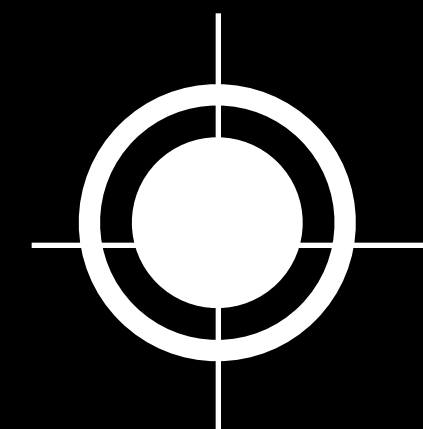


ALPINE BIKING TOURISM

The Future of Cycle Tourism in the Alps

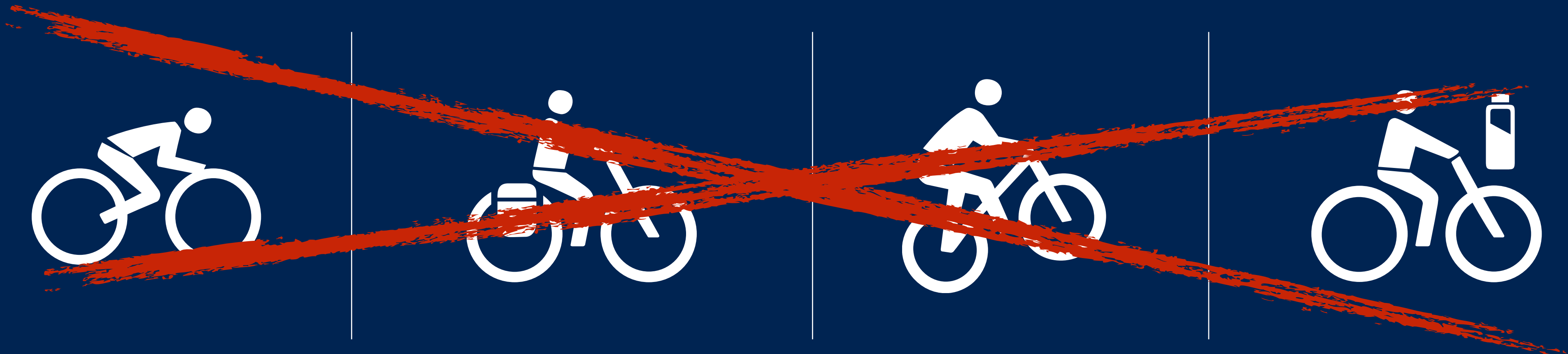
Harald Pechlaner | Manuel Demetz | Anna Scuttari



Yes, there is a great future!

**But a future accompanied
with high market dynamics**

The traditional market segmentation

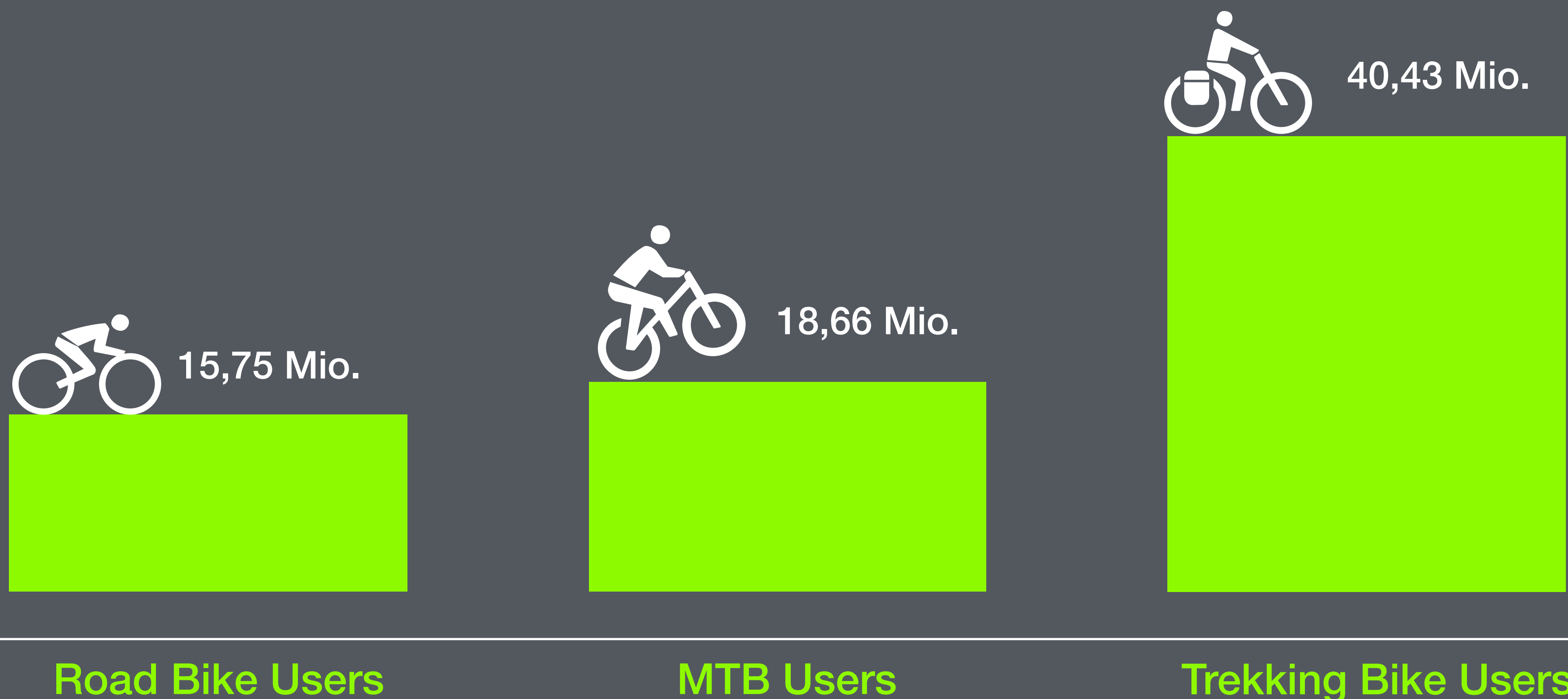


It's all water under the bridge now.

From segments towards use cases, whereby hybridity becomes a central force behind the dynamic in cycling market. Segments will be more fluid.



Some numbers about potential guest (= intensive cyclist) according to the *traditional* segmentation in the main source market for Alpine destinations (e).

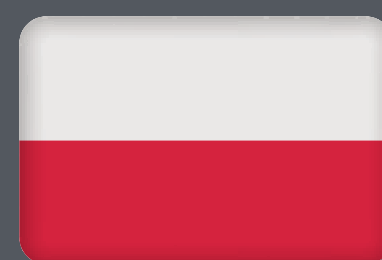
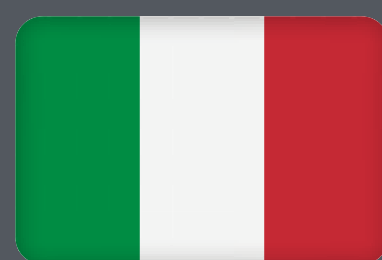
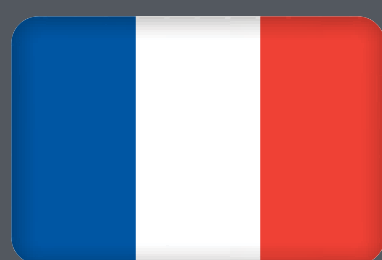
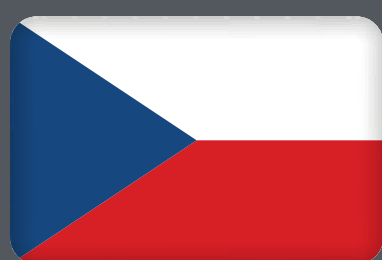
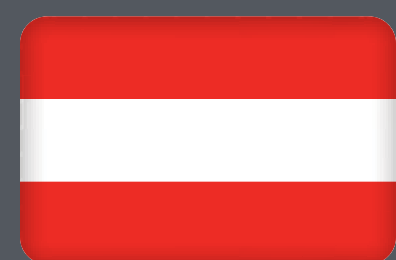
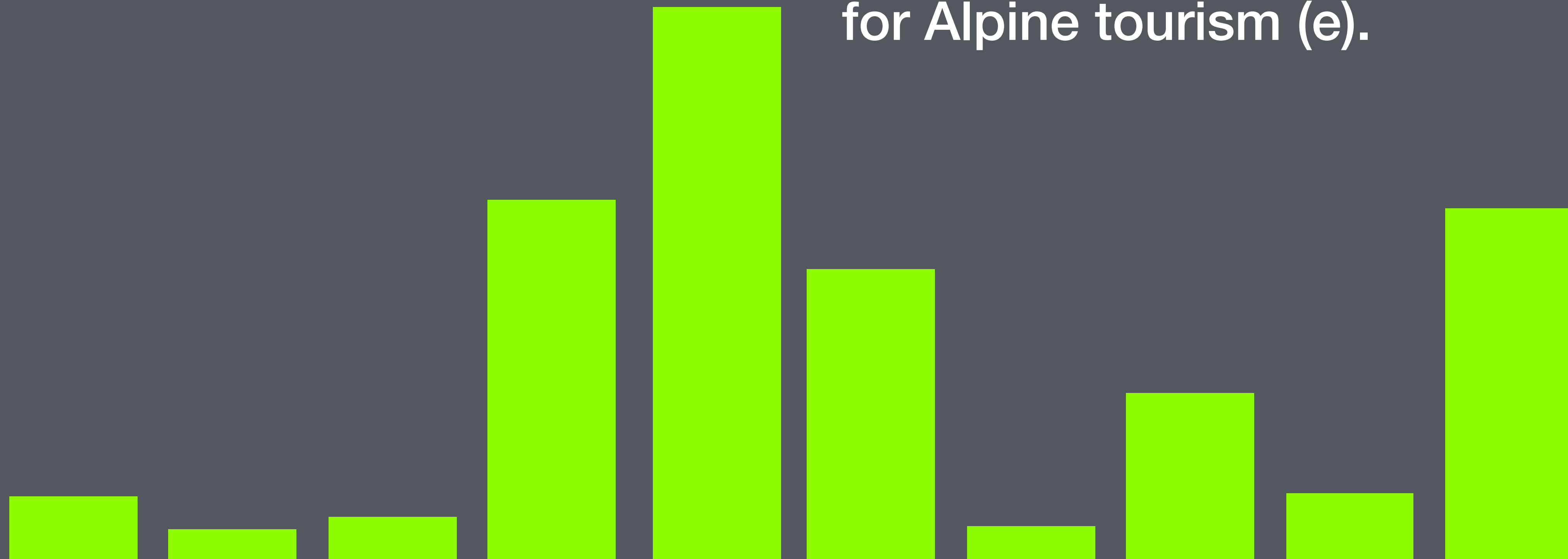


Regular road bike users in the main source markets for Alpine tourism (e).



0,38 Mio. 0,50 Mio. 0,47 Mio. 2,95 Mio. 3,02 Mio. 2,72 Mio. 0,75 Mio. 1,70 Mio. 0,37 Mio. 2,40 Mio.

Regular mountain bike users in the main source markets for Alpine tourism (e).



0,62 Mio.

0,30 Mio.

0,42 Mio.

3,49 Mio.

5,36 Mio.

2,82 Mio.

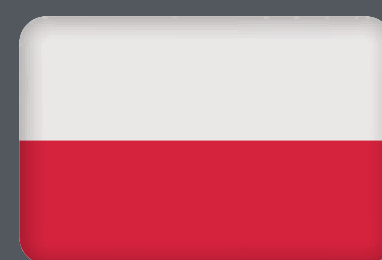
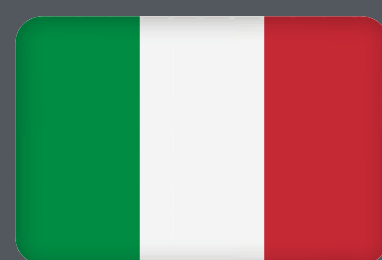
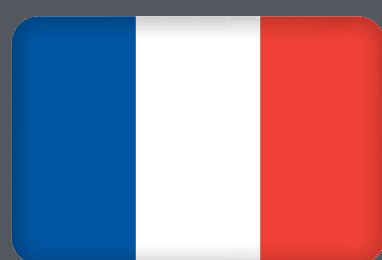
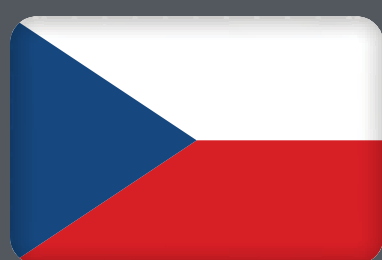
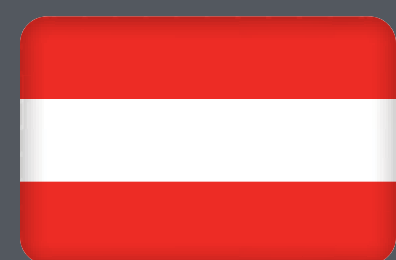
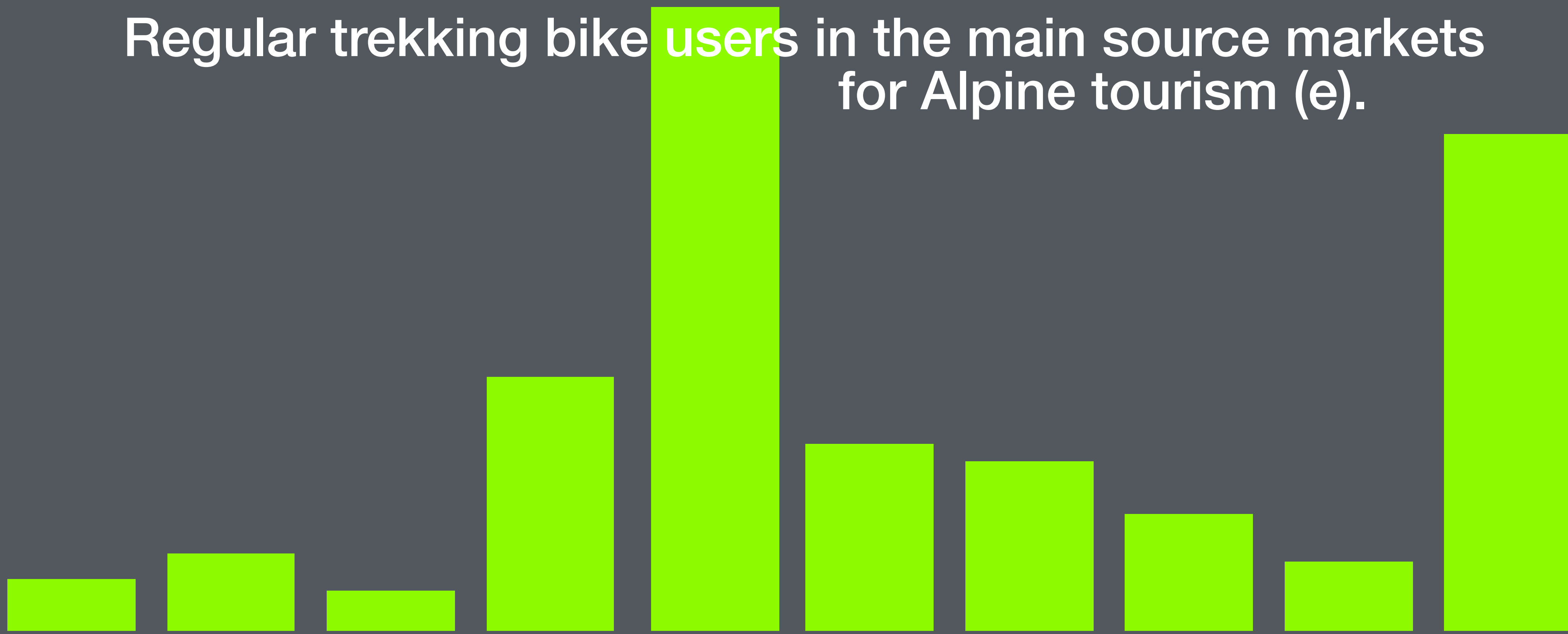
0,33 Mio.

1,62 Mio.

0,65 Mio.

3,41 Mio.

Regular trekking bike users in the main source markets for Alpine tourism (e).



1,01 Mio. 1,50 Mio. 0,78 Mio. 4,92 Mio. 12,08 Mio. 3,63 Mio. 3,27 Mio. 2,27 Mio. 1,35 Mio. 9,62 Mio.

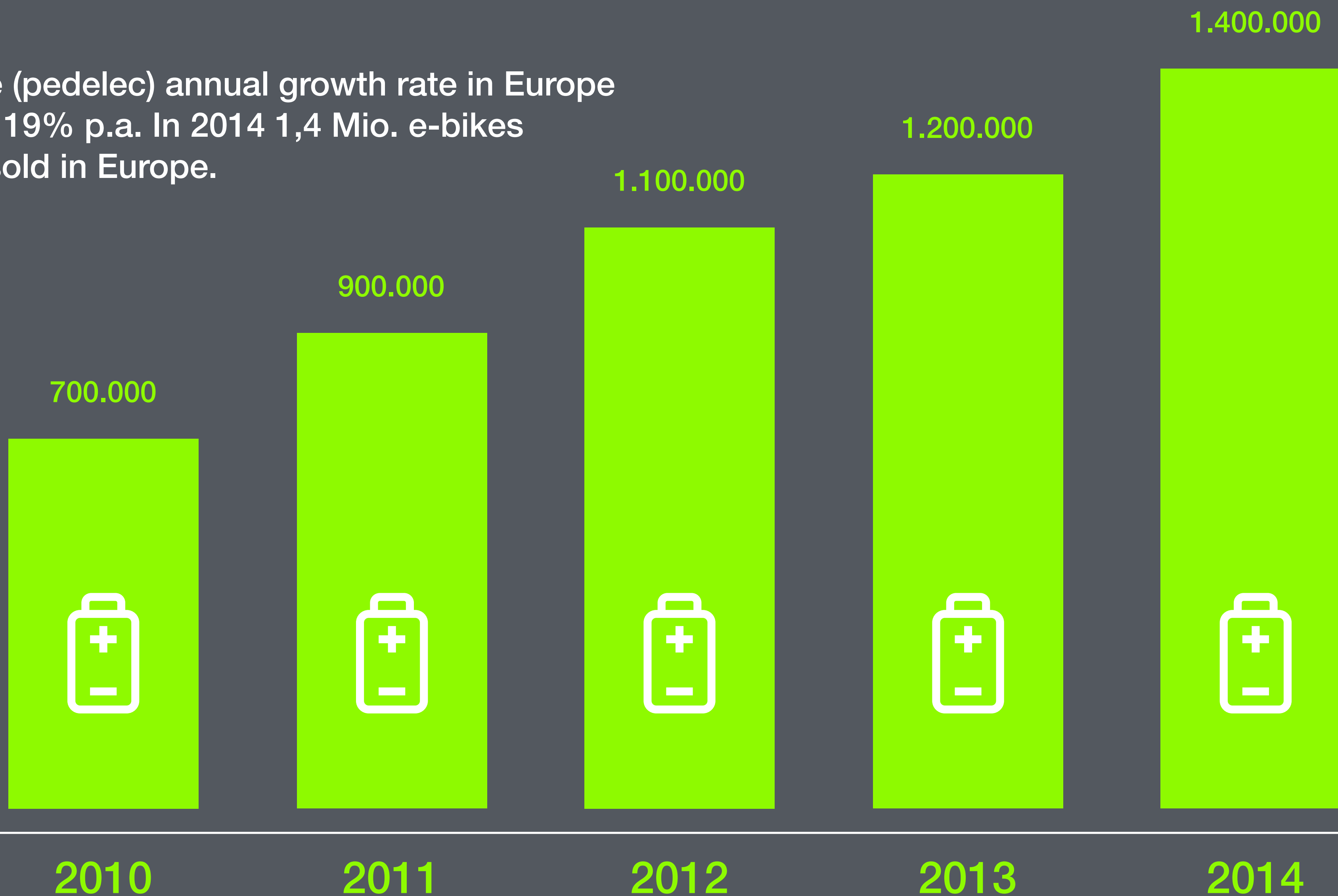


A growth strategy in cycle tourism in the Alps has to focus also on **trekking bikers**. It is and will be the biggest market share.



And for nearly all cycling-segments
e-powered bicycle play an important role.

E-Bike (pedelec) annual growth rate in Europe
nearly 19% p.a. In 2014 1,4 Mio. e-bikes
were sold in Europe.



In Germany 12% of total
sales are referred to e-bikes
in 2014.



2014
bicycle market

In Switzerland 17% of total
sales are referred to e-bikes
in 2014.

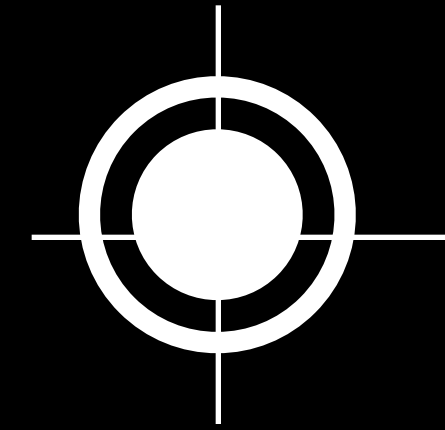


2014
bicycle market



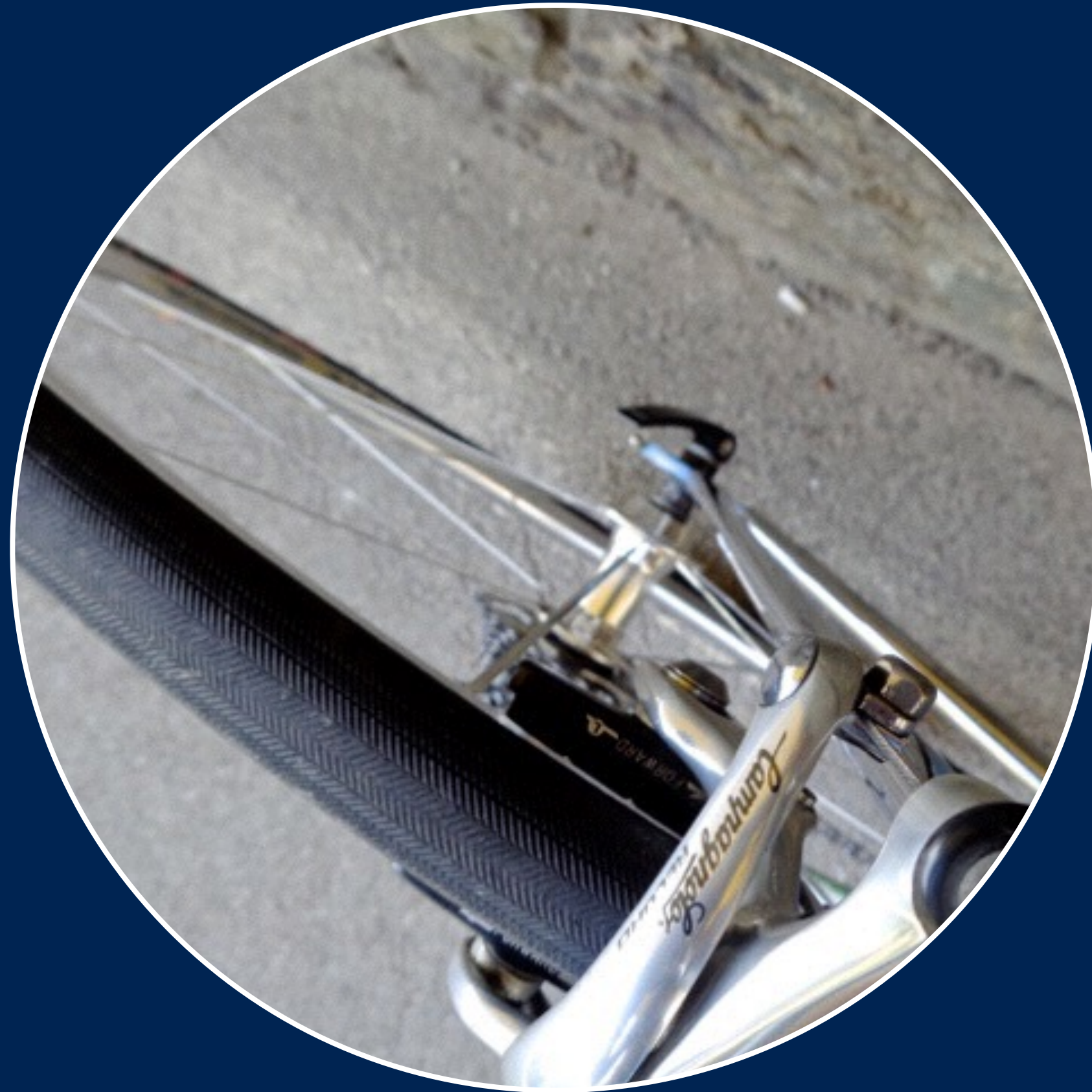
Do e-bikers have special needs and who are they?

We will see.



What type of customer are cycle tourists?

