients' needs with only 2% not having any clients needing bike rental and 13% having all of their clients needing it.

29% of respondents do not own any bicycles and likely partner with other companies to supply bicycle rental services. For the remaining 71% of respondents whose organisations do own bicycles, 50 is the median number of bikes they own, with a median fleet renewal frequency of four years.

PERCENTAGE OF RESPONDENTS' CUSTOMERS NEEDING BICYCLE RENTAL SERVICES

ALL N=186 / EUROPEAN N=130 / NON-EUROPEAN N=56



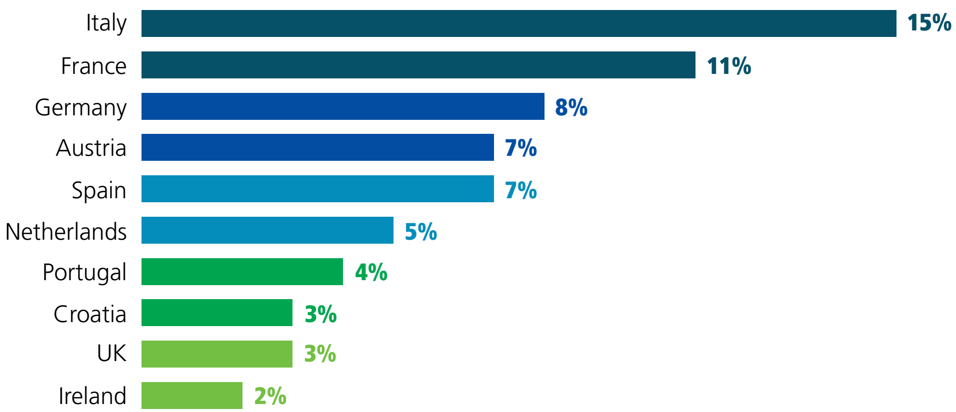
CYCLING TOUR OPERATORS MARKET

Italy is the most popular country destination for most respondents (15%), followed by France (11%), Germany (8%), Austria (7%) and Spain (7%). Overall, 65 country destinations were quoted as "most popular destination countries among your tours" by respondents, showing how diverse the destinations of cycling tour operators are. A few respondents also expressed that it was not possible for them to identify only one most popular country destination. This shows the diversity of cycling tourism offers and its potential for future growth without affecting overtourism.

When focusing on regions, respondents also quoted a large diversity of destinations (198 answers overall). When clustering answers, some destinations arise with around thirty quotes: the Iberic peninsula, the Danube valley and Tuscany. Also quoted around twenty times: the Adriatic region, the Alps, the Benelux countries as well as Britain and Ireland.

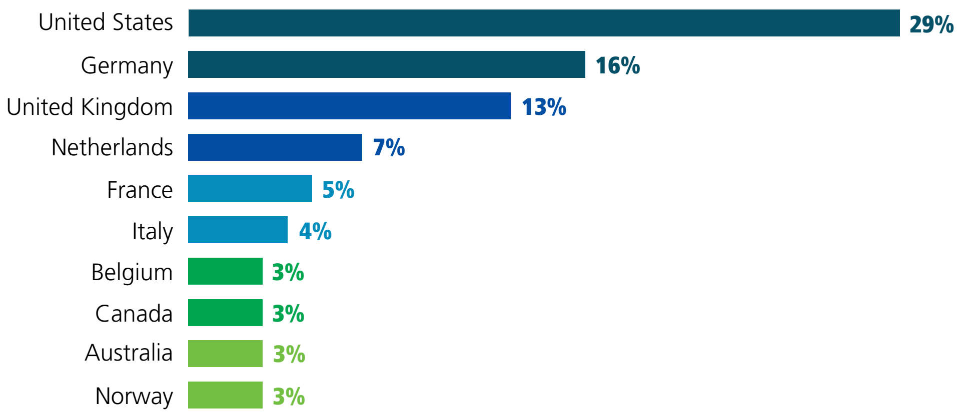
MOST POPULAR DESTINATION/HOST COUNTRIES AMONG THE TOURS OF RESPONDENTS

ALL N=199



MOST POPULAR SOURCE COUNTRIES AMONG THE TOURS OF RESPONDENTS

ALL N=199



Cycling tour operators were also asked which cycle routes are most popular along their tours resulting in many different destinations with the most quoted being Danube, Loire and EuroVelo, around ten times each (158 answers overall).