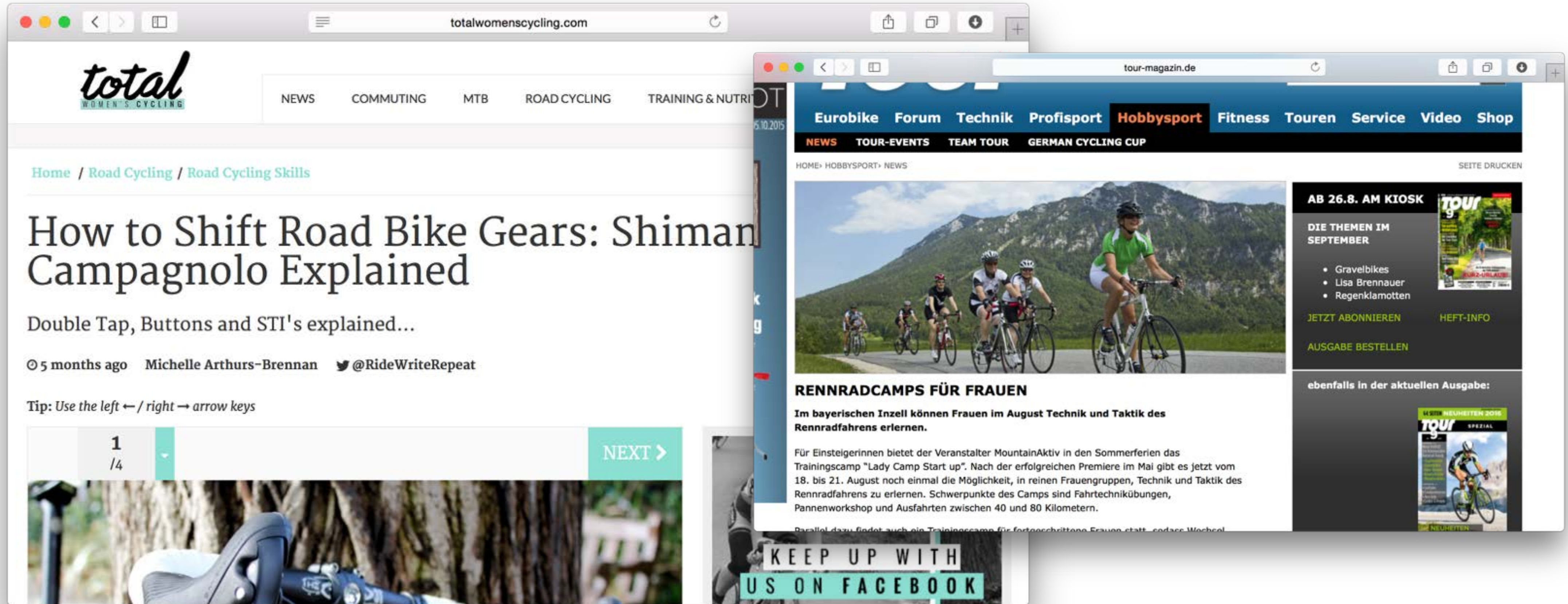
The big deep question.



The road biker



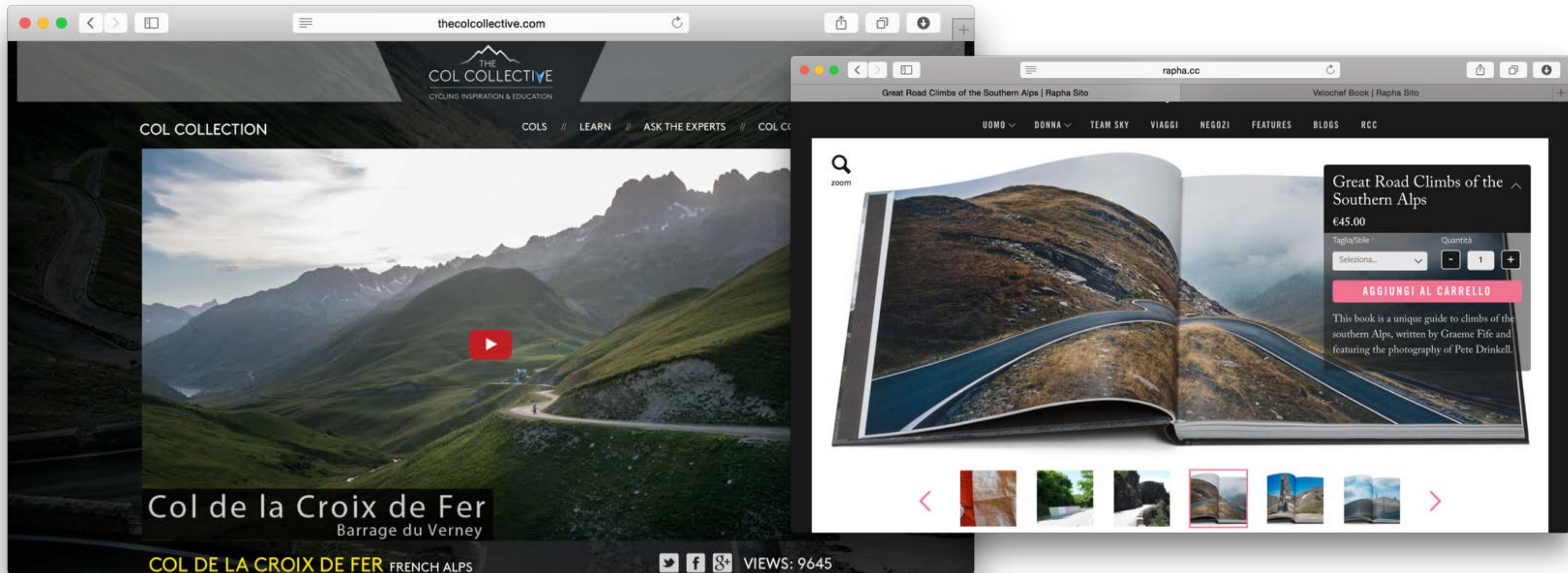
Men's refuge: road biking is a sport and leisure activity that primarily motivates males.



Motivate women to start road biking: dedicated online community portals, specially designed products with a more fashion oriented attitude. Road biking training camps for women are offered.



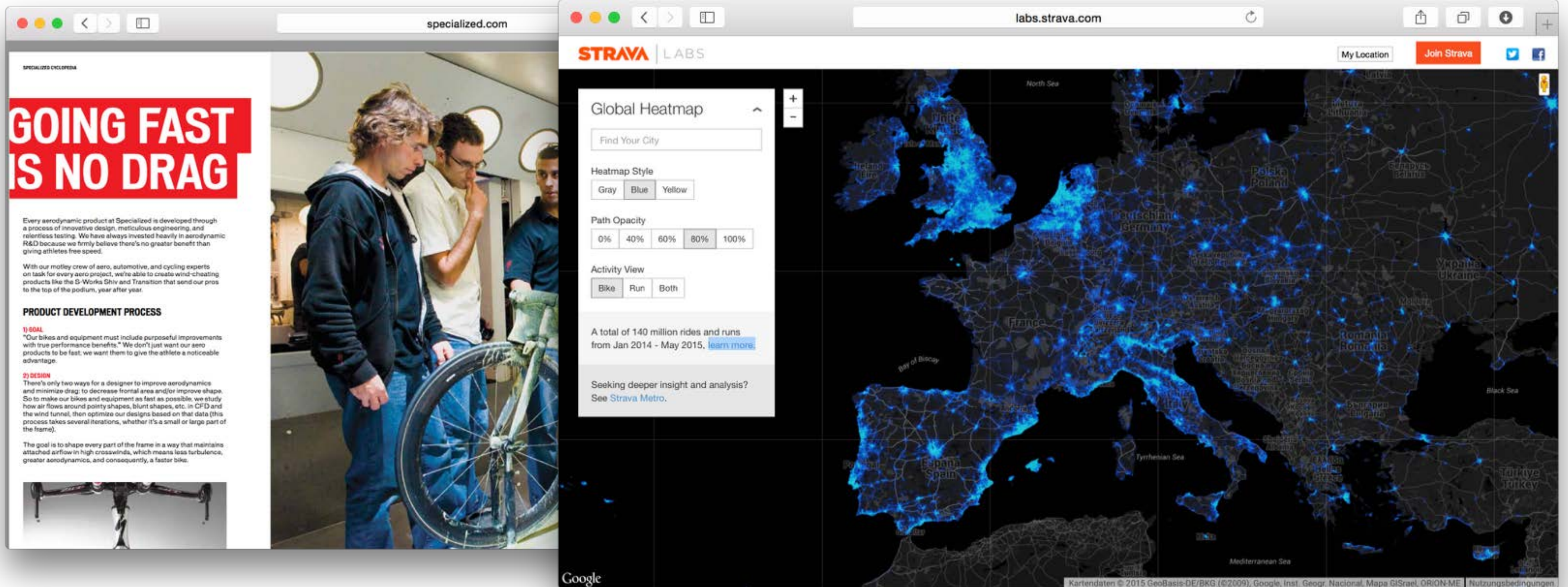
Ride historical routes that are the birthplace of legends and myths. And the ink for stories about endless sufferings, victories and losses.



Cycling industry plays destination and presents the most famous routes in the Alps. Apparel industry becomes a publishing house too. The industry enters new ventures to become a multi-channel communicator. The cycling industry starts activities that are similar to the tasks of DMO's.



Performance, performance, performance.
Measure the own performance and compete
against others is a central motivation for road bikers.
Especially people that work in an environment
where pressure to perform is business as usual,
are attracted by this sport.

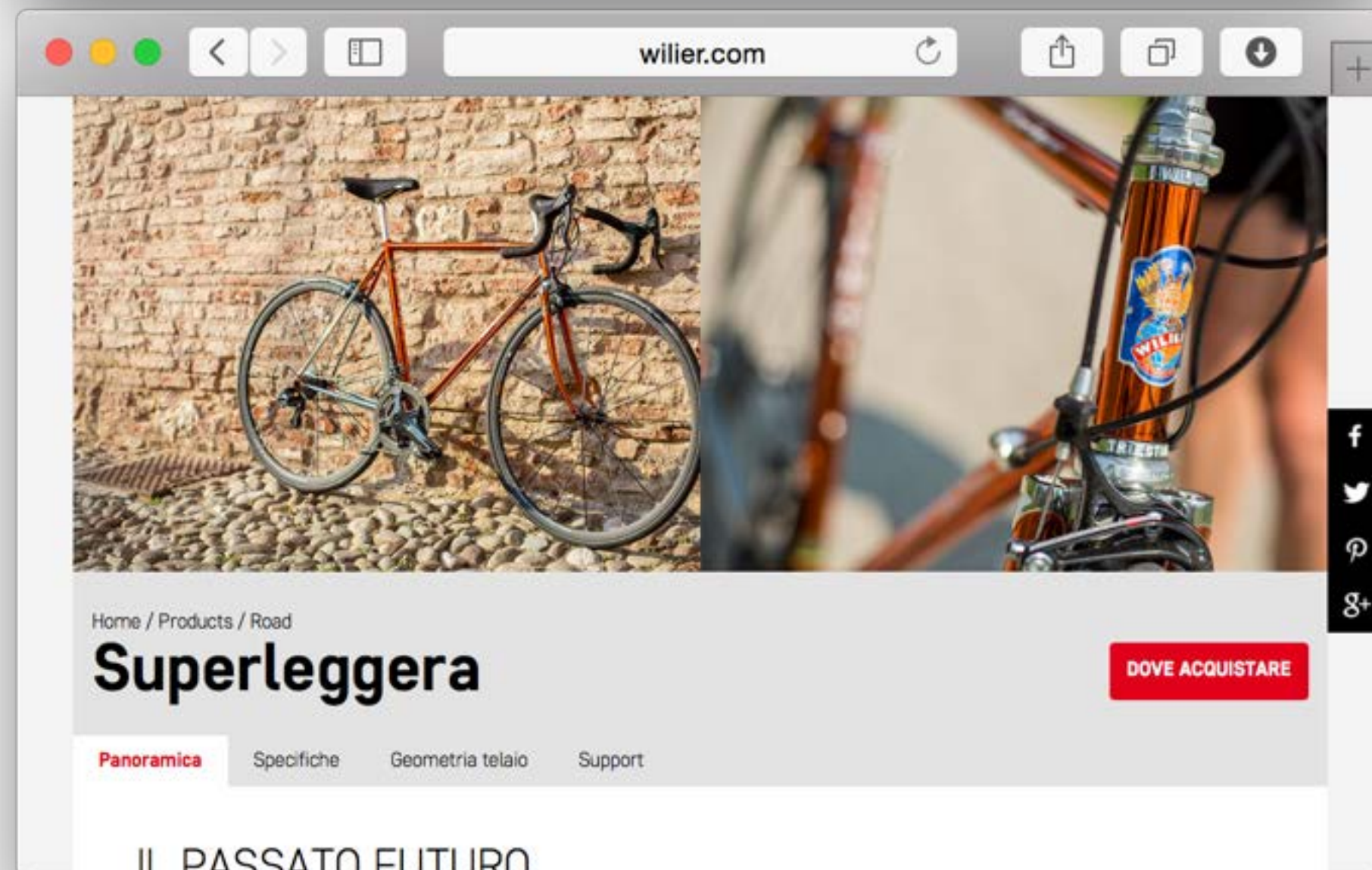
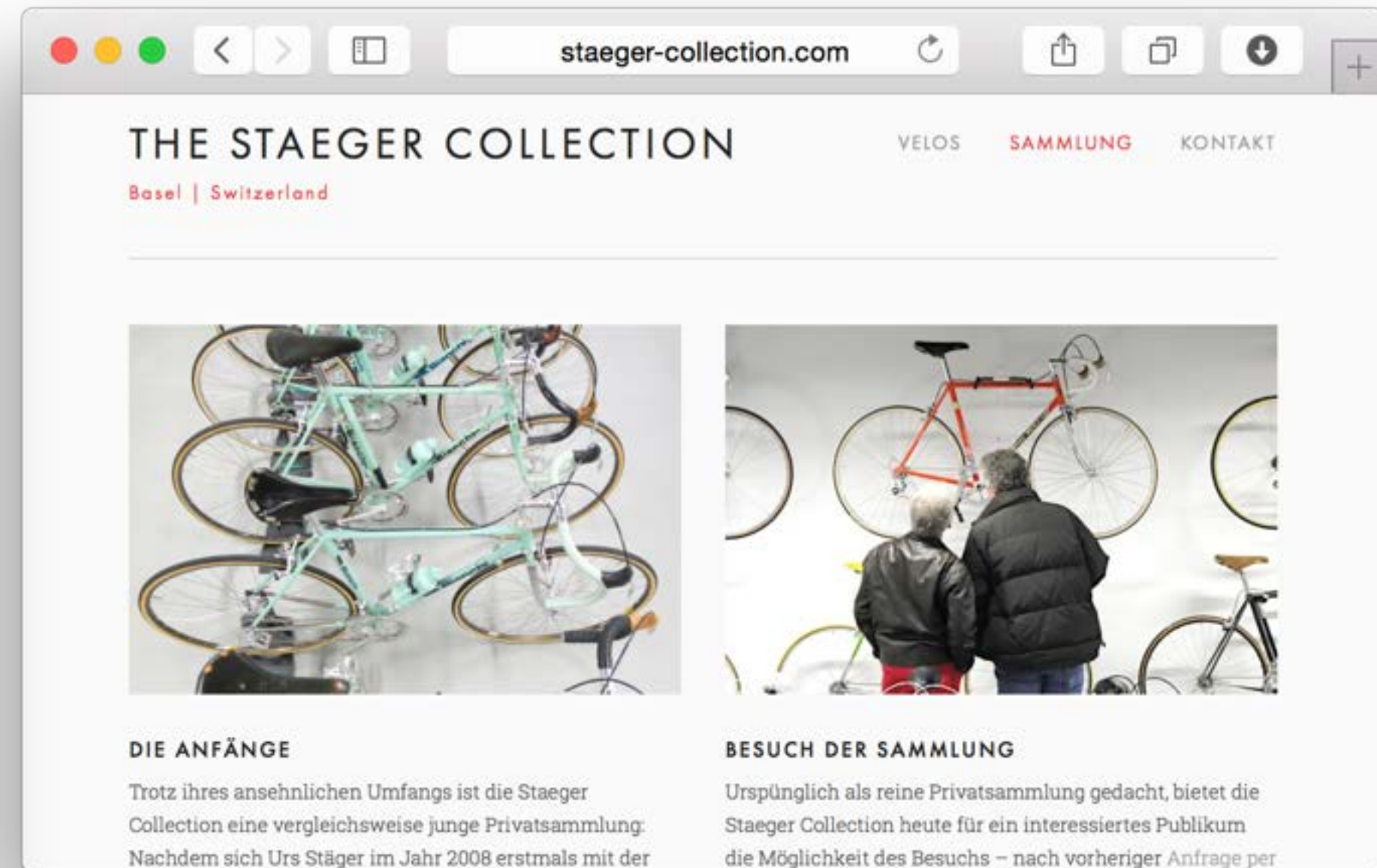
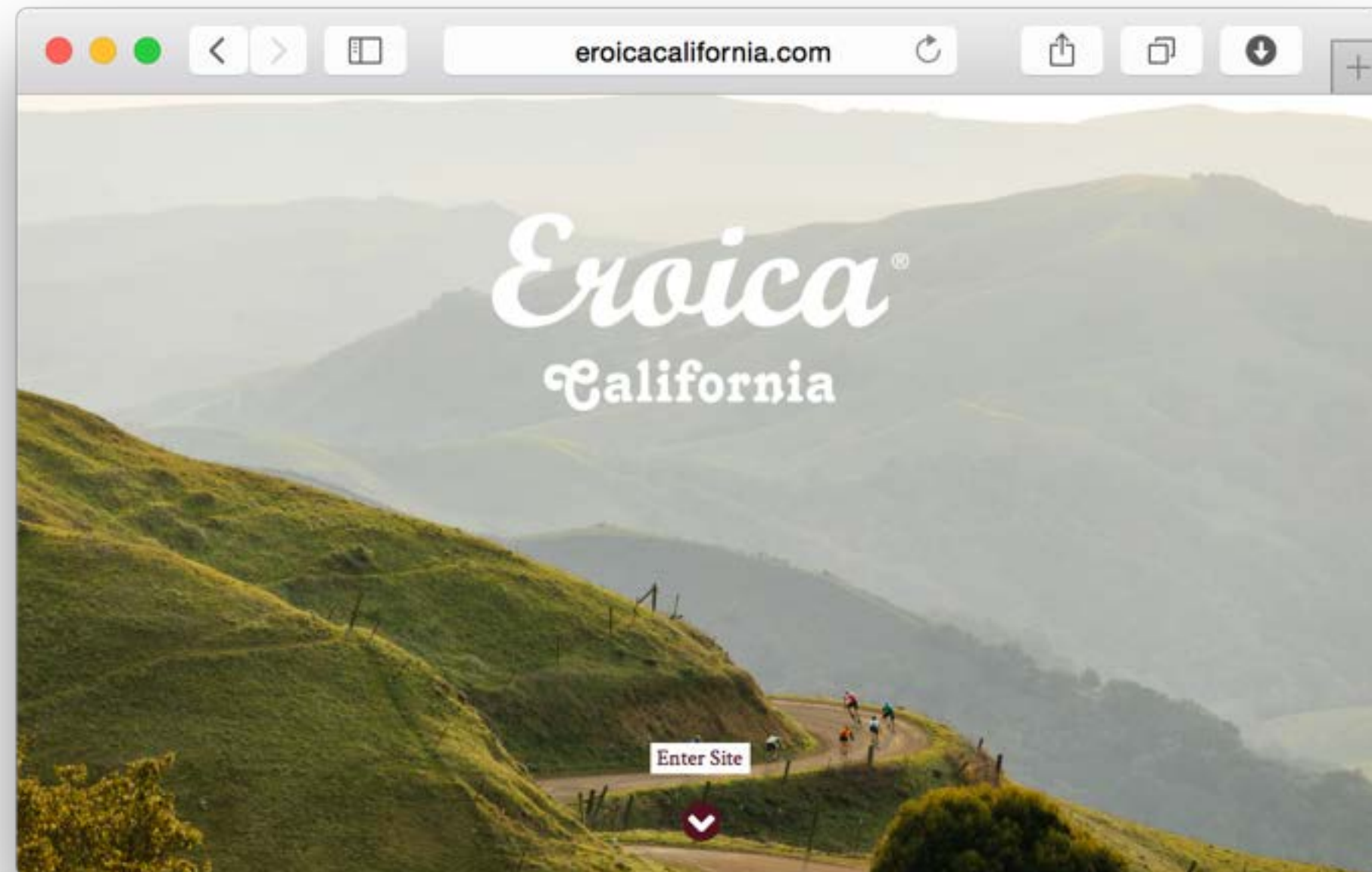


Innovation in light-weighted technologies and aerodynamics is still one of the central driving force in the industry. Total performance monitoring via devices and wearables, sophisticated web services and online communities are not only used by athletes. It is part of the standard equipment.

(Cases Specialized, Strava)



The vintage cult is strongly present in the road cycling culture. To own a bicycle with a heritage, participate at a vintage event is on the wish list list of an nearly every road biker.

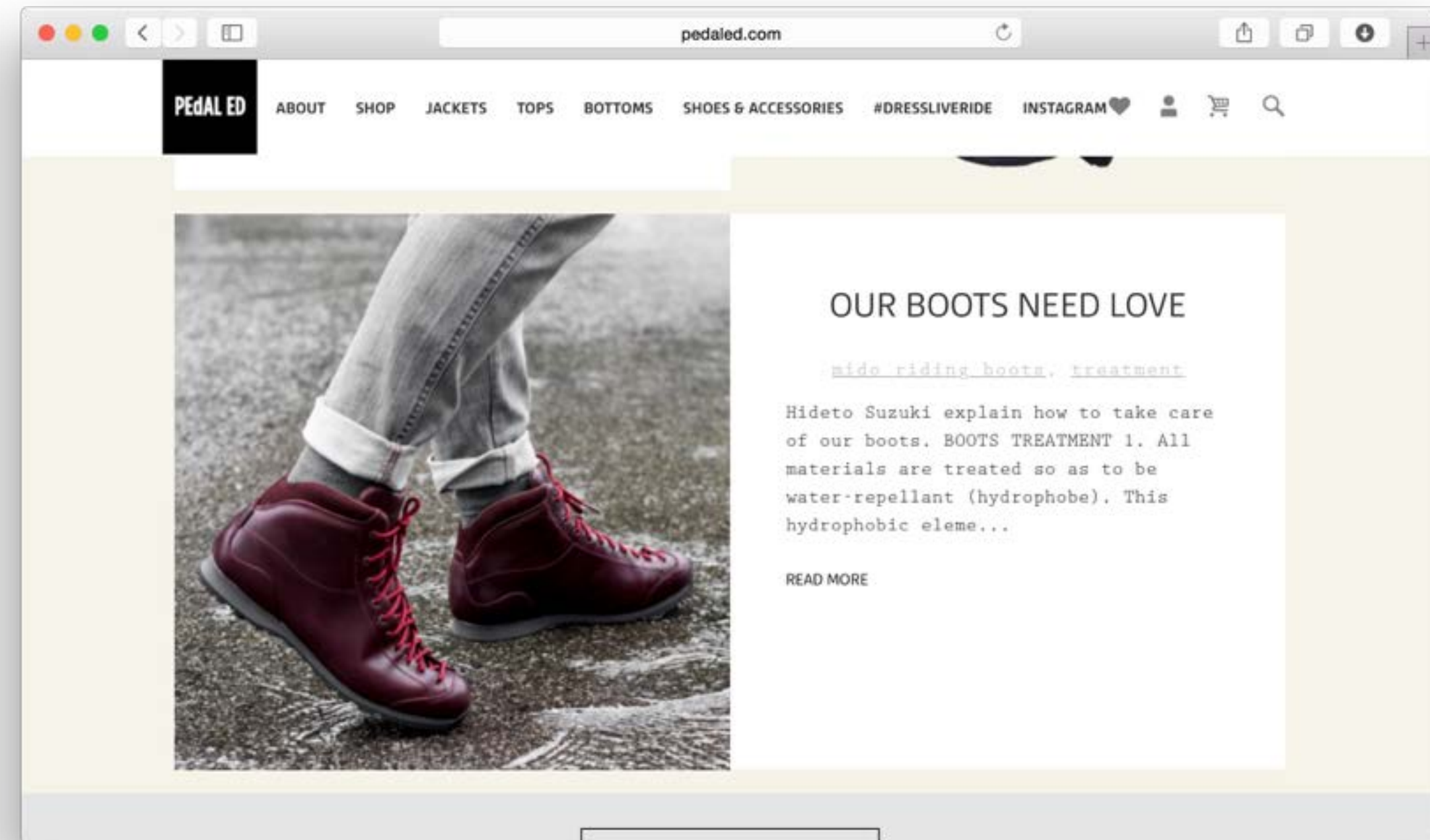
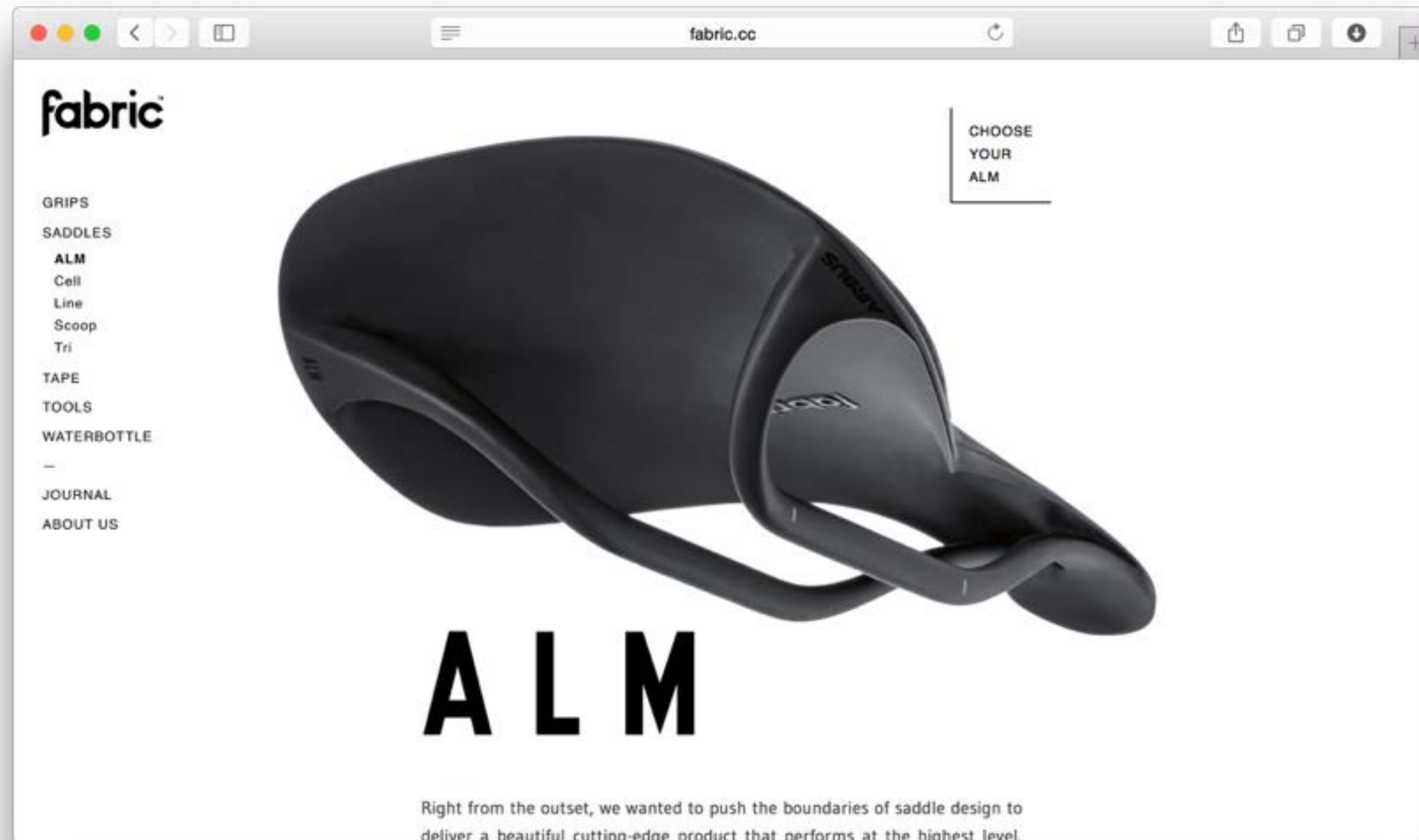


Almost every cycling producer with a corporate history over 30 years has presented a vintage/replica bike on Eurobike. Vintage top events like Eroica, originally from Tuscany/Siena is now exported in various other countries and are sold out in a few minutes. In Basel a private vintage museum has opened the doors.

(Cases Eroica, Staeger, and Wilier)



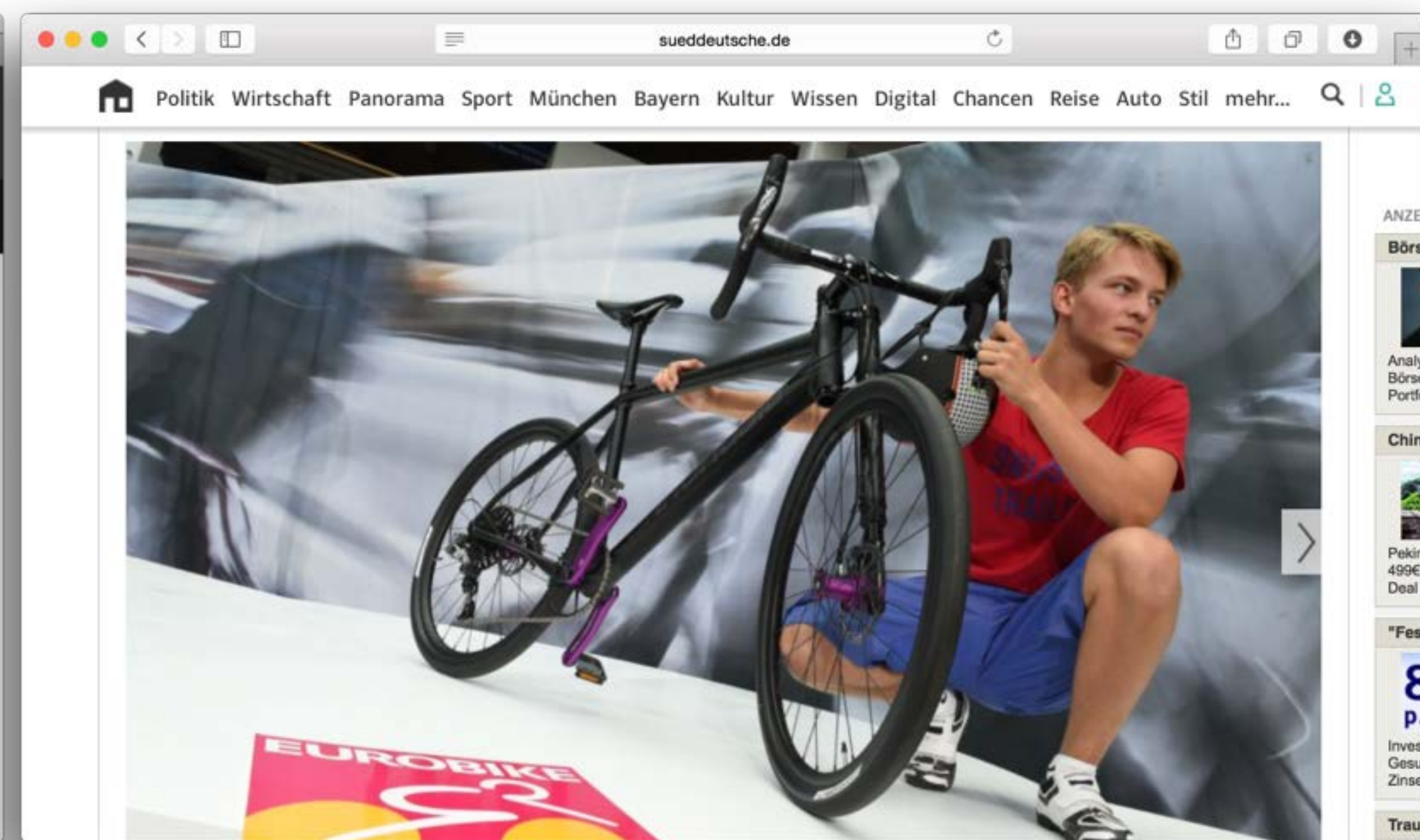
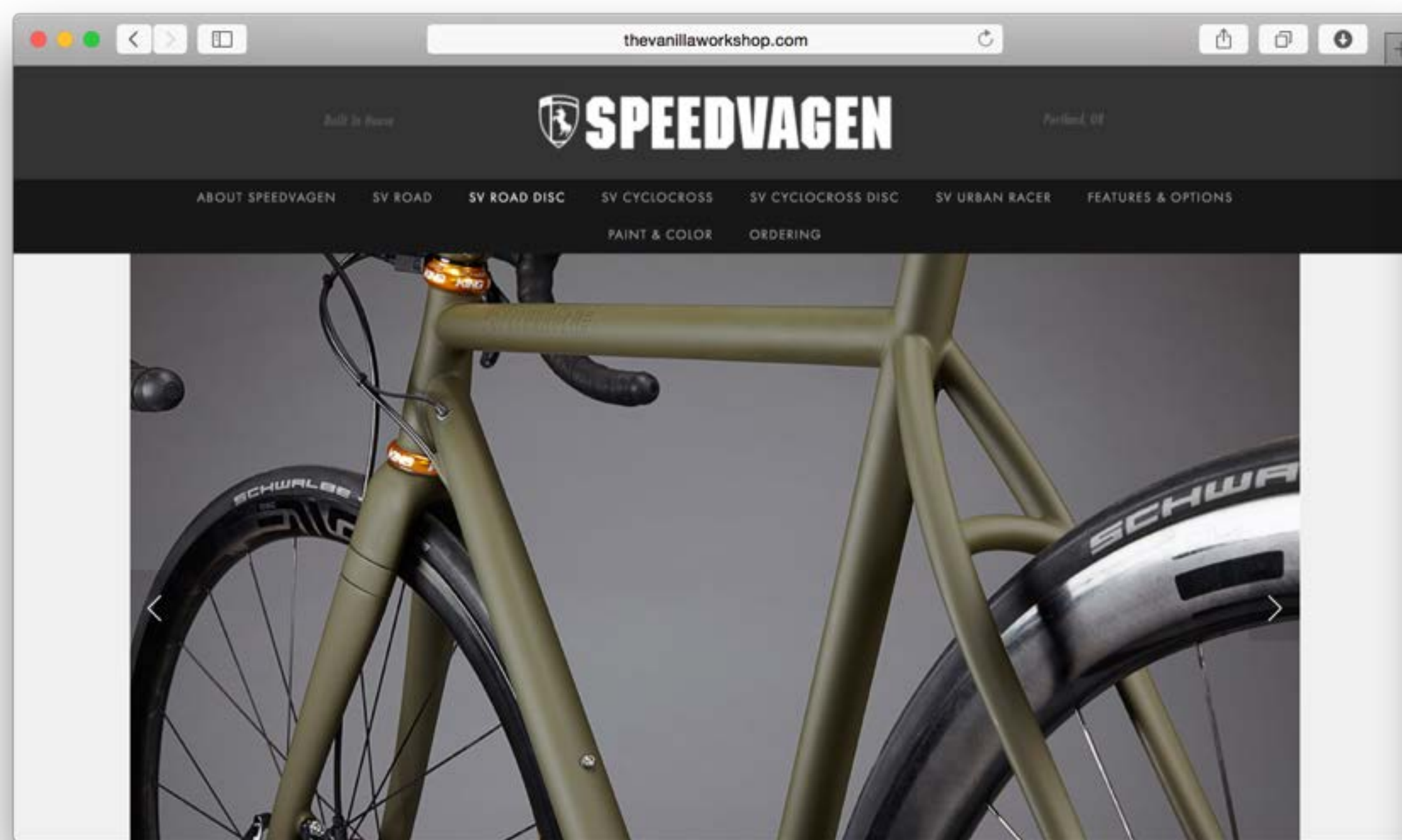
Be part of an exclusive community and show the own sportive and design oriented lifestyle by consuming the best performing brands. While spending a lot of money for the leisure activity.



The industry is very vivid and besides global big players a lot of small, specialized manufactures (officina) offer a wide range of individual products to allow personal self-differentiation strategies. Further, the design-code of road biking is transformed into every-days fashion and life-styles.



Beside riding the daily training tracks and planning a trip to the most famous Alpine pass roads, there is an emerging desire to ride while surrounded by pure nature.

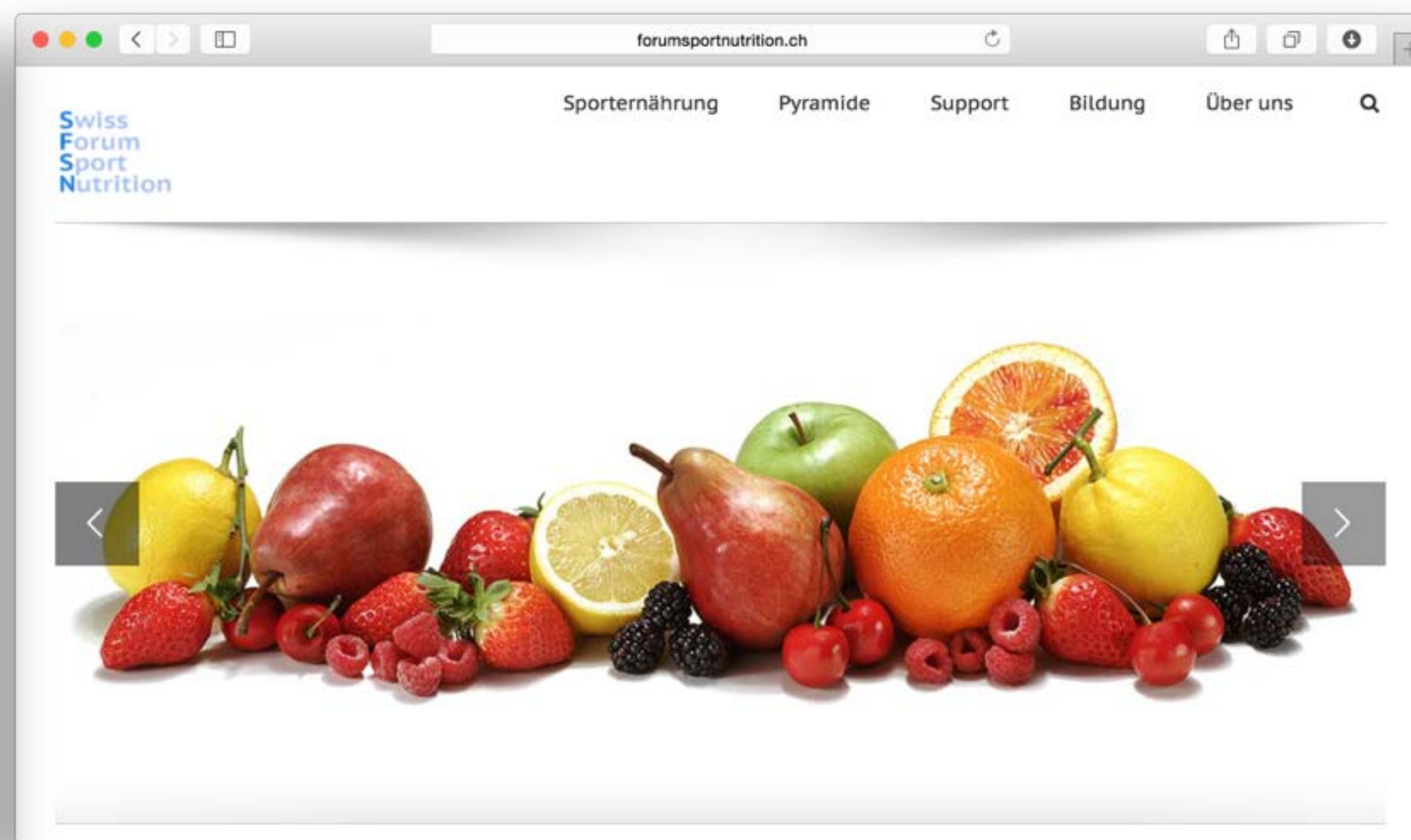
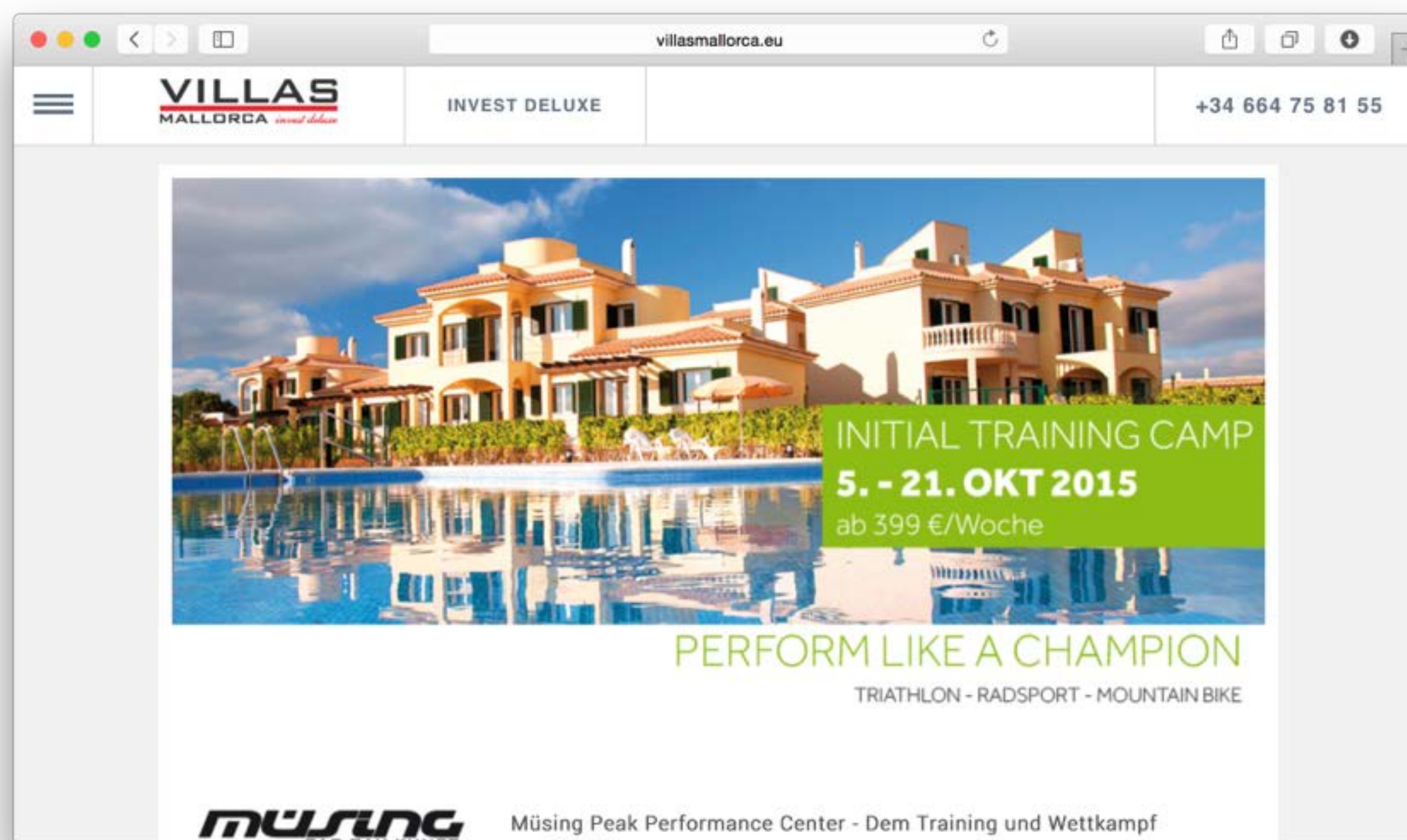


Cylcocross and gravel bikes are booming. In the next years we will see a lot of those bicycles not only on streets, but also on forest roads and trails. Further, since the UCI this year has allowed disc brakes* on road bike races, the range of use of a traditional road bike will be extended. It will be very easy to mount a 45 mm tyre with a profile that allows to ride offroad, on snow or mud.

*due to space limits caused by the brake levers the tyre-width was limited to 27 mm for road bikes.

(Cases Speedvagen and Cannondale)

Try to live a healthy
life-style.



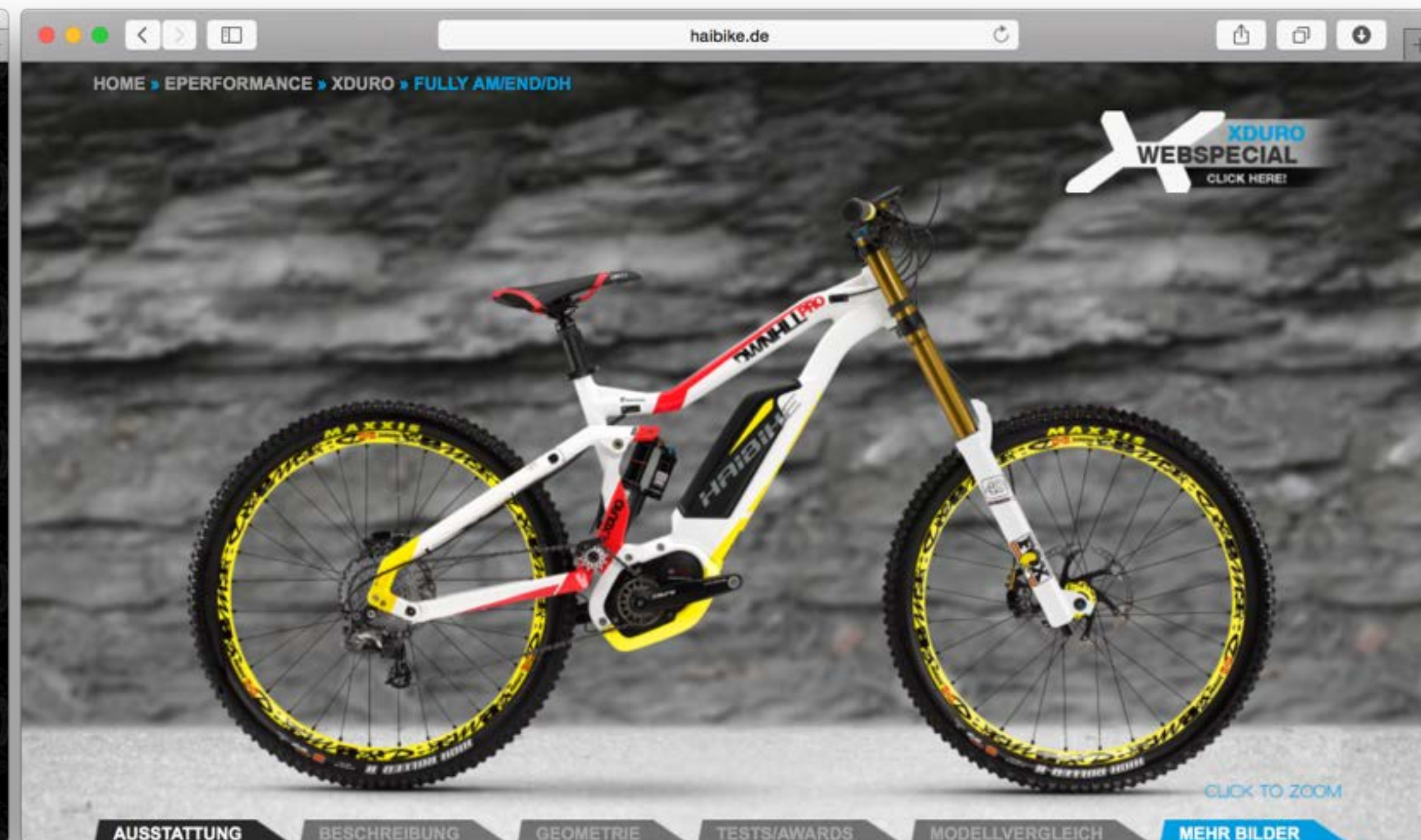
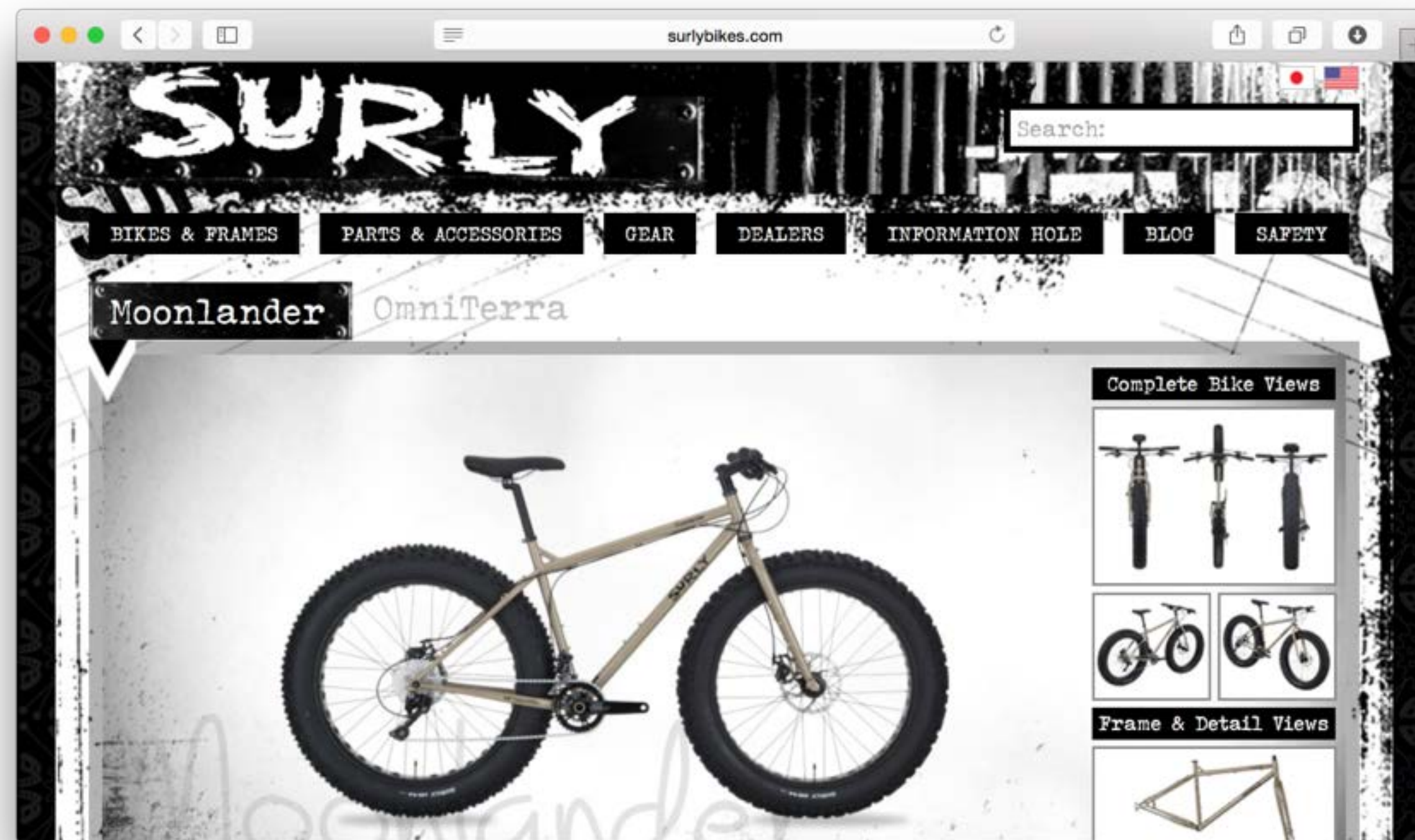
Holiday offers as a co-product of industry and destination/accommodation
whit a focus on nutrition and health-care are offered. Fresh and regional
product play an important role.