29% of respondents have the majority of their clients coming from the USA, followed by Germany (16%), the UK (13%), the Netherlands (7%) and France (5%). The trends differ when focusing on European tour operators, where Germany is the most popular source market (21%), followed by the USA (20%) and the UK (14%); versus non-European tour operators, where the USA is the country of origin of most clients (51%).

Seven days is the median length of the most popular tour of our respondents, both for European and non-European operators. In Europe, medium-length tours of 4-8 days largely dominate the market (most popular tour length for 78% of European vs. 50% for non-

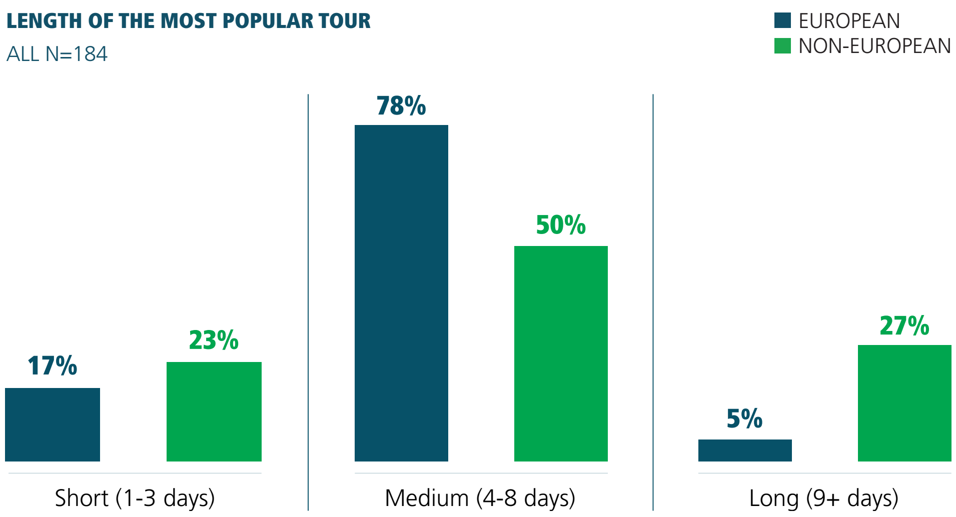
European operators), while longer tours of 9 days and more have a relatively higher importance outside of Europe (most popular tour length for 27% of non-European vs. 5% for European operators). The median price of this tour is 936€, so an average of 133€/day. The median average price per day of the respondents' most popular tour is significantly higher outside of Europe (214€) than in Europe (128€/day).

The share of self-guided and guided cycling tours is very much split in half with clear differences between European and non-European respondents. 64% of Europe-based operators reported that a majority of their clients opted for non-guided tours. Outside of Europe, the picture is the opposite. Here, 78% of the operators reported that their clients preferred guided tours; almost half of the respondents did not even offer non-guided tours.

17% of respondents only provide individual cycling tours, and 9% only cycling tours for groups. European respondents have a higher share of individual tours (74% of respondents have at least half of their tours catered for individuals), whereas non-European respondents cater more to groups (58% have 49% or less of their tours catering to individuals).