The mountain biker



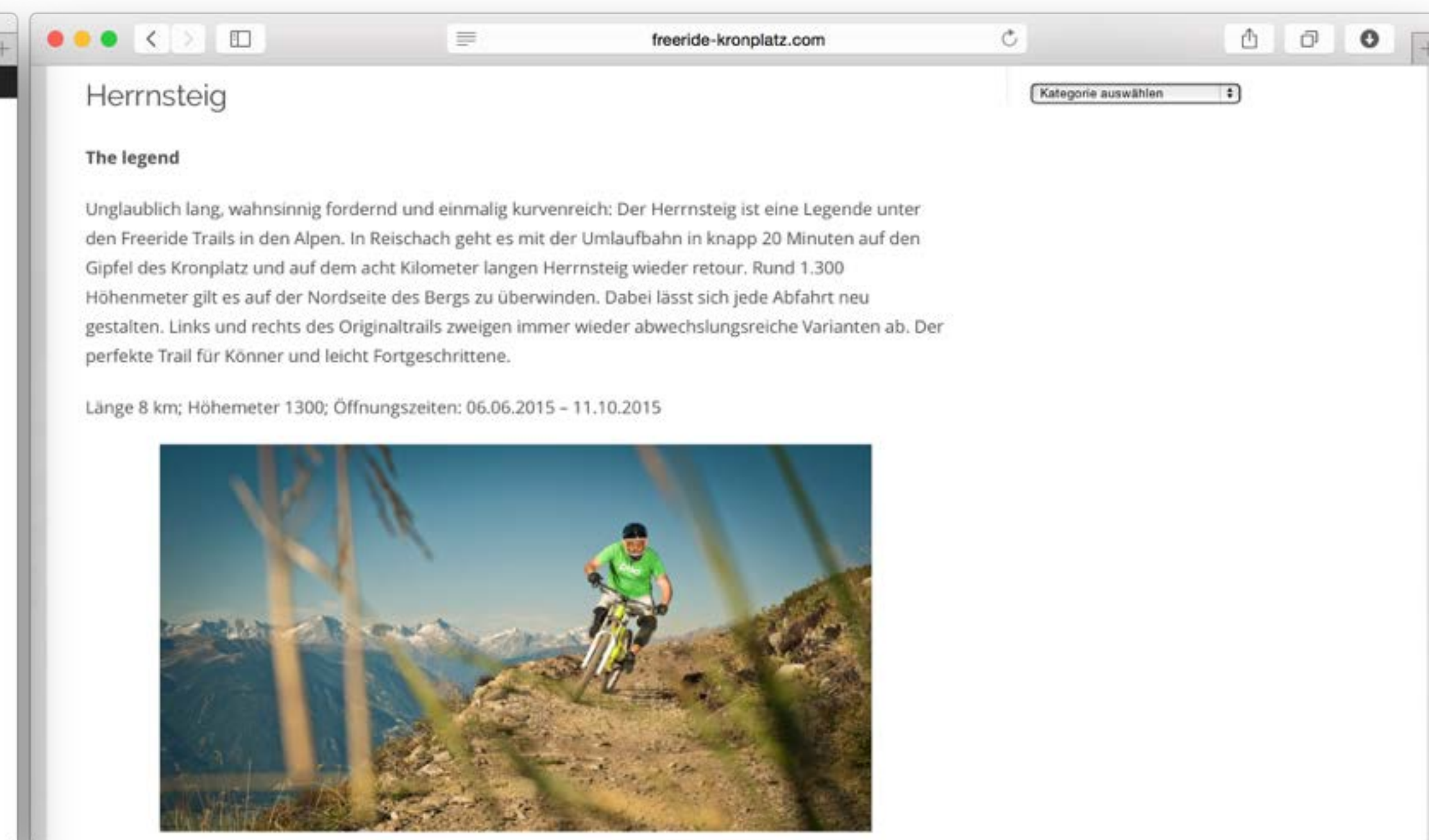
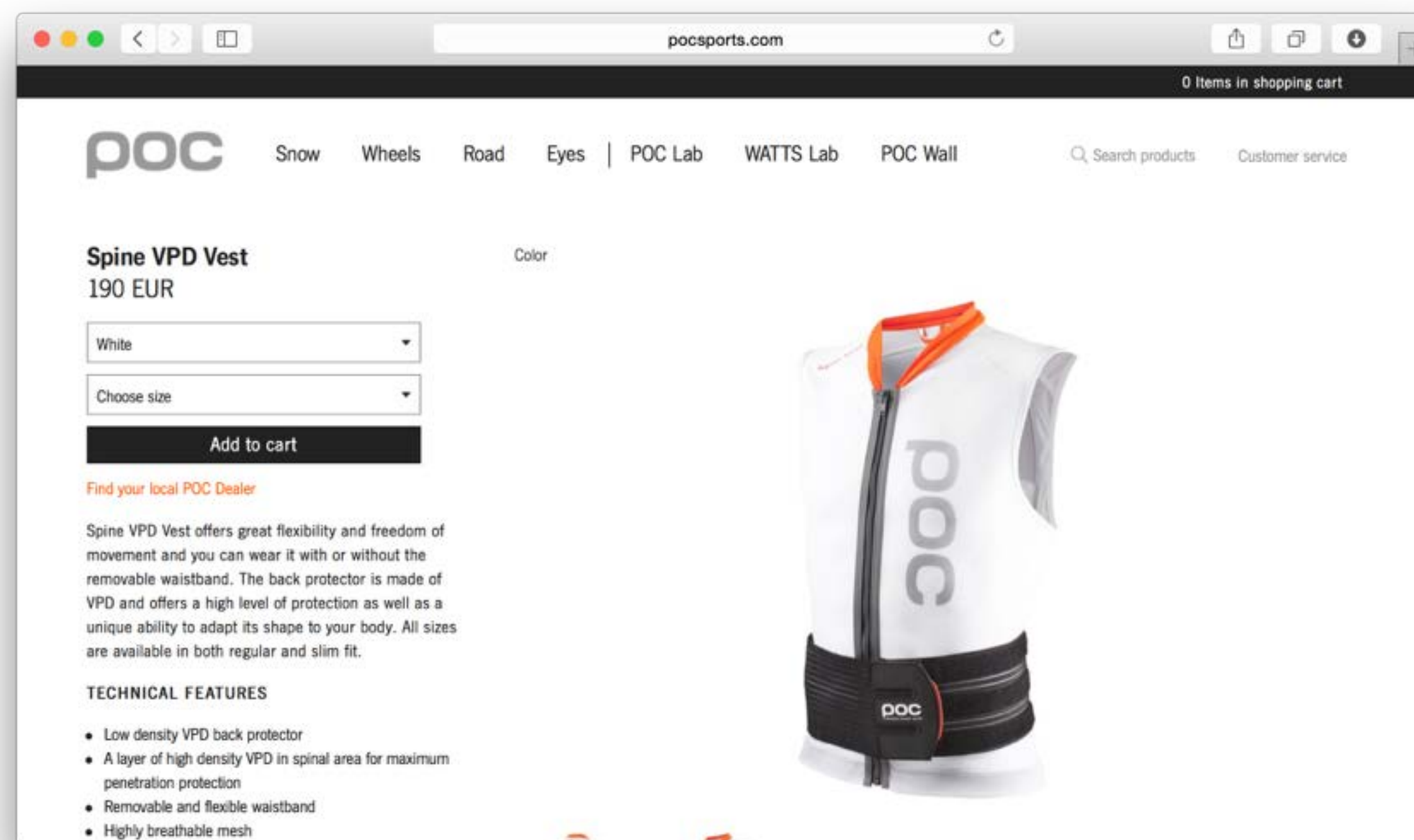
To catch the feeling of real adventure out there in the great nature and leaving the protected, urban environment. Be part of the great outdoors.



The variety of bikes has increased in the last years. There is not the ‚mountainbike‘ anymore, but different variations that offer different ‚styles‘ to ride out there: hardtail, all mountain, enduro, endure e-bikes, fat bikes, 29er, 650B, ...



To feel the fragility of living in a secure world.
The perception to be exposed to risk creates
an adrenalin-driven emotional context.

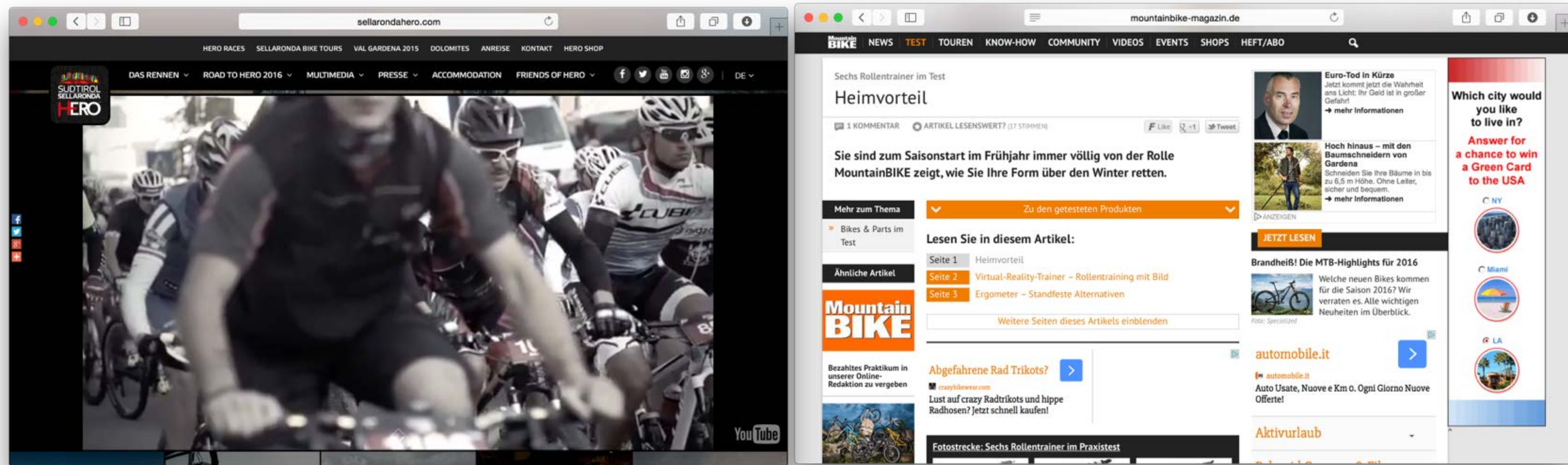


Mountain biking is an action/risk sport and to perform, technique and endurance need to be trained continuously. Due to the fact, that bikes have become better and better, a lot of protector-equipment is available and artificially produced trails allow a certain risk management, also the *normal* biker can feel the emotion of doing something ‚dangerous‘. As a consequence, mountain biking overall has become more downhill-oriented.



Performance, whereby this performance manifests themselves in two different ways: the uphill and the downhill performance. Two sides of the same coin, but nevertheless very different.

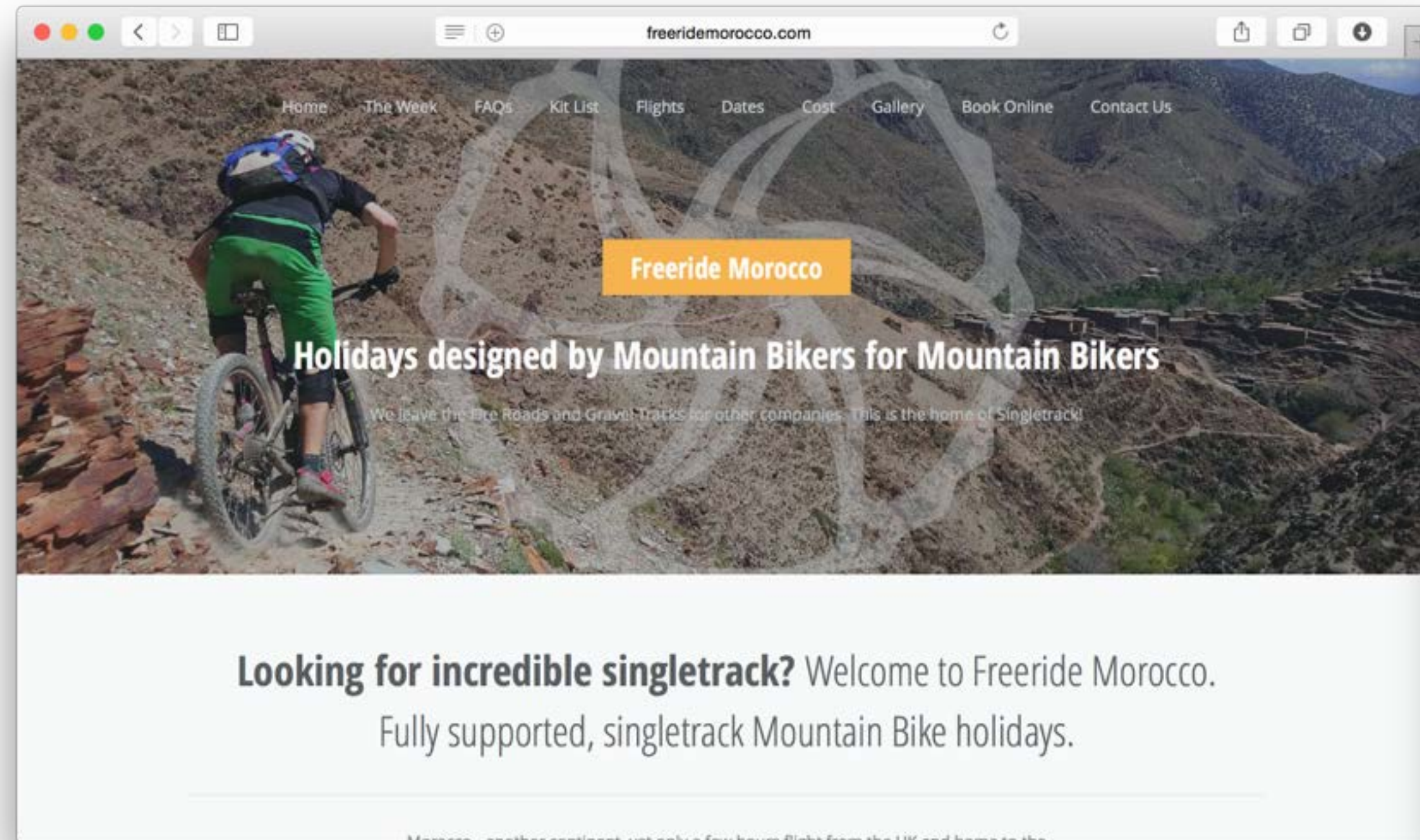




Training camps, special nutrition (and even test of müsli-riegel), race-events to measure oneself with others, monitoring-devices, light-weight parts, ...
For every problem the offer-side has a solution.



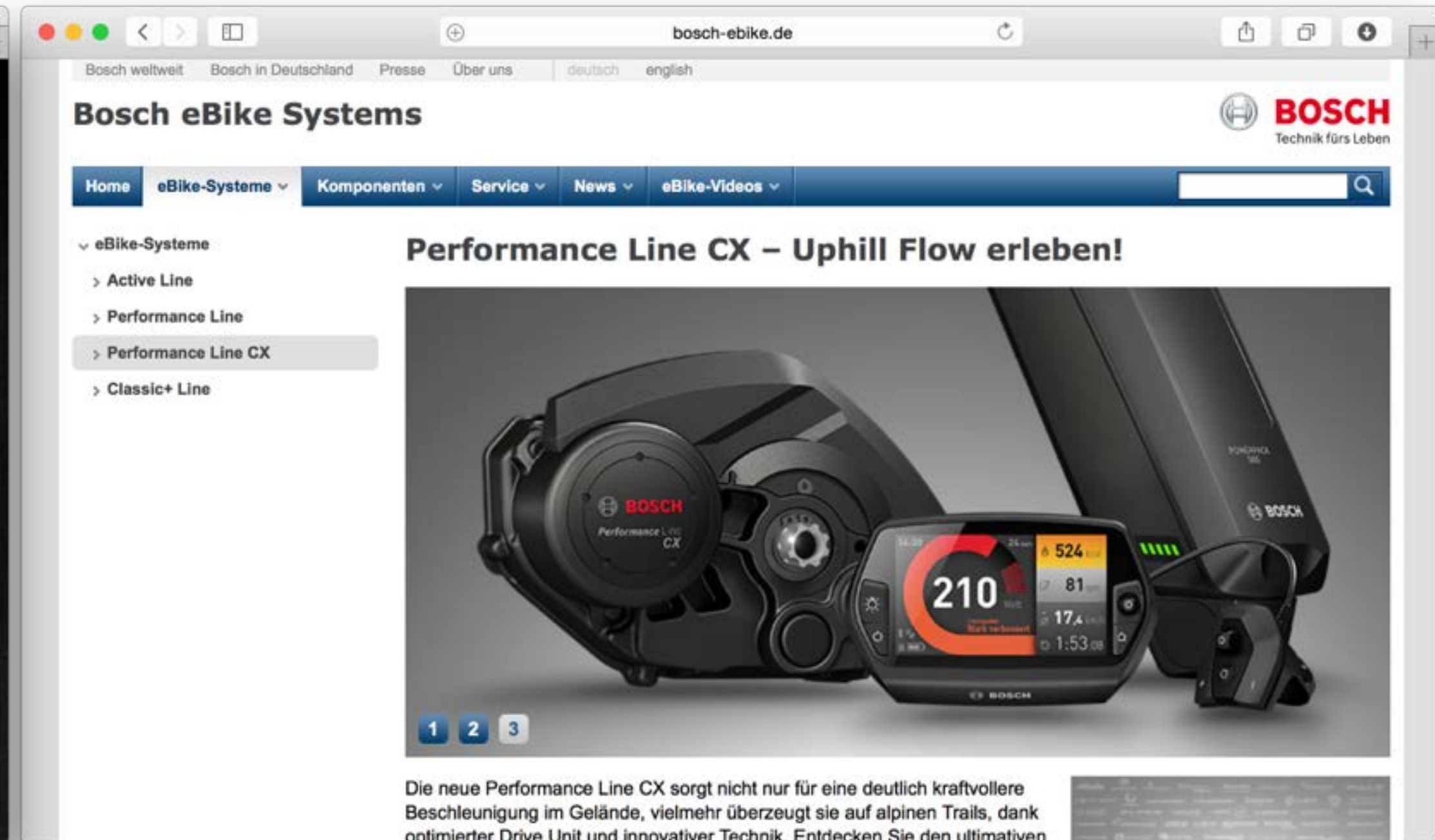
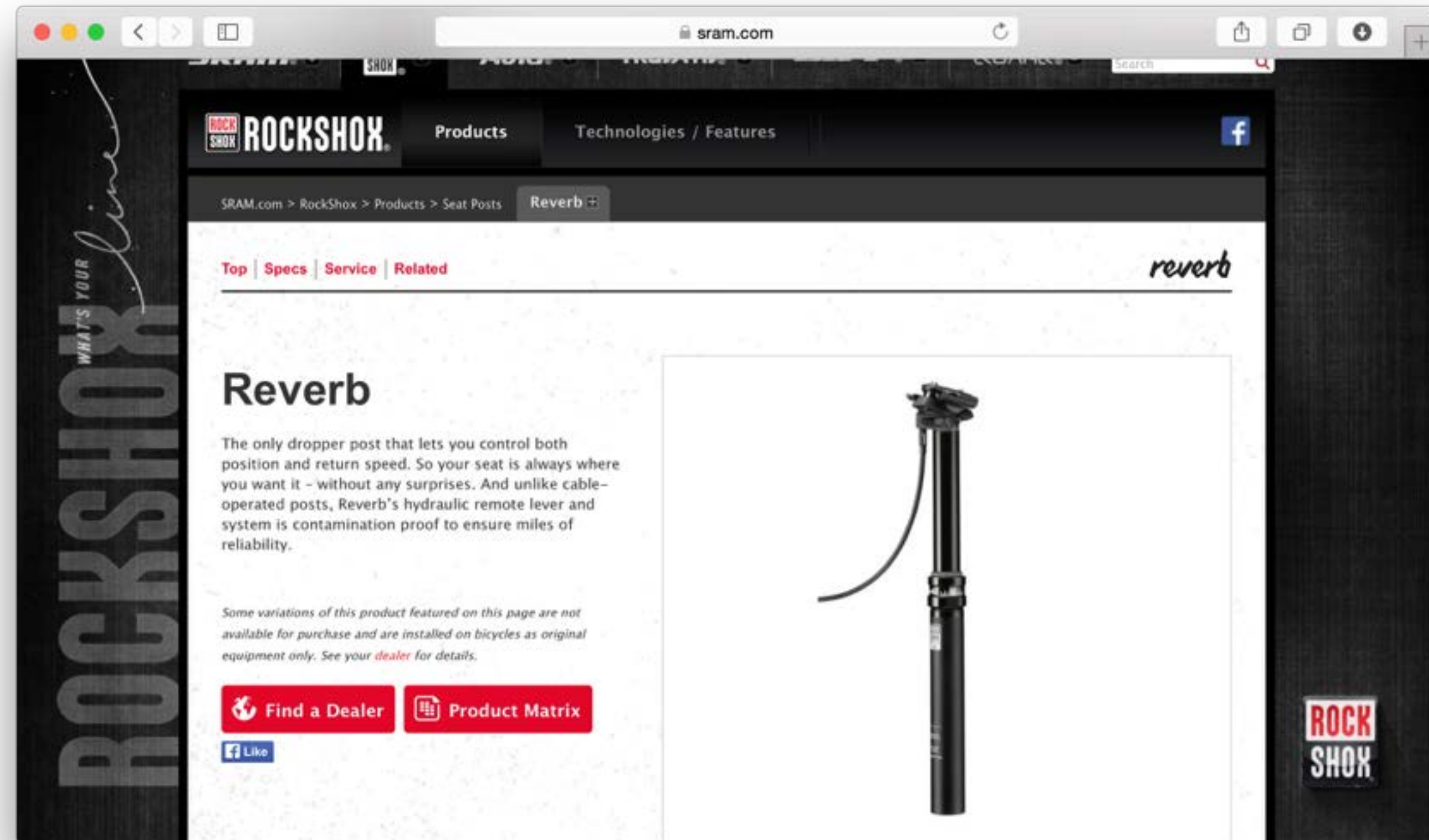
The variety of experiences that mountain biking can offer: mountains, landscapes, action, gastronomy, events, culture – the travel experience was and is always part of the mountain bike culture.



There are plenty of custom offers, that combine all those aspects. Bike Festival Riva, Testival Brixen, one-stop-shop solution to go to Utah, do a a Transalp or to visit the Atlas in Morocco. The travel experience is a central element of mountain biking an several hot spots around the globe have become a *mekka for mountain biking*.



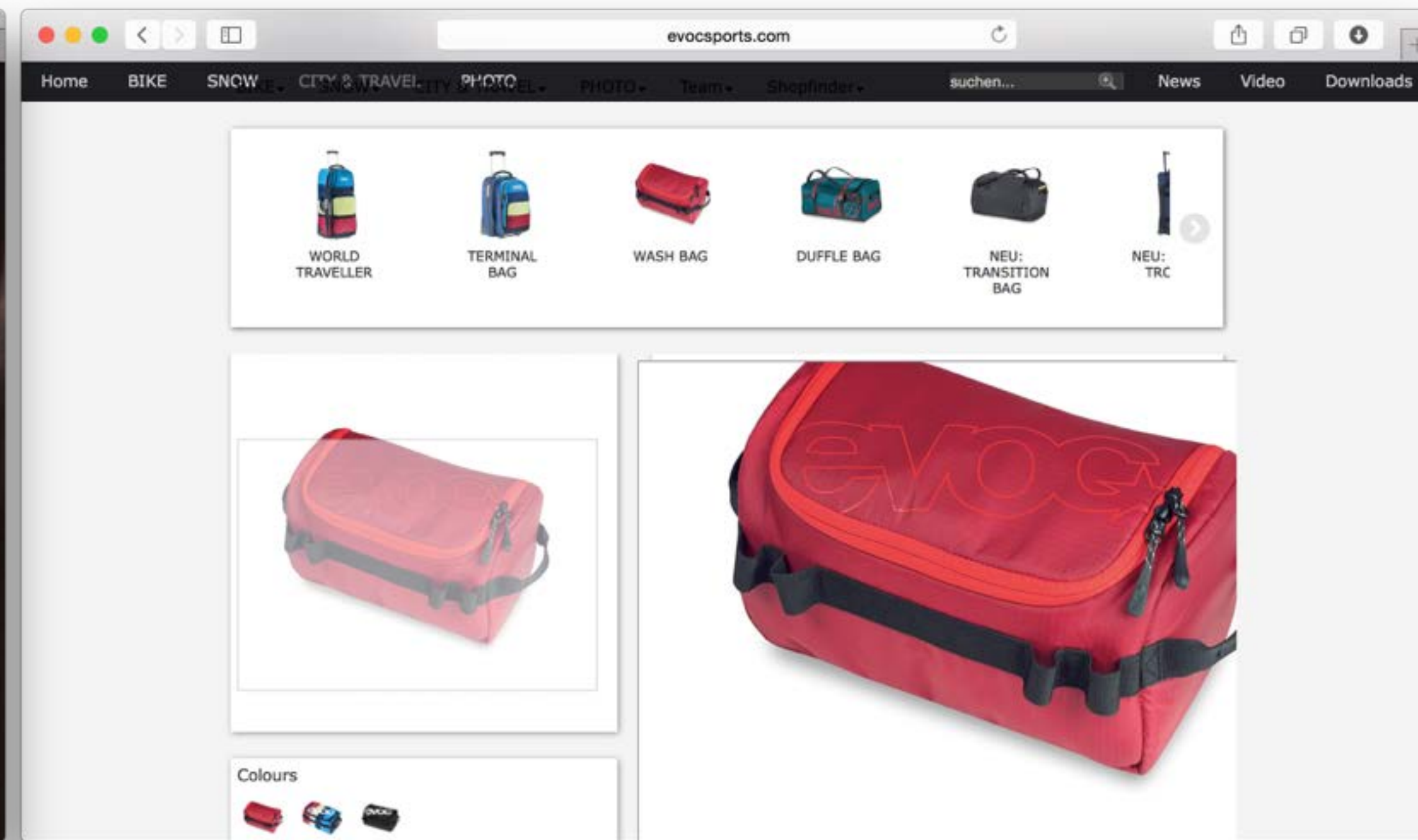
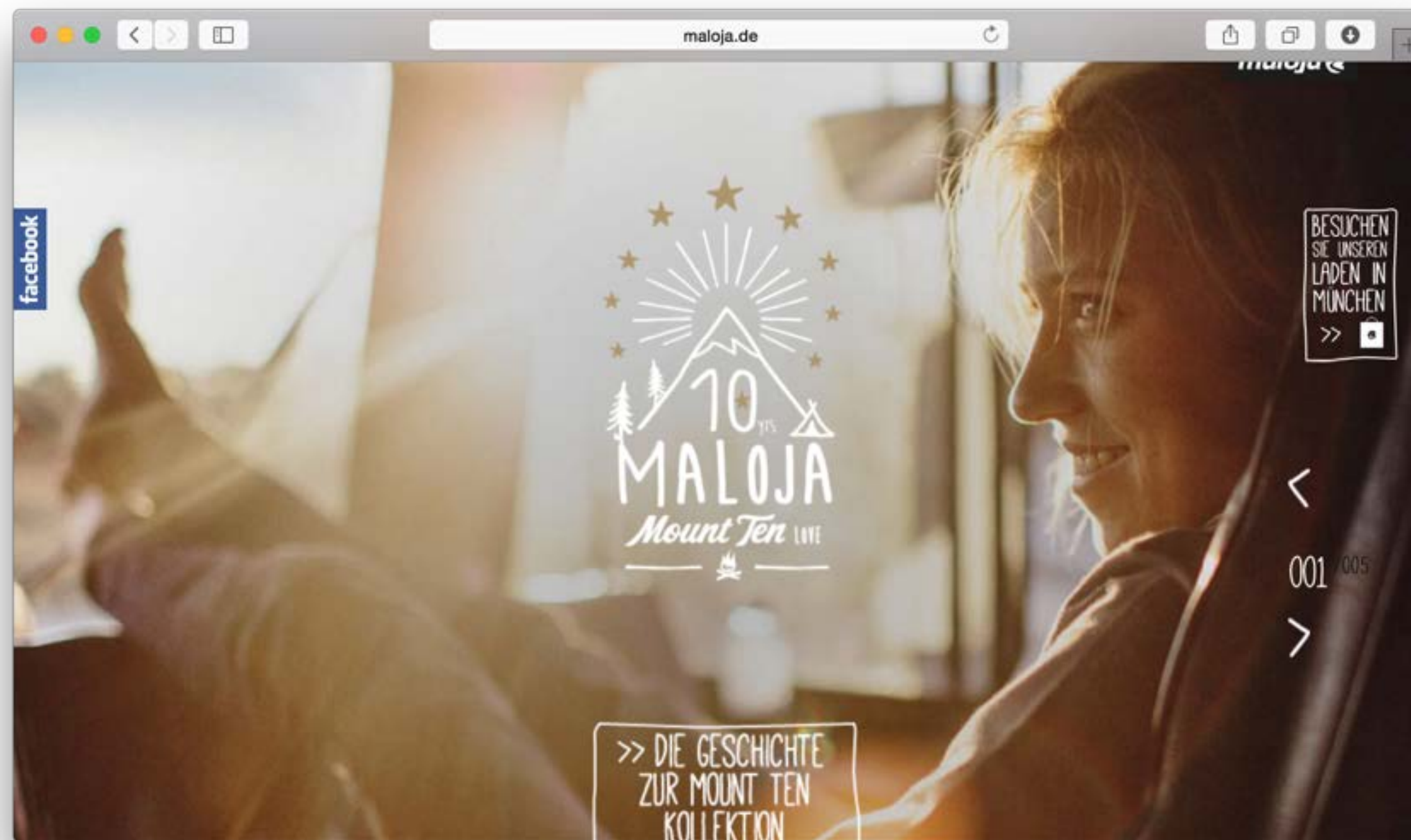
Especially for men, the high-tech and ongoing innovation in mountain bike industry creates fascinations.



Beside being a relatively young sport, mountain biking is characterized by ongoing innovation. Producer a pushing new technologies and products into to market, followed by multi channel marketing strategies that create a continuous demand for consumption.



Mountain biking is more than having a bicycle with fat tyres. Is a way of life where friendship, 'lagerfeuer', camper van and the sound of a guitar are the ingredients of a desire. Mountain biking is the desire to escape the day-by-day business.



Several companies have enlarged their product range to create a life-style that goes far beyond the pure ,cycling activity'. The object is to create a life-style that works as a symbolic code to show to the others:
Yes, here I am and I am a mountain biker!



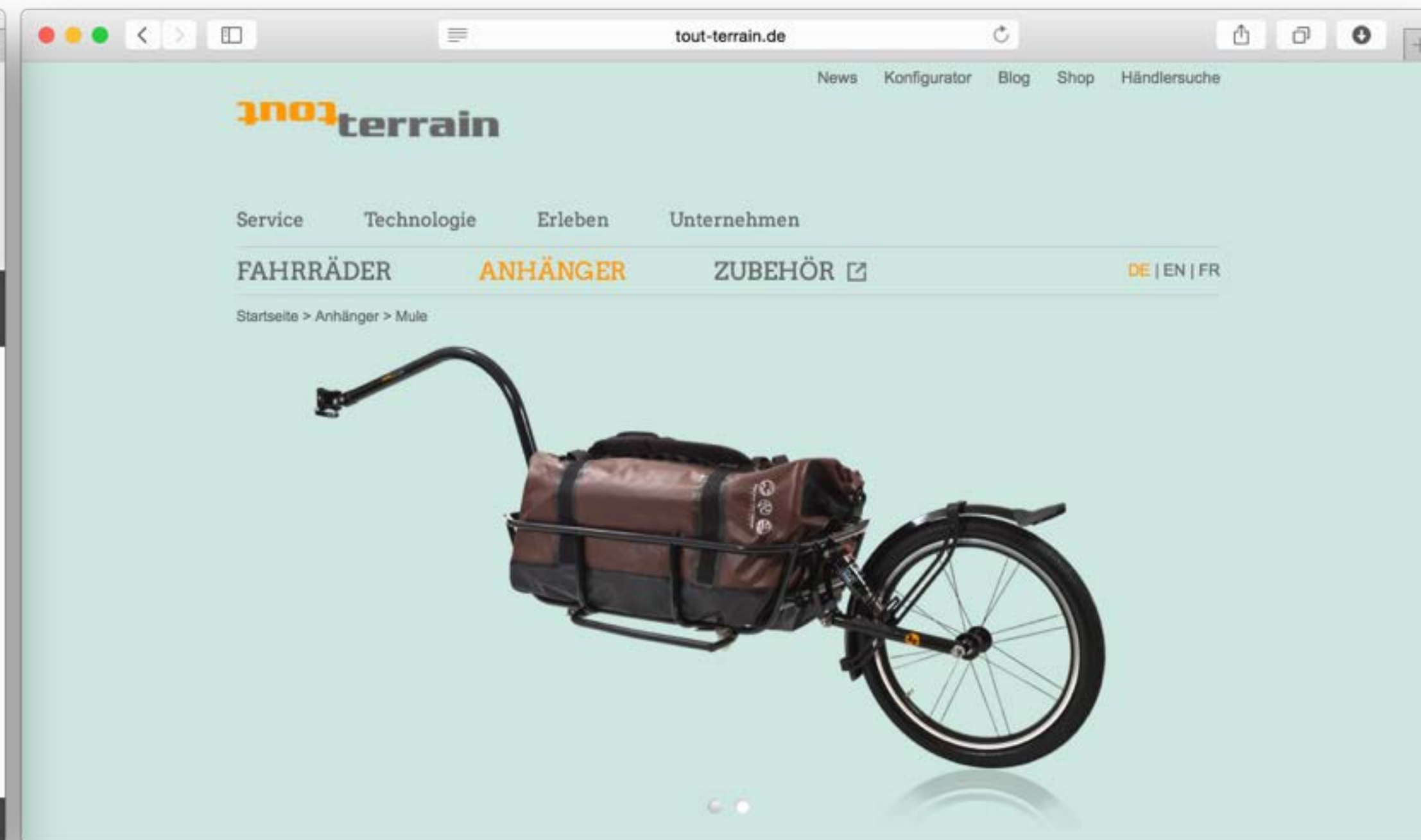
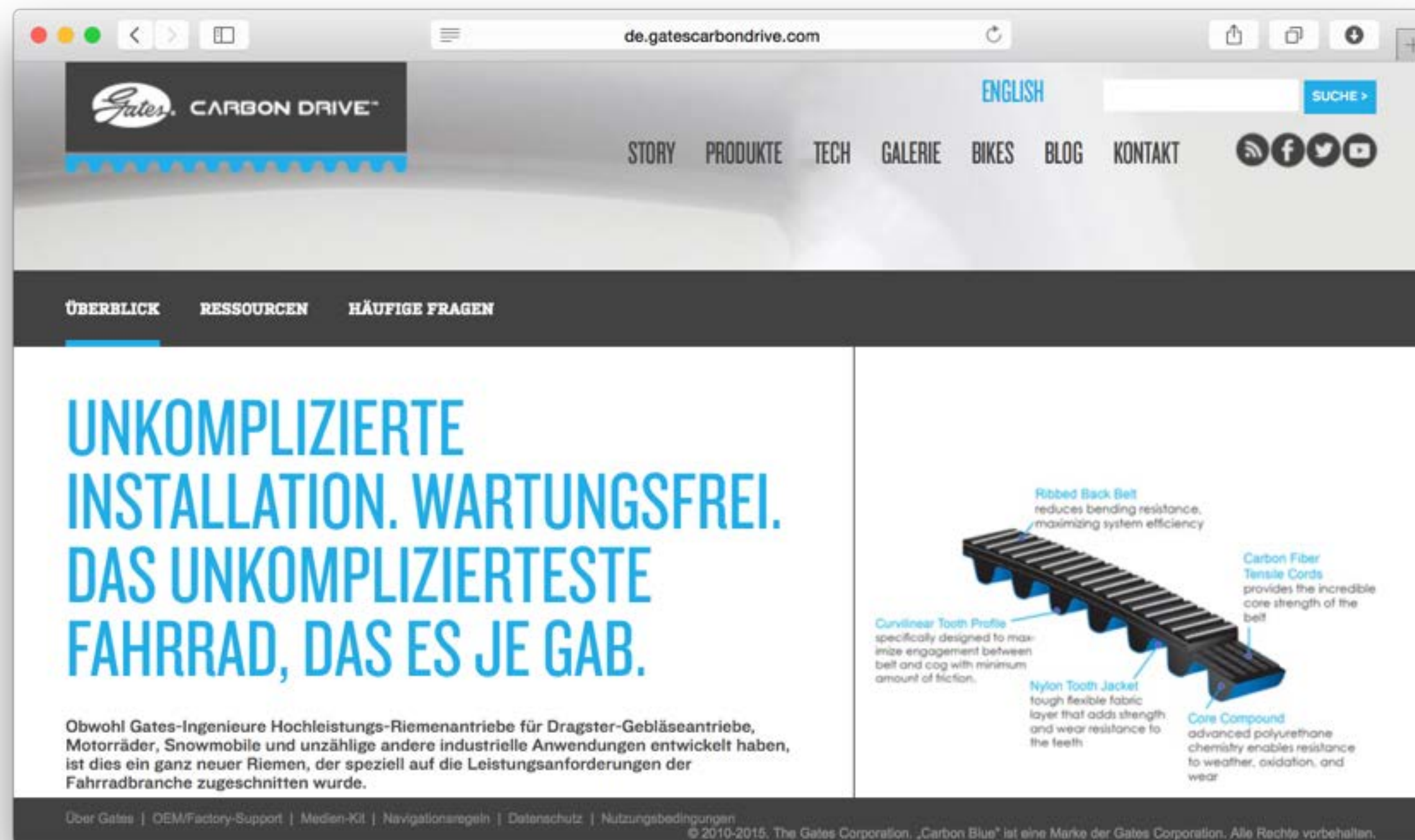
Try to live a healthy
life-style.



The trekking biker



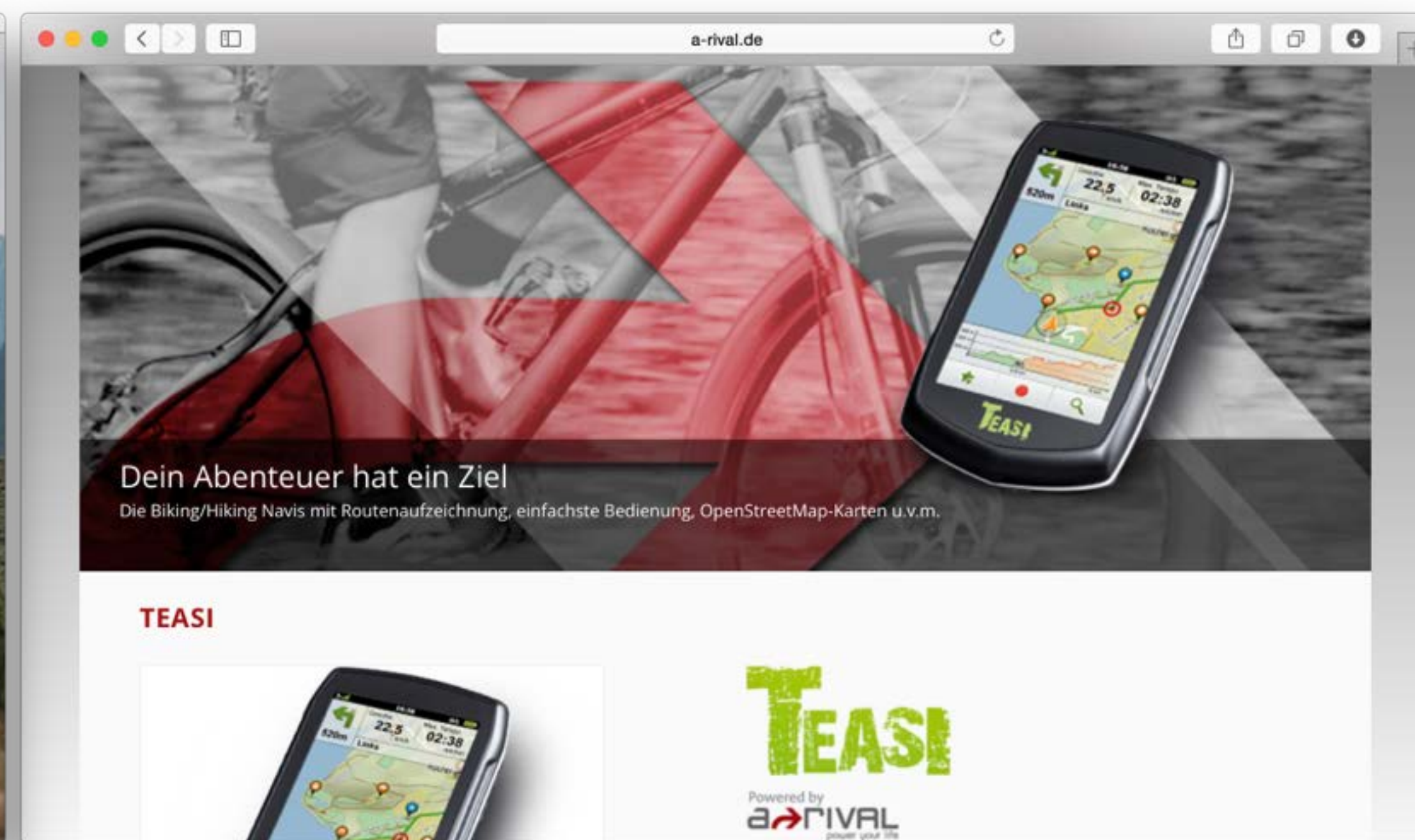
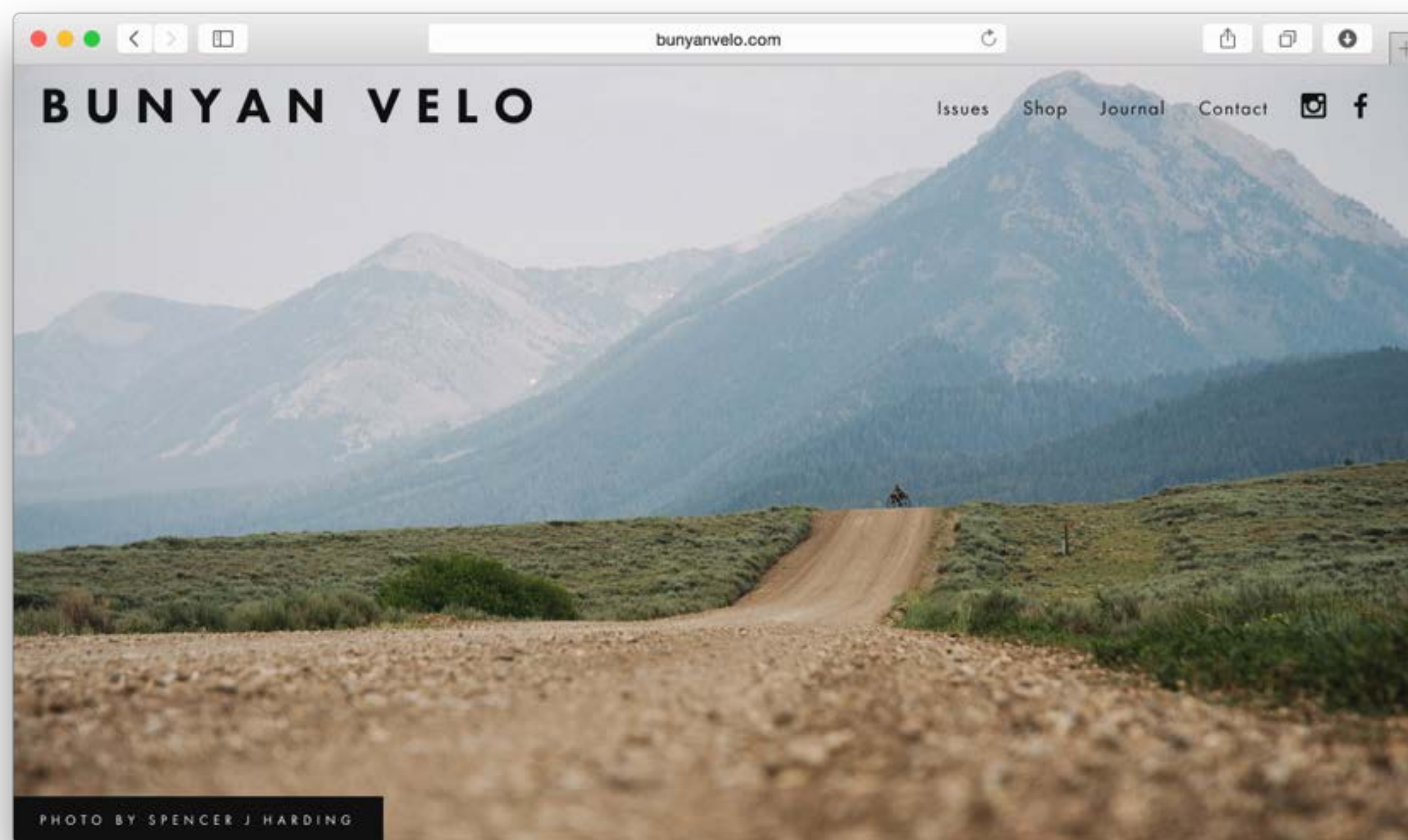
Doing some physical activities during holidays and weekends to maintain a good level of fitness and health. But it is far away from athletic performance.



From time of the legendary ‚Kettler Alu-Rad‘ nowadays the industry offers a wide range of tailored products to respond to the increasing demand on comfortable bicycles and equipment to meet the needs of travelers: low maintenance drives, pack-packs, led-lights, battery reach, ...