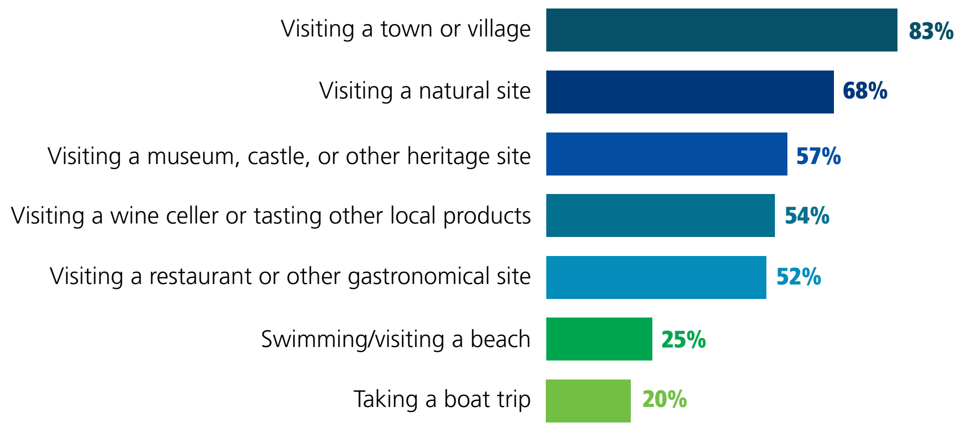
LENGTH OF THE MOST POPULAR TOUR

ALL N=184



MOST POPULAR ACTIVITIES AMONGST CYCLING TOUR CLIENTS WHILE ON TOURS

ALL N=182



Standard to upscale accommodations are the preferred choice for cycling tours, with 74% of respondents mainly using 3* or higher hotels for their guests.

Cycling tours are not only about cycling and do include other activities. Most popular activities on tours include visiting a town or village (83%), a natural site (68%), a museum, castle or other heritage site (57%), but also gastronomy visits and water related activities like swimming and boat trips. There are no significant differences between activities reported by European and non-European operators.

CHALLENGES & OPPORTUNITIES OF CYCLING TOUR OPERATORS

Internal business challenges

Inflation is the main challenge that cycling tour operators face (62% of respondents), together with marketing to new customers (50% of respondents). The seasonality is a bigger challenge for European respondents (46%), whereas the number of customers is more challenging for non-European tour operators (45%). Staff shortage (32%), lack of support from public bodies (30%) and software solutions (21%) are also challenges identified by respondents. Interestingly software solutions are more of a challenge for non-European (27%) than for European respondents (18%).

External business challenges

Accommodation offers (availability, quality, price, flexibility, etc.) are the main challenge for both European (54%) and non-European (39%). Some respondents also mention that challenges may differ depending on the destination and that climate change may bring unexpected challenges (heat-waves, floods, wildfires, etc).

For European respondents, the main challenges faced with regards to cycling tours are related to the quality of the itineraries (safety - 49%; sharing of paths with all users - 33%; increased traffic with lack of infrastructure - 30%; road quality - 28%) and to the logistical aspects of cycling tours (bike logistics - 33%; transport to and from the itinerary - 29%; bike parking during visits - 23%; lack of bicycle or luggage transport services - 20%).

For non-European respondents, the main challenges are related to the quality of the itineraries (increased traffic with lack of infrastructure - 32%; road quality - 29%; safety - 27%; sharing of paths with all users - 23%;), but also the various fitness levels of clients (32%), and bicycle logistics (25%).

Main opportunities

The main trend in cycling tours is definitely e-bikes according to tour operators (51%). However, our survey demonstrates that the share of regular bicycles amongst cycling tour operator clients still holds strong. Other trends quoted include gravel cycling (15%) and self-guided tours (14%). New destinations and shorter/easier tours are also mentioned by multiple respondents.

When it comes to trending destinations, Europe is expected to remain in favor, especially Italy, Germany, Spain, and Portugal. Regions emerging in popularity include the UK, Slovenia, Slovakia, Hungary, Croatia, Czech Republic, Greece, and other countries in the Eastern Europe area, with the caveat of avoiding ongoing regional conflicts. Türkiye is also on respondents' list of destinations to watch, particularly the Cappadocia region. Respondents from South America highlight Chile, Colombia, and the Andes as destinations with high levels of appeal. Other popular areas around the globe include the Nordic countries (especially Norway and Finland), Japan, New Zealand, and growing interest in Africa.

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CONCLUSION

Cycling has been increasing in popularity for some time, and is expected to continue to flourish in the coming years. Destinations must work to create safe and convenient cycling networks that serve both residents and visitors. Tour operators can consider adding varied cycling itineraries when practical and logistically possible. While inflation and availability of accommodations are challenges for tour operators, marketing new customers is an opportunity especially with the rise of e-bikes broadening the scope of potential users. Both destinations and tour operators have a role to play in educating on the value of cycling as a sustainable experience that allows to explore a destination in a unique way, with a slow pace encouraging a deep interaction with the local culture and environment.

PUBLISHING CREDITS

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EUROVELO DATA HUB

The EuroVelo Data Hub contains updated key figures and useful resources to monitor the growth of the European cycle route network. Below you can find data gathered on EuroVelo network usage, route development and digital statistics. Guidance on how to start monitoring cycle routes, cycling tourism and evaluating its economic impacts can also be found on EuroVelo.com.

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