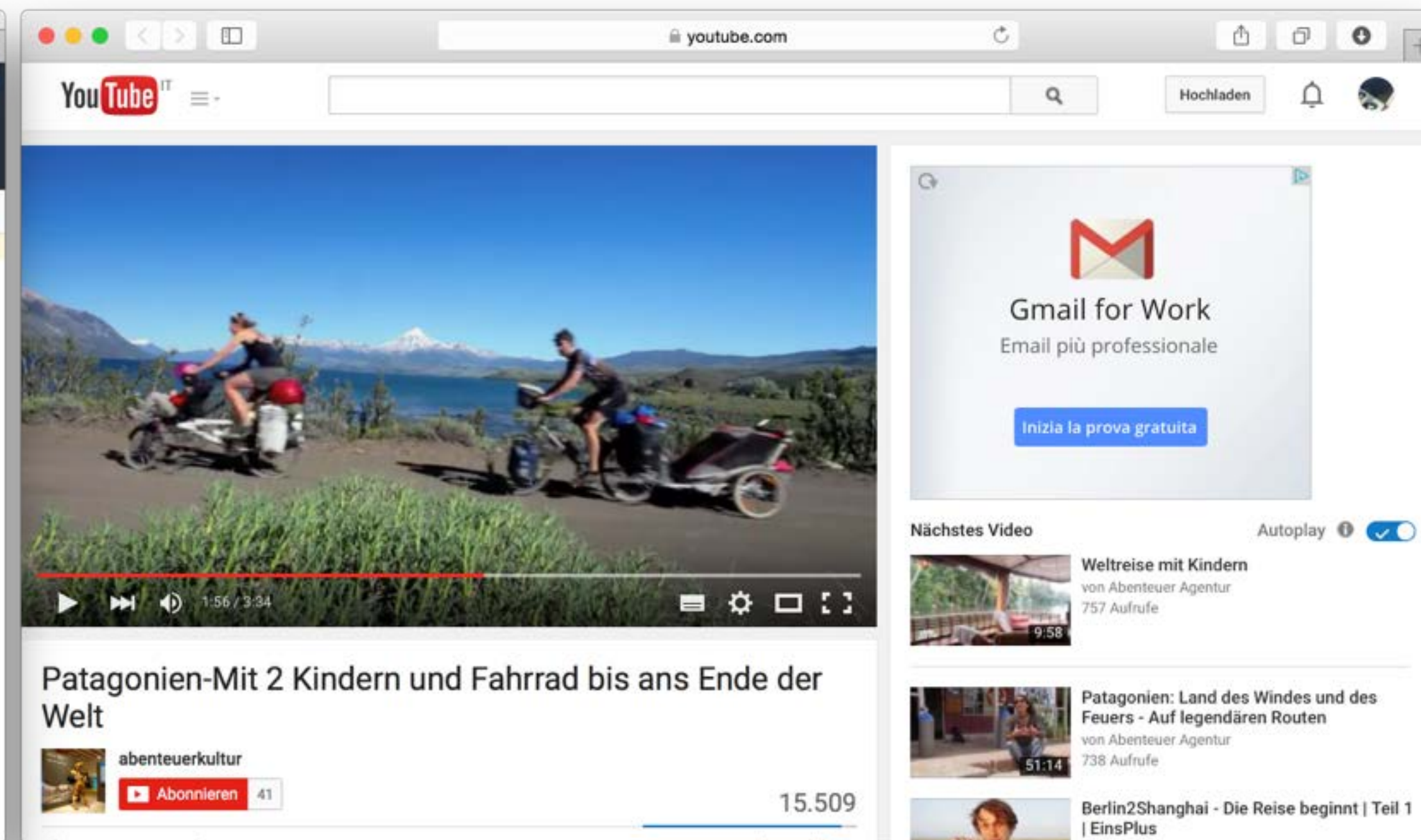
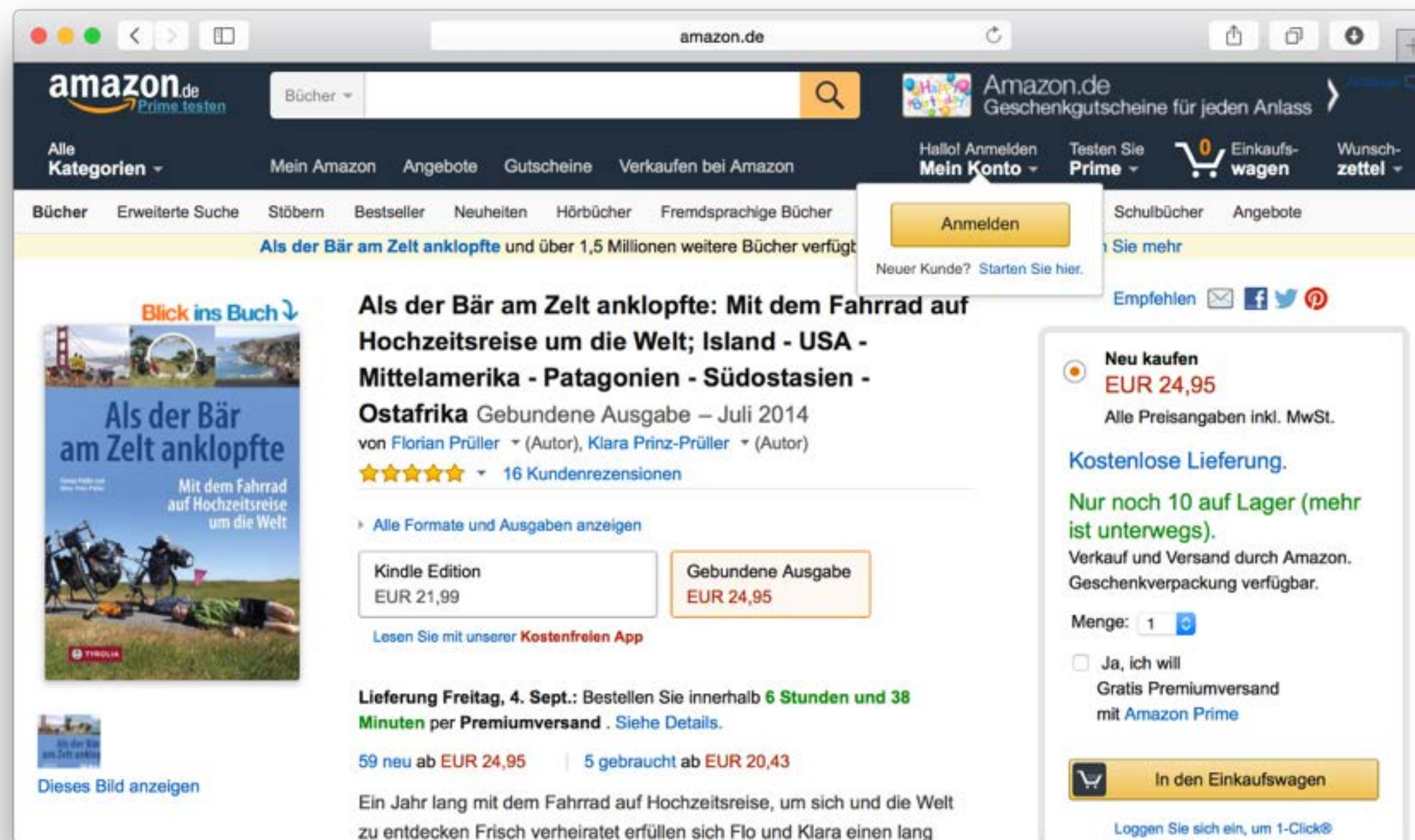
The ,learning experience‘, ,slow down‘ and the sensation of ,personal freedom‘ on holidays are important. The bicycle, a slow motion vehicle, is a good way to explore a new region and get into a new emotional context.



Further development of infrastructure, dedicated literature, maps and online services, bicycle navigation devices, etc. lower the entry-barriers and make it also possible to visit foreign countries as an individual tourist.



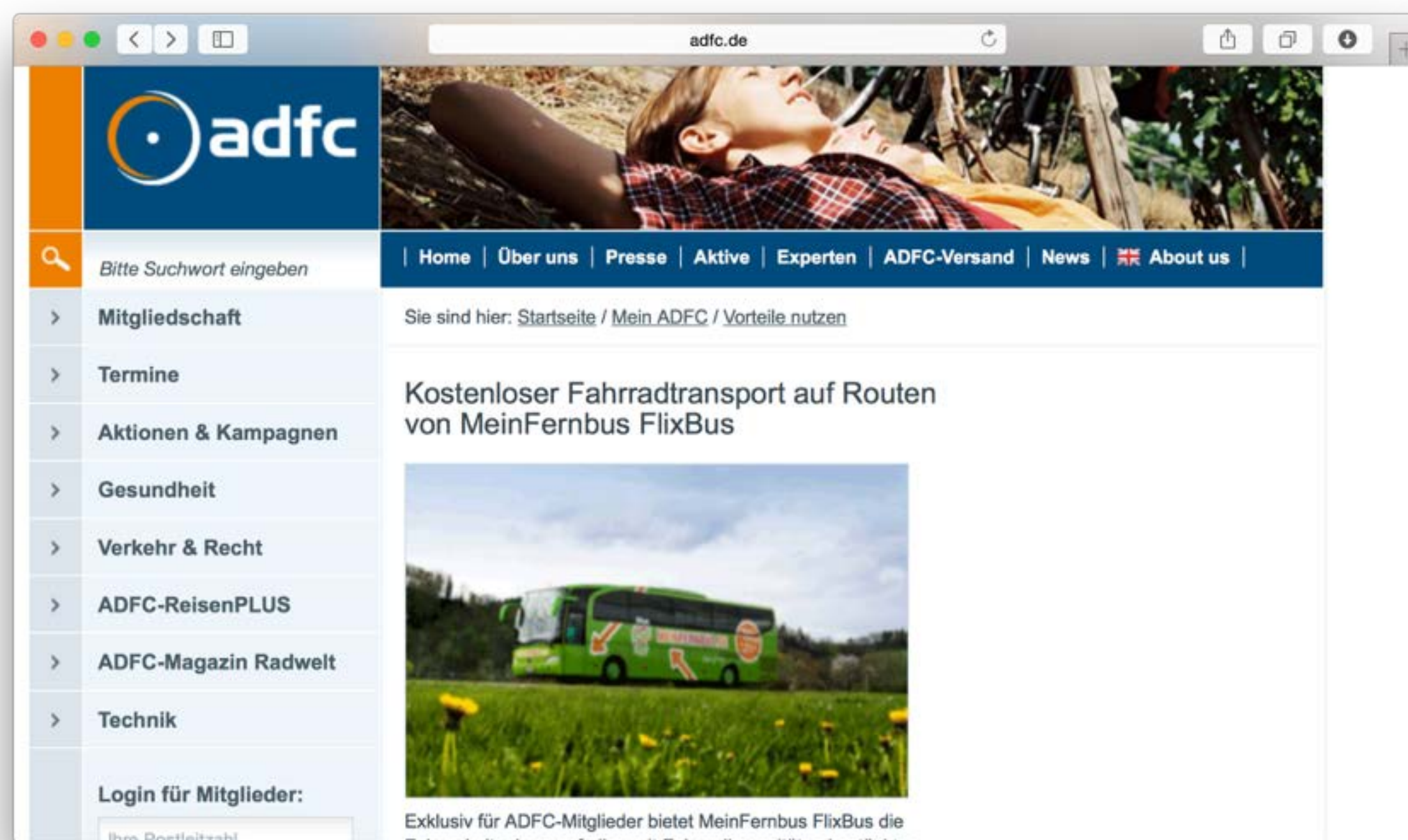
From Paris to London, cycling for 700 km along the Via Claudia Augusta, crossing the Alps on the cycleway München-Venezia or Africa ... doing something extraordinary that is far away from everyday life: it becomes a kind of *must have done* the for modern, urban contemporary.



The possibilities grow and since the success of the pilgrim track of Santiago de Compostela, new ,products‘ and the proper ,merchandise‘ are telling to the consumer: once in your live, just do it!



Travelling by reducing the impact of emissions.
The trekking bikers' satisfaction is inspired also
by ethical issues.



The demand for rail and bike services is growing and also long-distances coaches have caught the opportunity to offer bike transport (also free of charge). For a lot of products labeled eco-tourism, cycling is an integral part of the product-bundle.



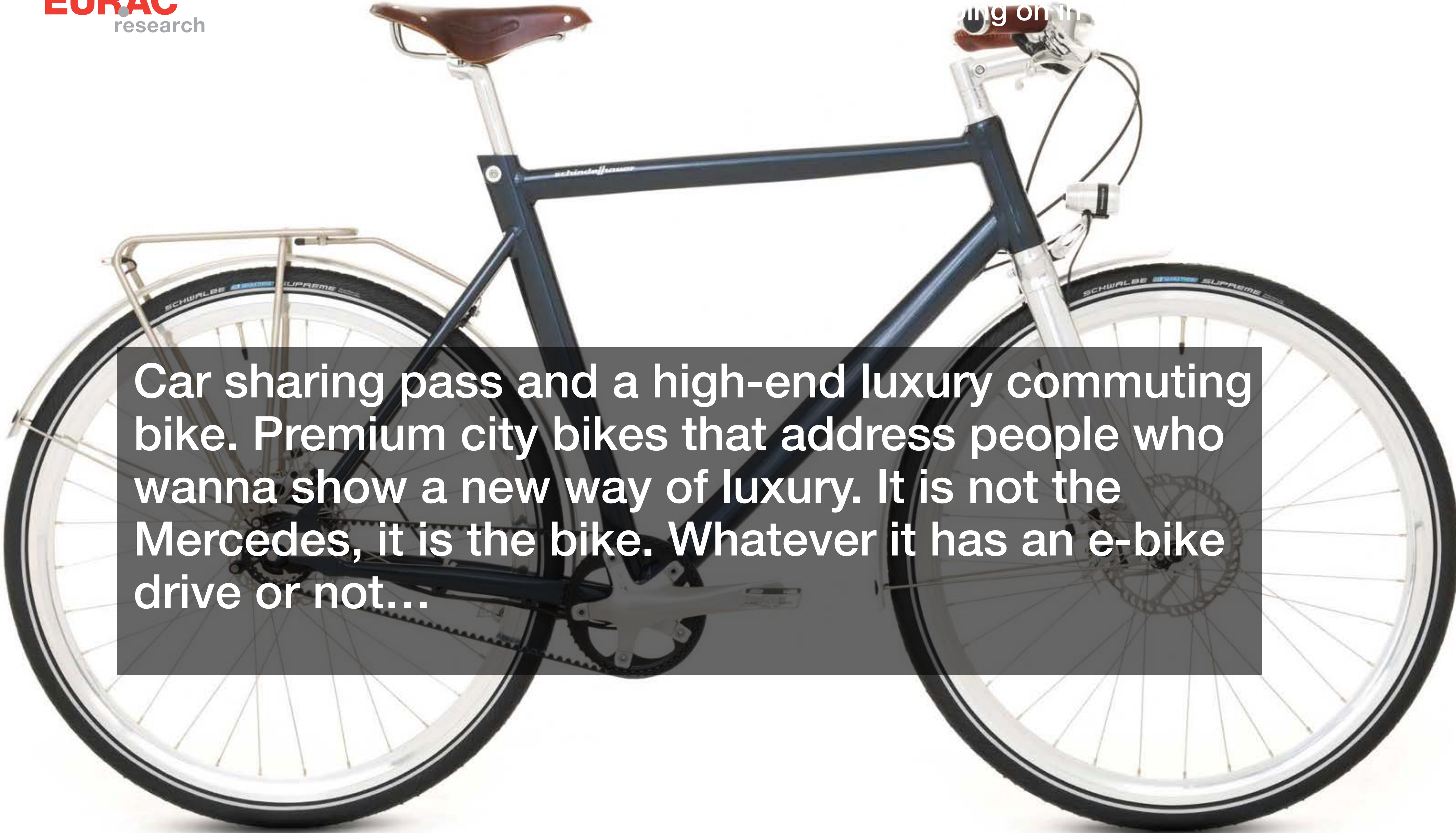
The urban space



A lot of cities try to promote cycling as sustainable, fast and healthy way of mobility. Cycle-highways, parking stations, social campaigning, cycle-cafes, beginner courses... In Western Europe and especially in the Northern countries promoting the use of bicycles becomes more and more an important topic on the political agenda.



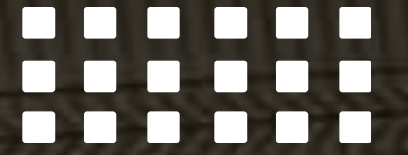
Inspired by bicycle messengers and track bikes, a design and life-style oriented target-group from 20-40 years old is growing in the urban hubs. This group rides fixed and single speed bikes and this specific cultural code is mixed up with their existing life-styles: yuppies, hipsters, punks, lohas, etc.



Car sharing pass and a high-end luxury commuting bike. Premium city bikes that address people who wanna show a new way of luxury. It is not the Mercedes, it is the bike. Whatever it has an e-bike drive or not...



Dirt bikes or gravity bikes are a kind of mix between a hardtail mountain bike and a bmx. The urban space and special show-jumping courses attract the young adrenalin junkies.



criterium races are events that are booming. In all major european and US cities this events are a kind of urban races that combine showtime and athletic performance. The RedHookCrit series which takes place in Ney York, London, Barcelona, Milano and the RadRace series in Germany are the most important events.

So, what lessons alpine destinations can learn?





Events, either for races or car free days are always a valuable strategy to motivate road biker to visit your destination.





**Capitalize the myth of existing
historical routes and be
creative to start a
new heritage.**



**Develop one-stop-shop
accommodation offers
with focus on nutrition and
special therapies
for pre-season.**



**Organize the 1st Alpine
Critérium Race for track bikes
(maybe with an international
partner like RedHook or Rad-Race)**



Find synergies with industry to have access to direct communication and sales channels. There are several companies that sell also travel packages.



[Home](#) > [Travel](#) > [Rapha Randonnées 2015](#) > [Randonnée Corsica](#)

Randonnée Corsica

“Corsica is not France,” read the road graffiti when the Tour visited the ‘Île de Beauté’ in 2013, for the first time in 100 editions. And whoever wrote it was right: Corsica, with its Italian and French history and rebellious, independent spirit, feels far removed from the mainland – and it is all the better for it. With one thousand kilometres of unspoilt palm-

cuisine – it’s an utterly seductive destination for cyclists.

Riders of the Randonnée will explore the island in true Rapha fashion, enjoying a carefully planned route set to

EACH RANDONNÉE FEATURES:

- Groups of 15 riders
- Unique routes, curated by Rapha riders
- Six to nine nights accommodation
- Discounts on Rapha apparel
- Meticulous planning and logistical support
- Pro-level bike hire
- Ride guides, mechanic and soigneur support
- Massage and laundry
- Single-occupancy accommodation
- Jaguar support cars

PAY £500 / US\$800 / €600 DEPOSIT NOW »

PAY £2900 / \$5000 / €3700 BALANCE NOW »

Price based on shared, double occupancy basis. An additional 15%



**Build up a cycling-path network
that also includes secondary
streets (case Mallorca).**



Watch carefully what is going on in the cyclocross/gravel scene. Develop some special gravel routes and/or use this bikes also in your market communication. Events can be a good starting point.



TOSCA
GRAVEL RACE



Develop special camps/offers for women in co-operation with industry or other special interest partners (magazines, fashion, ...).



Maybe the vintage cult is occupied, but the combination of road biking with other life-style oriented issues could create a win-win situation. Have in mind that the road-bike segment grows in the mid and luxury price segment.



**The first velodrome in the Alps?
Maybe also a small infrastructure
could attract this growing target
group interested in track bikes.**





Educate the market: the MTB target group is limited. Hence, your destination strategy should also focus on motivating people to start mountain biking. Beginner's courses, festivals, ...



**Trails can be found everywhere,
but a awesome mountain view not.
Make sure that you offer attractive
routes to the mountain biker and do
not limit the routes on B level paths.**





**Trails can be found everywhere,
but an awesome mountain view not.
Make sure that you offer attractive
routes to the mountain biker and do
not limit the routes to B level paths.**



**Provide service points along the path.
It is not only helpful, but it also shows
that mountain bikers are welcome.
Also to hikers.**





**Balcony trail, Super Sauze,
Sella Ronda, Sunny Benny, ... try to
position at least one trail as product
itself – it should become a *must do*
for every ambitious biker.**



Build up strategic partnership with industry. They have the channel towards the end consumer and together you can create the emotional environment for the rider: technology and landscape.



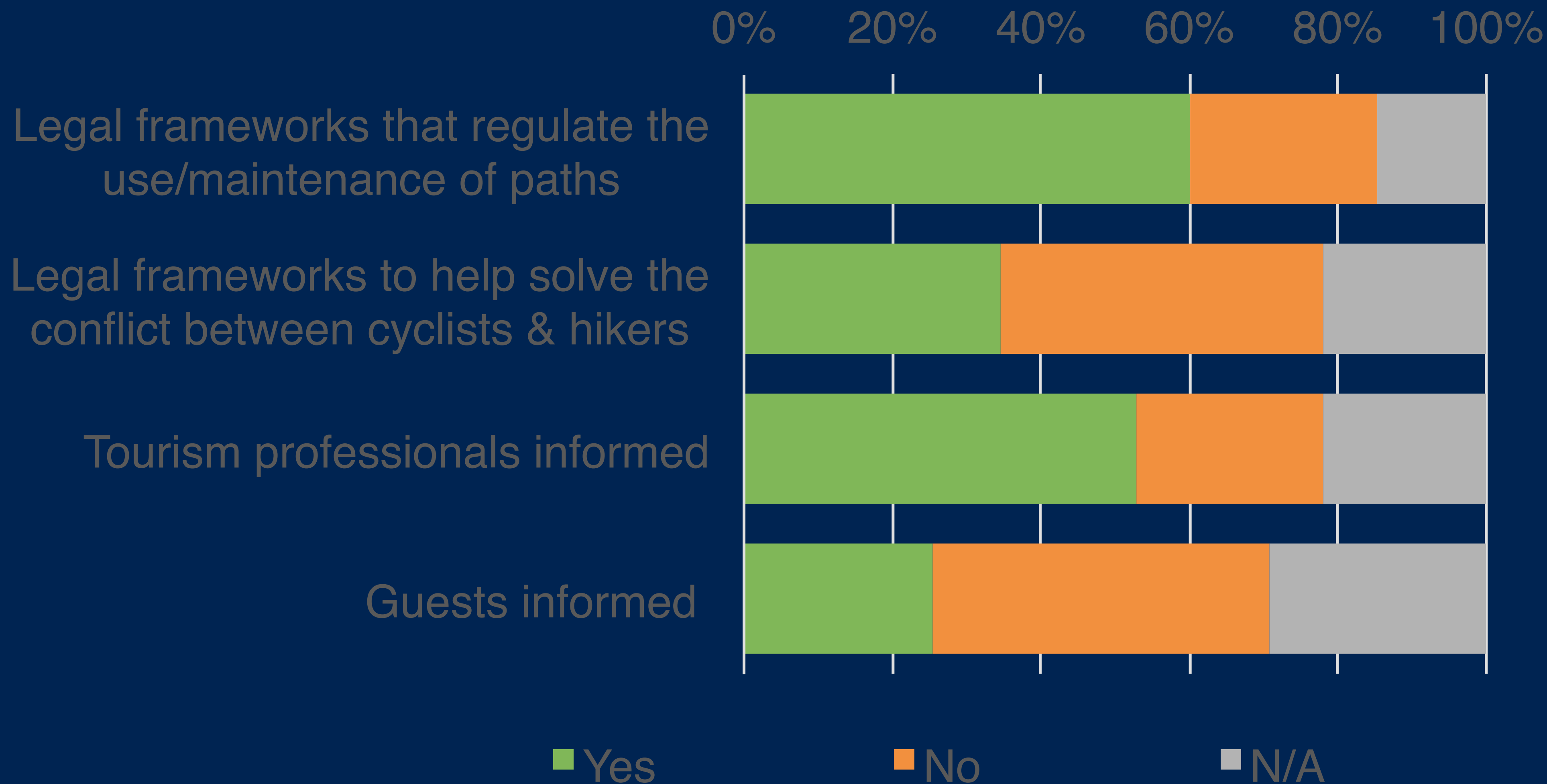
Not everybody is a hero! Make sure that you also offer routes that are attractive, but also limited regarding difference in altitude (500 atm are nice).



Not everywhere a clear regulation concerning the use of trails is established. DMO to-do list: improve communication and sensitize the guest.

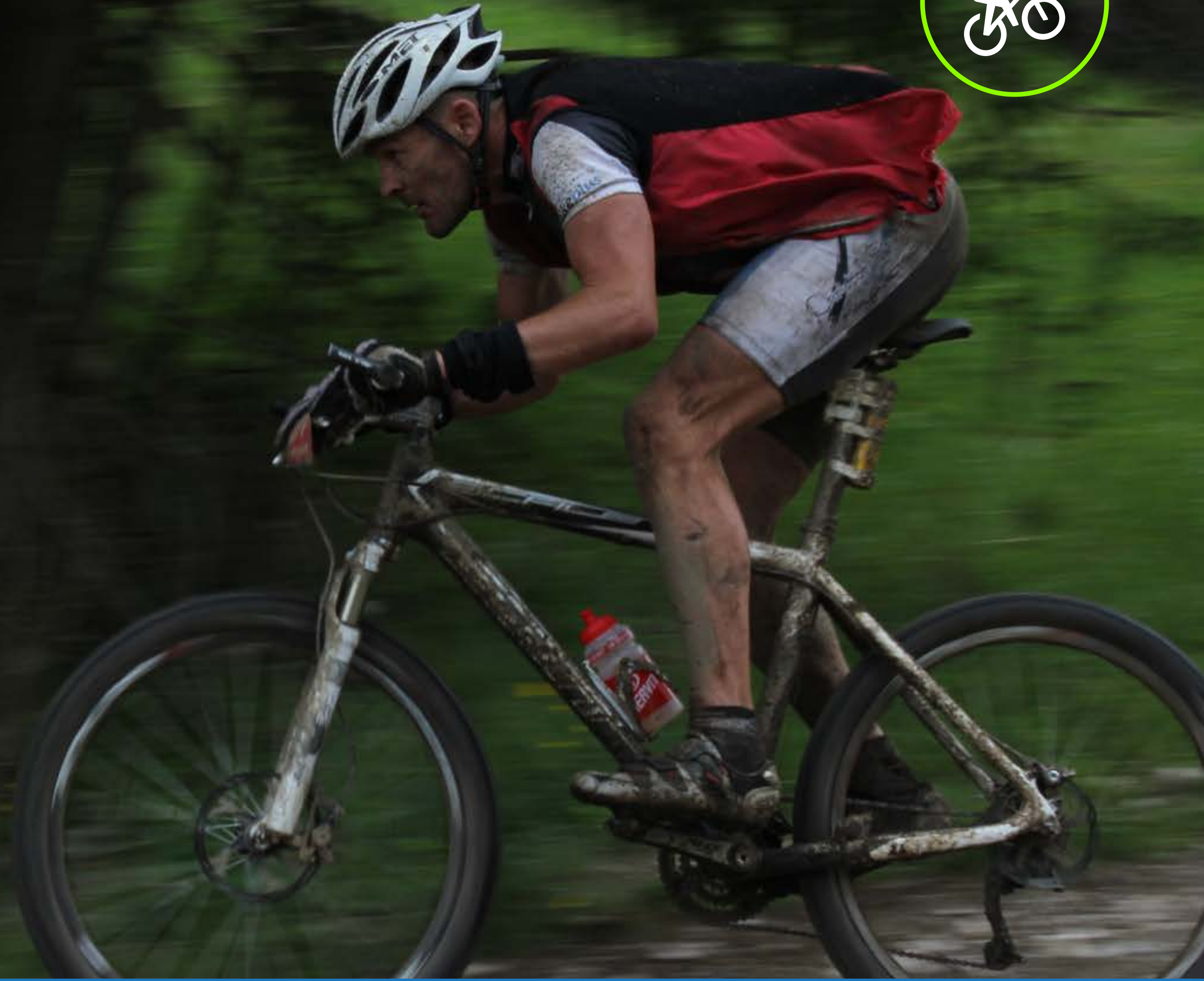


Regulatory framework for the use of trails





Events are always a driver for your destination. But make it special. Just another marathon is not the issue and has not the enough power for story telling.





E-powered mountain bikes are a good idea! Holidays are an excellent occasion to test something new. And the **e makes the Alps flatter. But for a successful strategy you need a state-of-the**e** art rental.**



Alpine skiing, ski freeride, snowboard and backcountry skiing are best suited themes for cross marketing activities. Mountain bikers love those sports too.





**Be part of a trans-national route.
Use this guest as *window shoppers*
and convince them to visit your
region once again.**



Be bike friendly and use this attitude to give your destination a characteristically identity. Specially designed parking lots, signage, city rentals, maps, architecture, ... There are plenty of possibilities to say to cyclists a *warm welcome*.





Offering a cycle path along a river is not enough. Create a network of paths by using also secondary streets and combine various POI like villages, castles, museums, ... to create round-trips. The trekking biker is curious about your destination.



Security is an issues.
Motorized traffic must be avoided.
Sensitize the car drivers that cyclists
are also allowed to use the streets.
The tourist industry should be a
partner when it comes to
strengthen cycling politics.



**Encourage for sustainable mobility.
As a hotel you can offer hotel-bikes
also to non-cyclists. Use this service
to give your hotel a personal note.
Maybe also as a buyable
custom designed souvenir...**



ALEX
HOTEL



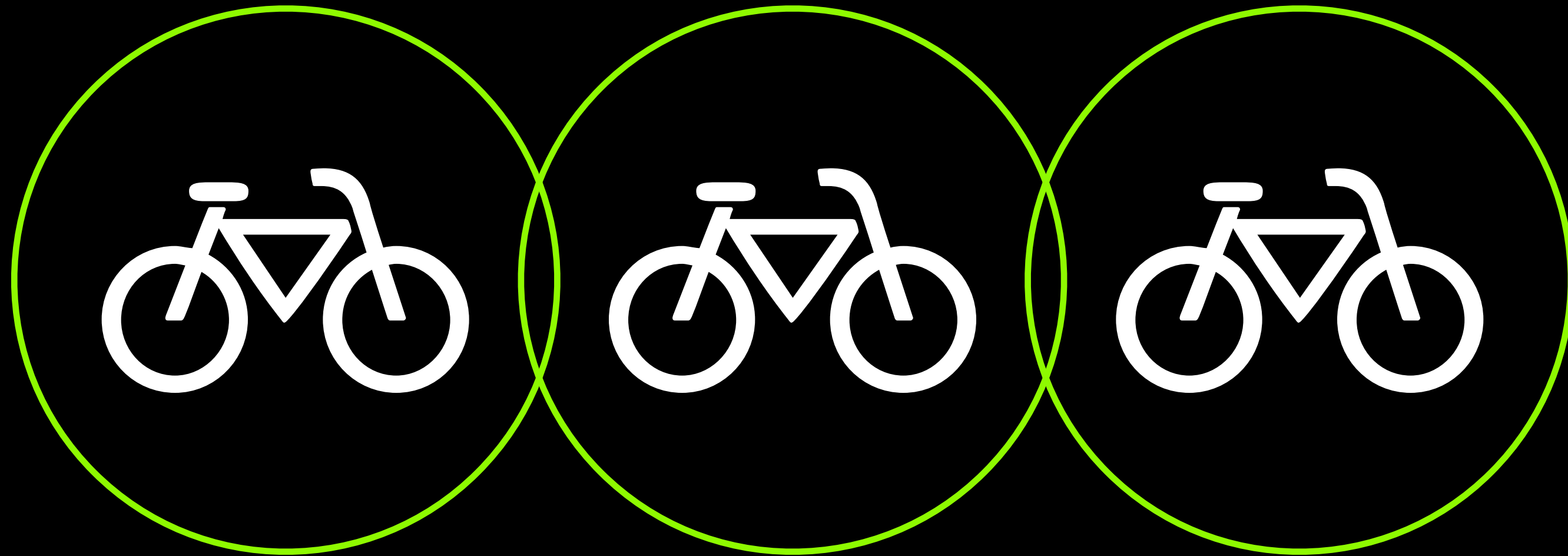
The e-bike technology offers an interesting playground for the further development of trekking biking in the Alps. Especially for a hybrid use (cycle path, road, forestal paths) new opportunities for the traditional segment of trekking bikers can be created.

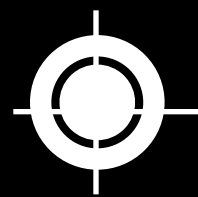




There will be a growing market that we call ,cyclotour'. Cyclists, that like to combine sport, cultural visits, gastronomy, shopping etc. This cyclists are a hybrid between road bikers and traditional trekking bikers.

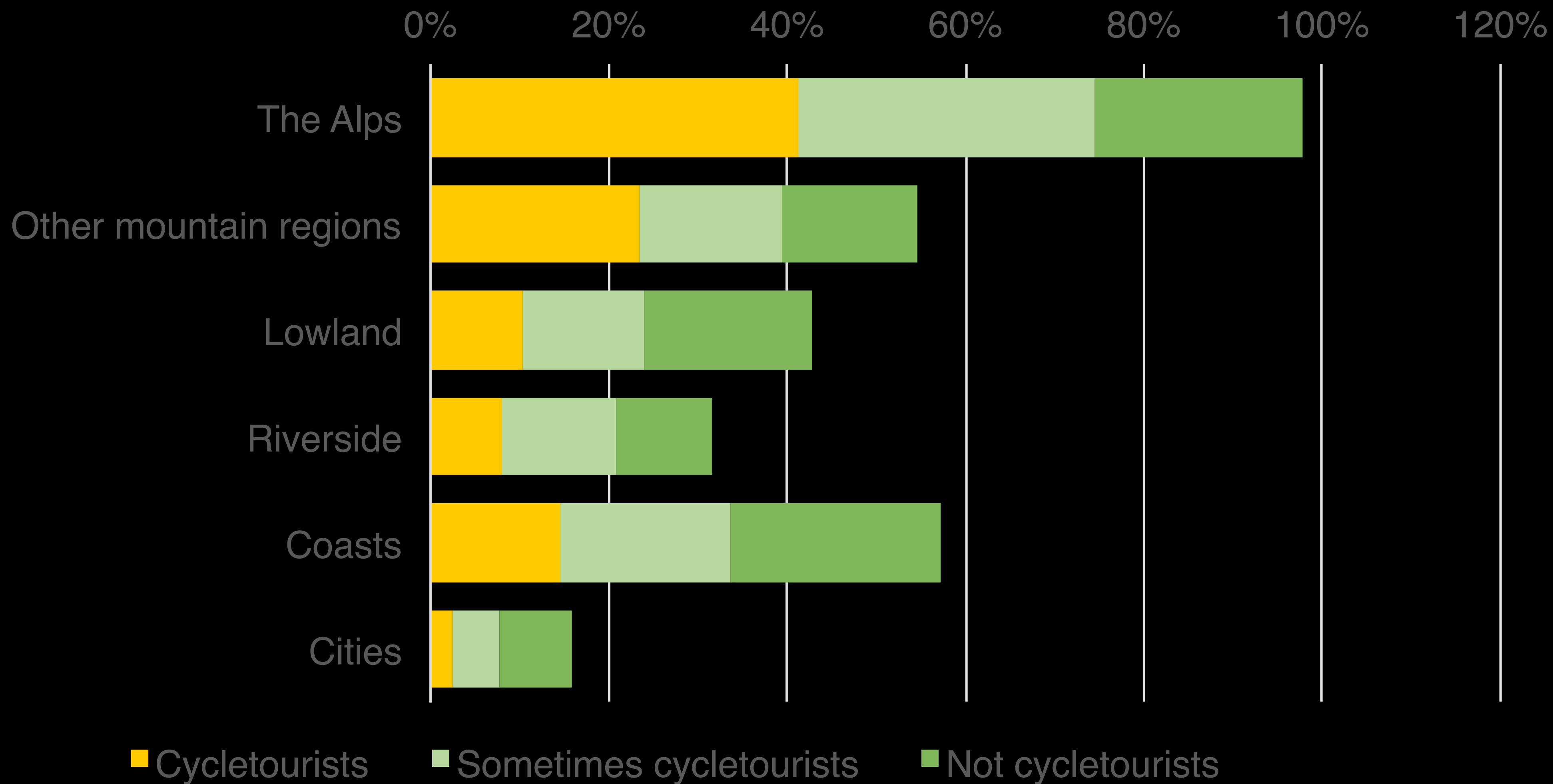


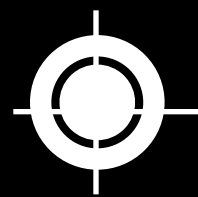




For cyclists with a specific travel experience, the Alps are the maximum. But also for potential cycle tourists the Alps are attractive.

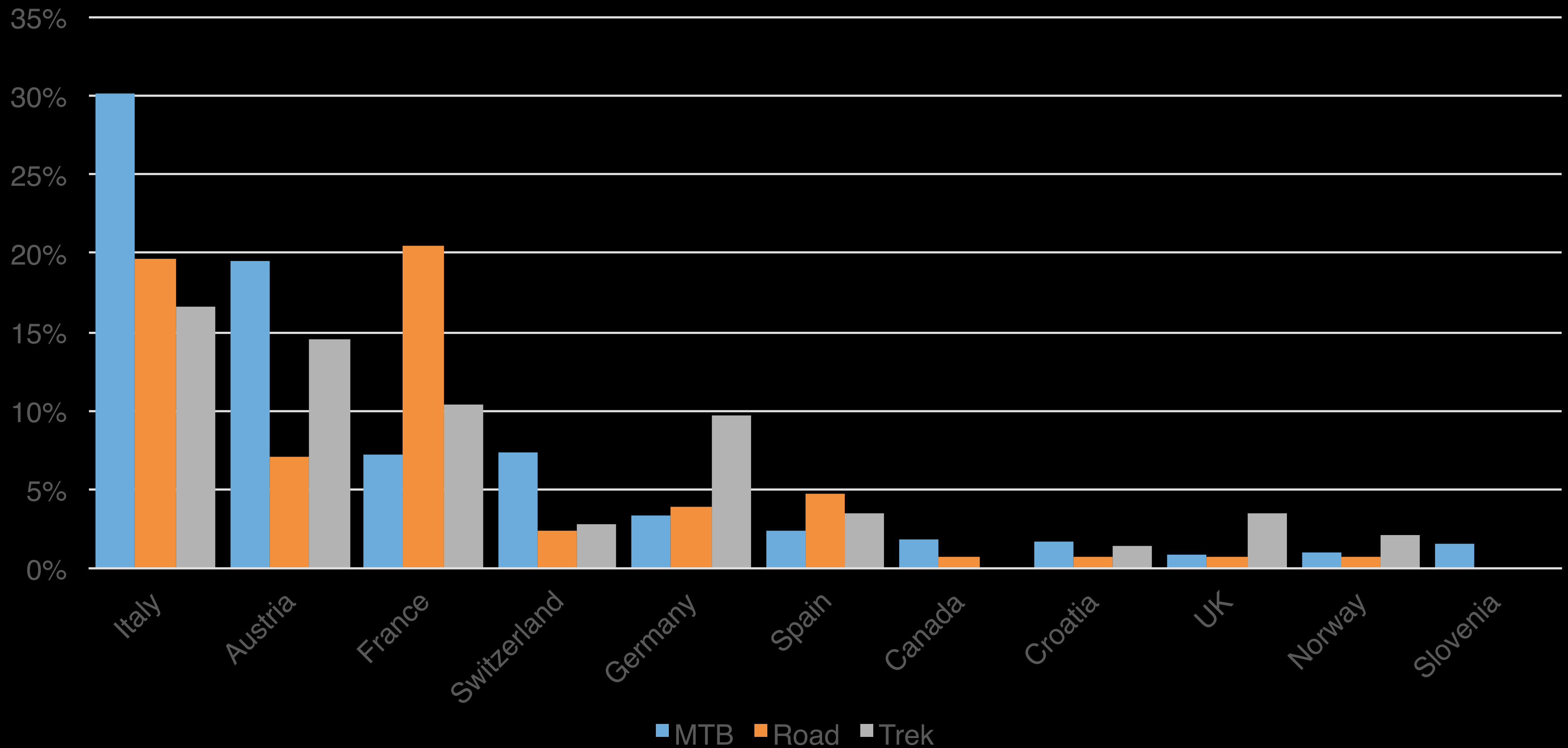
Landscapes that end consumers would choose

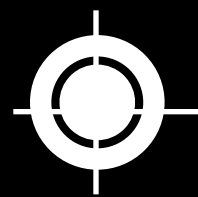




Italy and Austria are the most desired destination for mountain bikers, France the dream for road biker and trekking cyclists love the overall Alps.

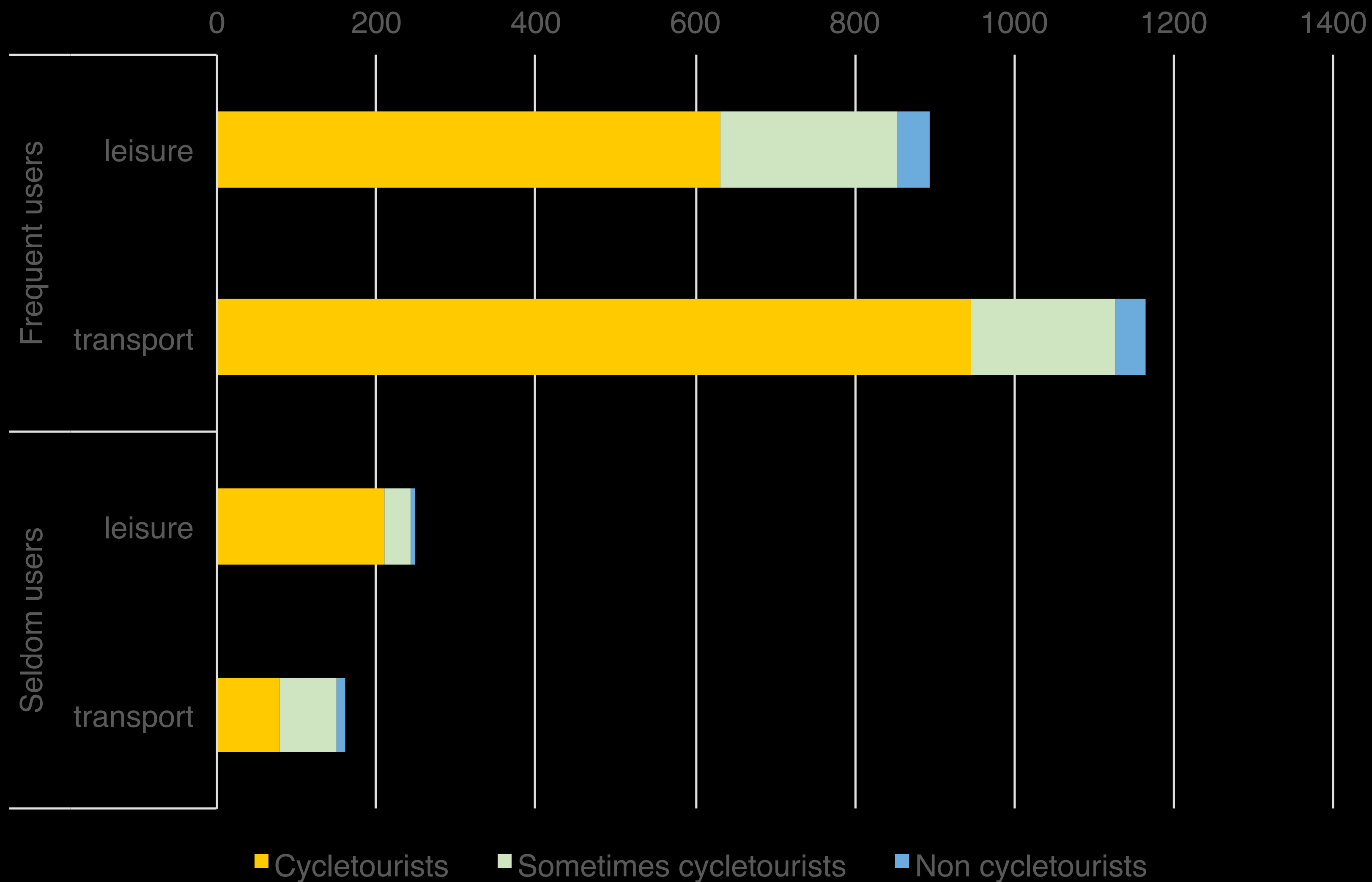
Countries that end consumers would choose

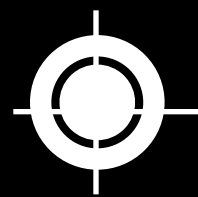




**Cycle tourists love their bikes.
Regular cyclists, for mobility as well
as for leisure purposes, are the
biggest source market for
cycle holidays.**

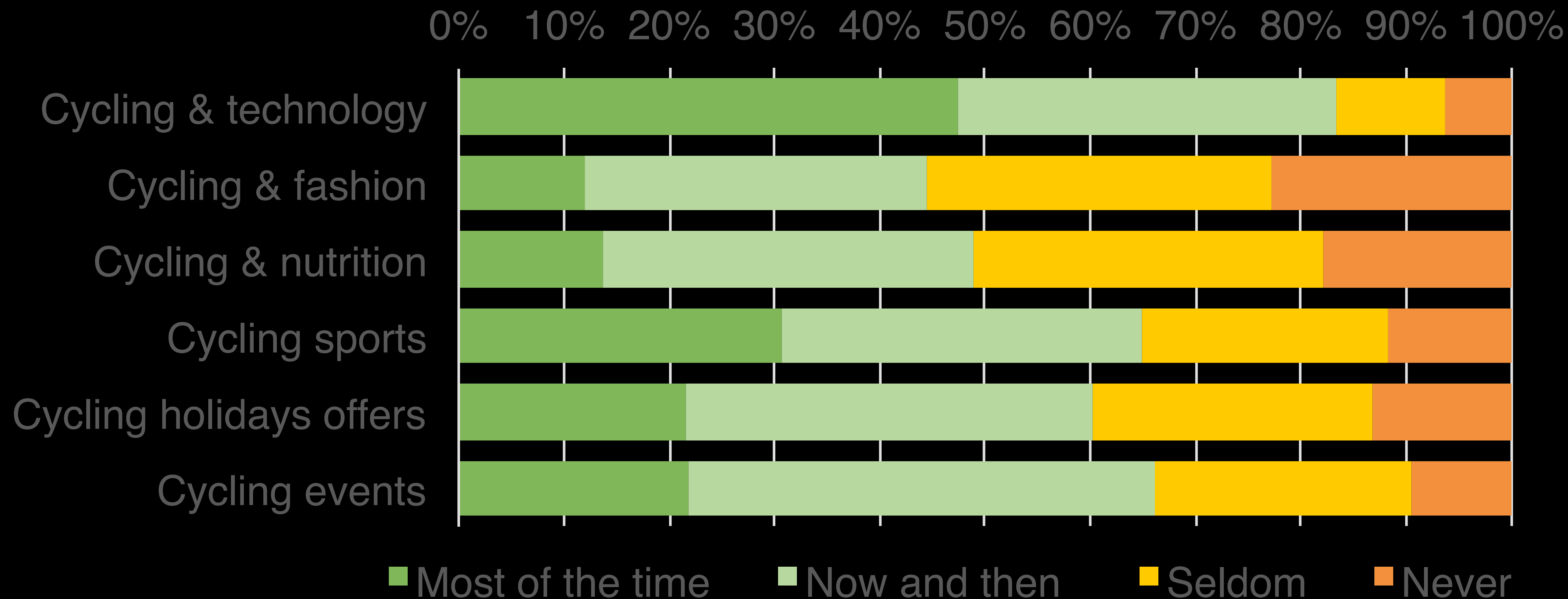
Cycle tourist and bike usage

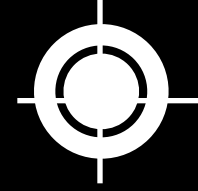




If you as a destination want to have an effective communication, strategic partnerships with industry or other special interest partner are very useful. The general DMO communication tools will not reach cyclists effectively.

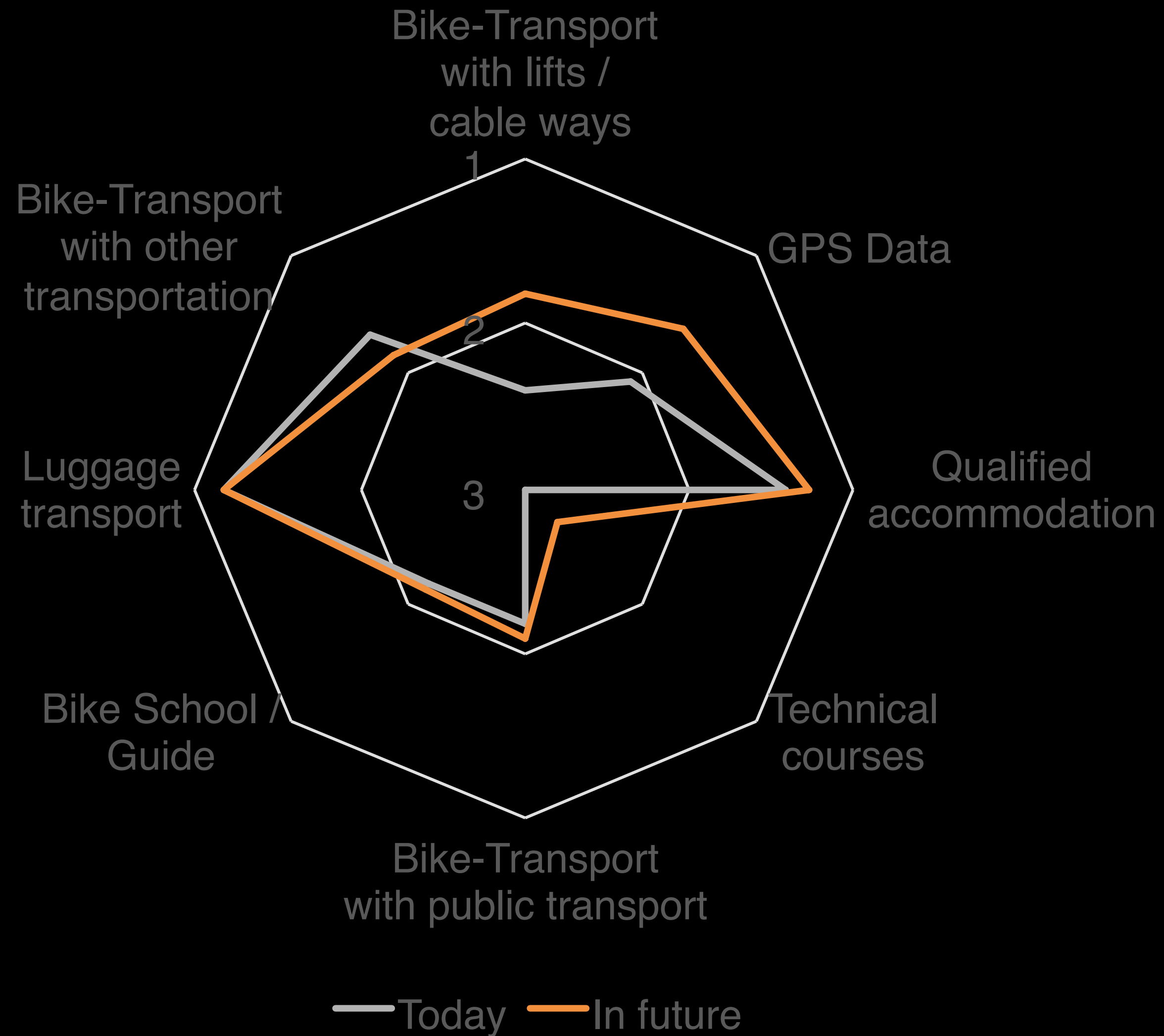
Topics followed by cyclists on a regular basis

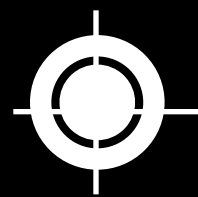




For tour operators, cable-car mobility offers are gaining further importance when it comes to selling all in one packages for the Alps.

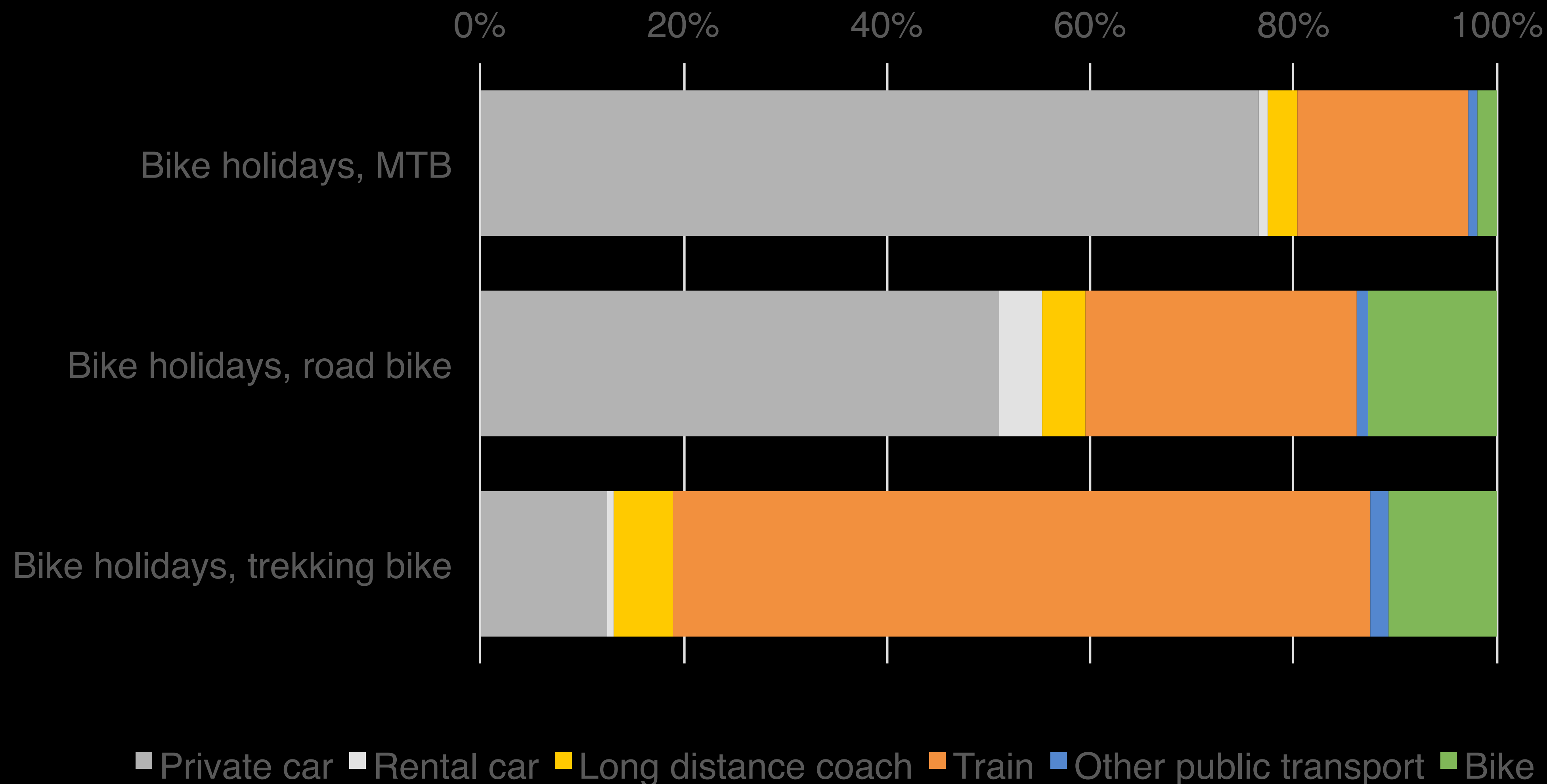
Services for cycle tourists (for packages)

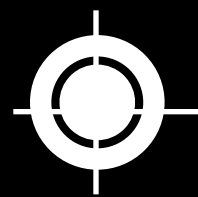




**Being reachable *only* by car
will not help to establish trekking
biking in your destination. This may
also be true for road biking.**

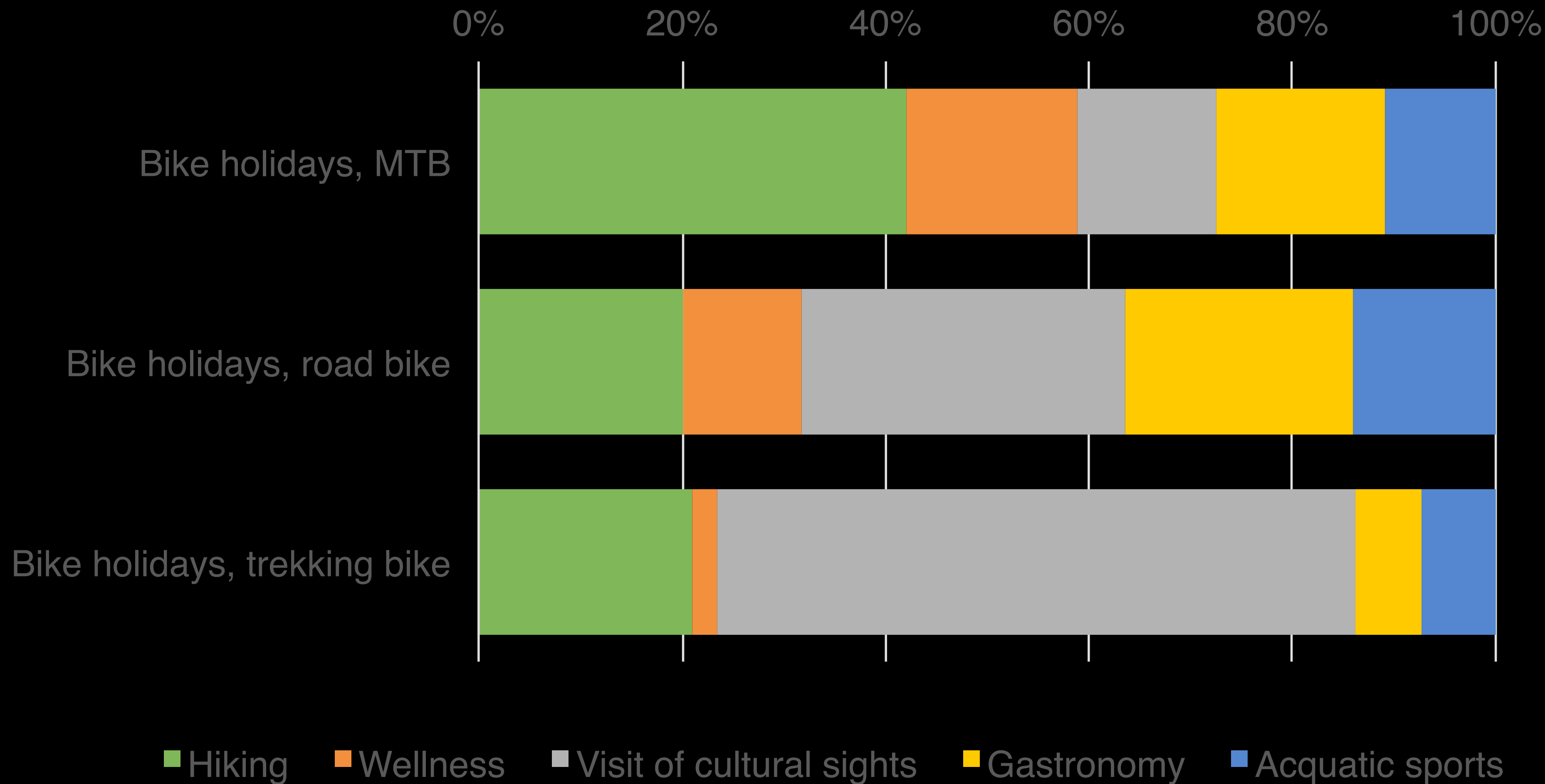
Accessibility from users' perspective





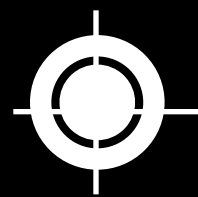
While on holiday, the burned calories of road bikers and mountain biker are best spent in deli food, mountain biker seek for adventure also in hiking and trekking bikers will learn all they can.

Other activities while on bike holidays



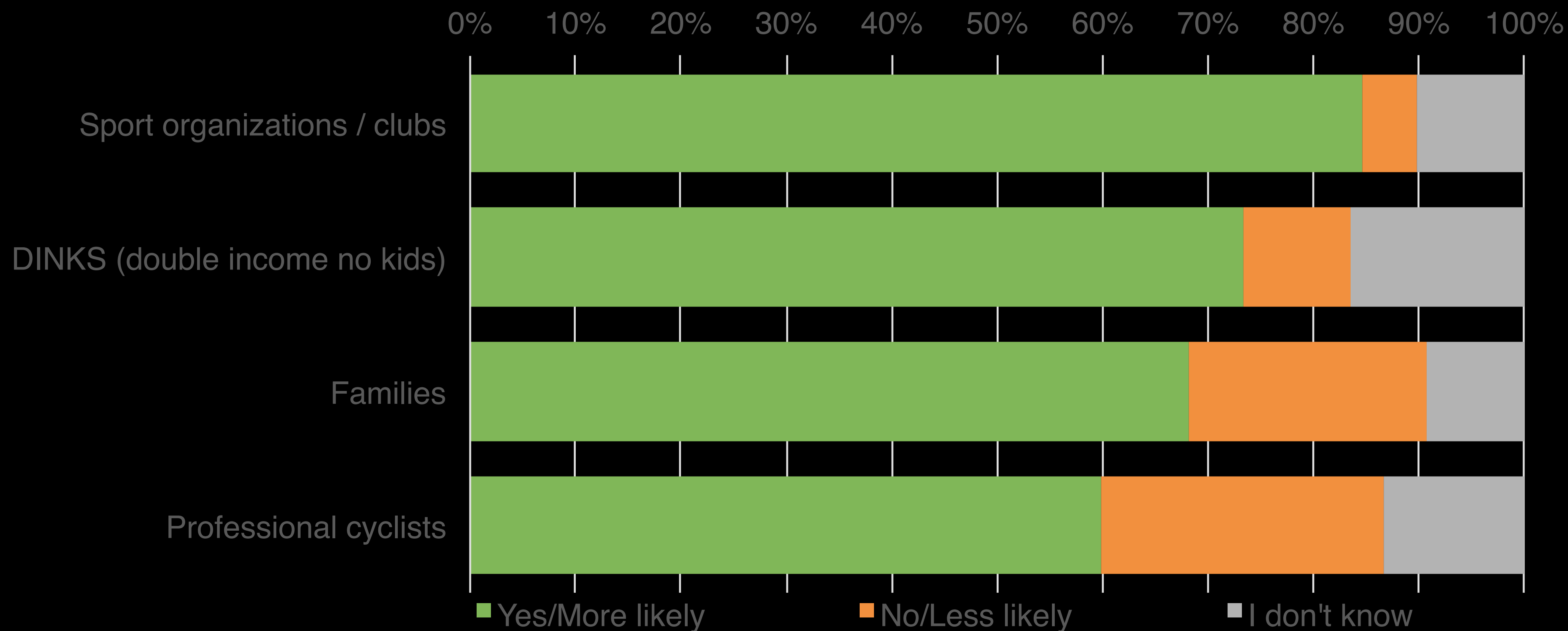


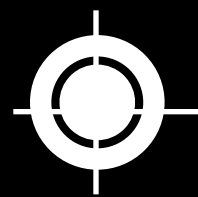
The mountain bike guests' profile will remain more oriented on the life-style of people living in rural areas/countryside. Road bikers and trekking bikers are likely to be more oriented towards urban life-styles.



**Families will not make the market.
Concentrate on groups of friends,
sport clubs, couples. And be aware
that the cycle guest will become *more
and more* professional. And the youth?
It is not an easy task.**

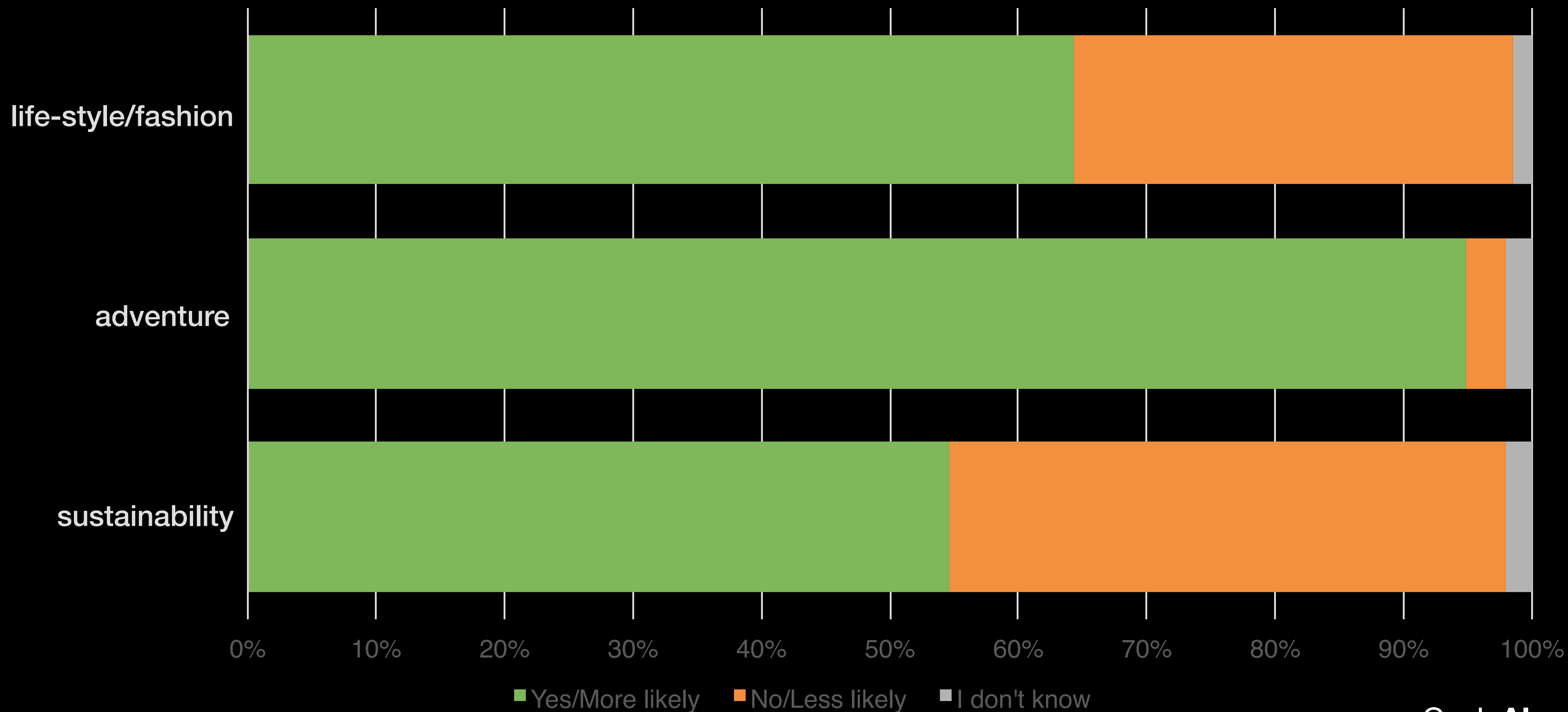
Target group profile for Alpine destinations – industries perspective





**„Adventure‘ is the key issue for
motivating the younger generation
to go on cycle holidays.
Says the cycling industry.**

Which topics are suitable to address young/urban people (U25) for bike holidays?

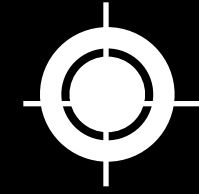




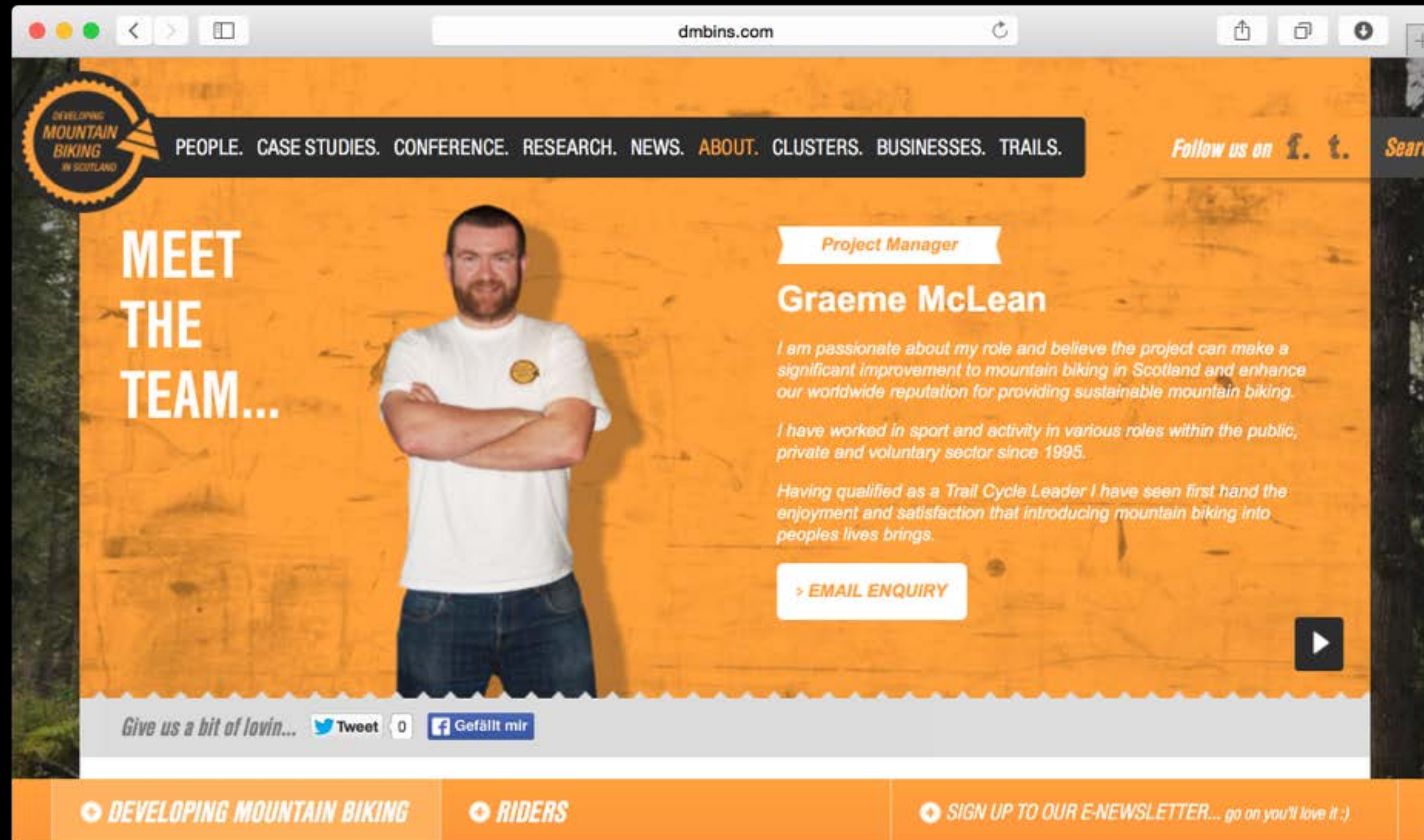
Internationalization as a long term strategy for selected destinations will be crucial to become a hot spot. USA, Canada and Australia have an established road bike and MTB community. Do not forget the high-end rental services...



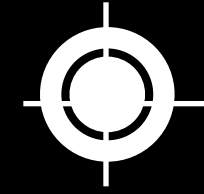
Investments in general cycling infrastructure, co-operation, youth work and in strategies for a sustainable mobility will help to grow also cycling tourism. Hence, tourism industry and politics must work close together.



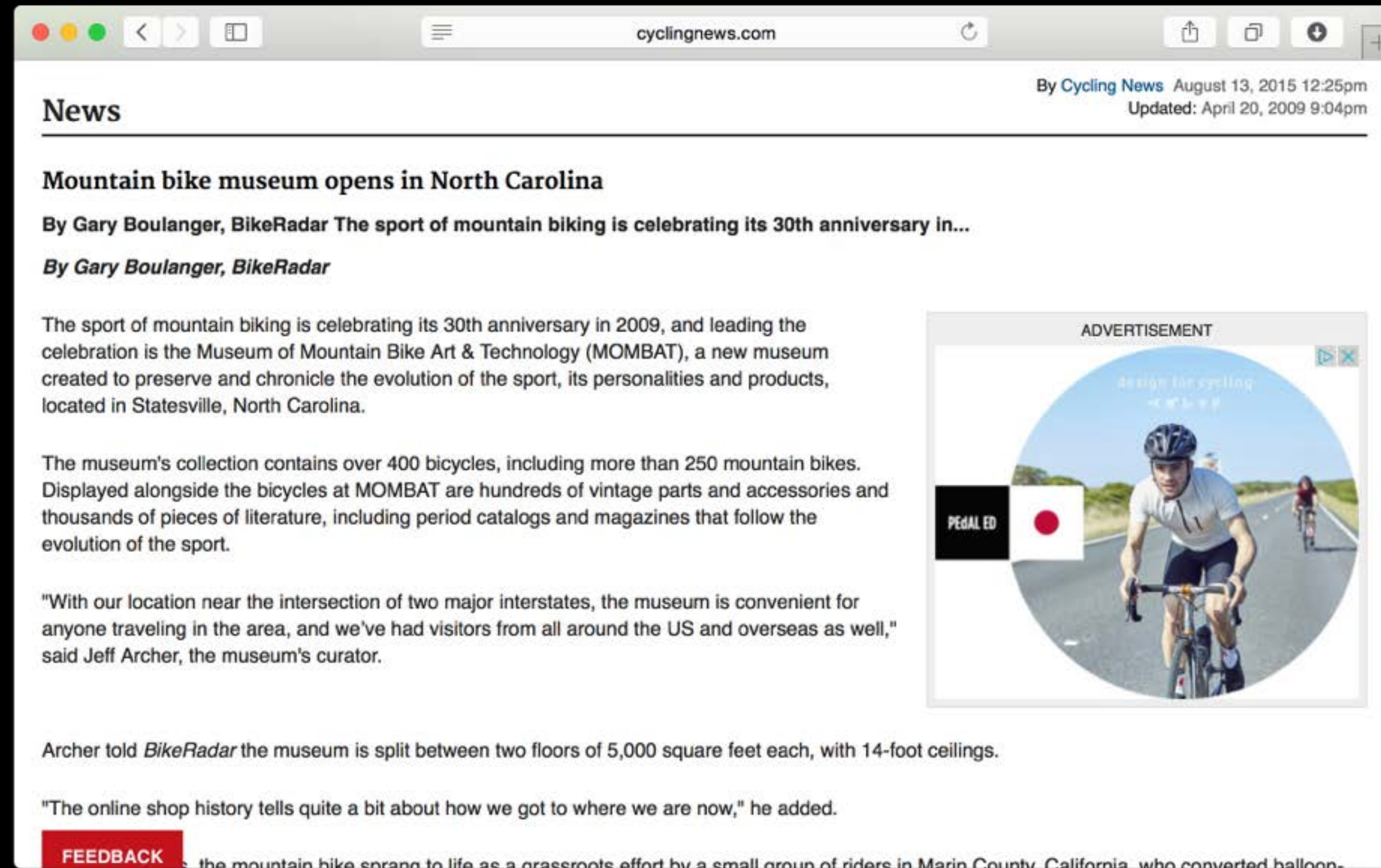
strategic roadmap



The association ,Developing Mountain Biking in Scotland‘ was a central actor in making Scotland a top MTB destination. Youth work was and is one of the centrals aspects of DMBIS operations.



strategic roadmap



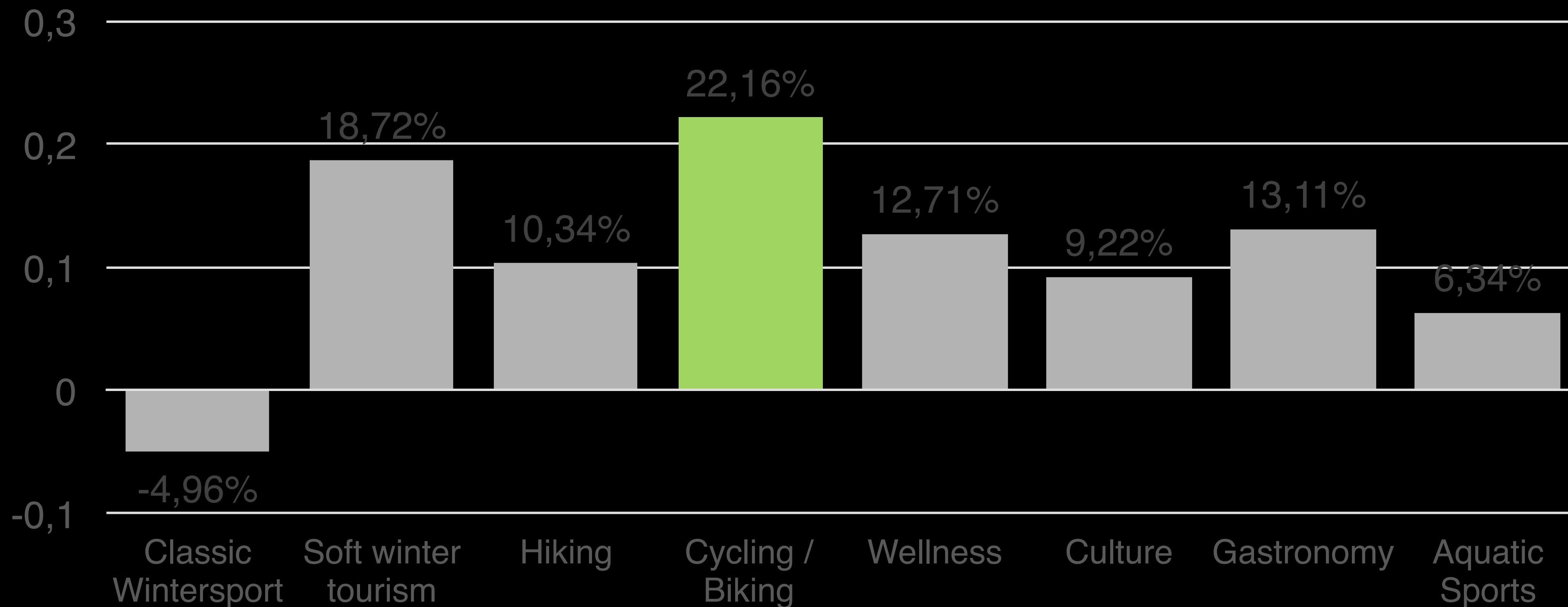
Why not open the first Alpine mountain bike museum?



Destinations are aware of the opportunities of **cycle tourism**. Maybe also as new opportunity to balance the expected difficulties in traditional ski tourism?

As a consequence, cycling tourism for ski oriented destinations is not an operation at product level. It is a **strategic business unit**.

Alpine tourism products: expected trends by DMOs



Special needs of e-bikers?

Charging stations is a nice to have and since a few months there are some cross-compatible chargers on the market. Make sure that within the destination you rely on one technology, because some adapters are always.

Safe lockers are a good idea for charging the batteries, since a battery pack costs a lot. In meanwhile the guest can enjoy the stay.

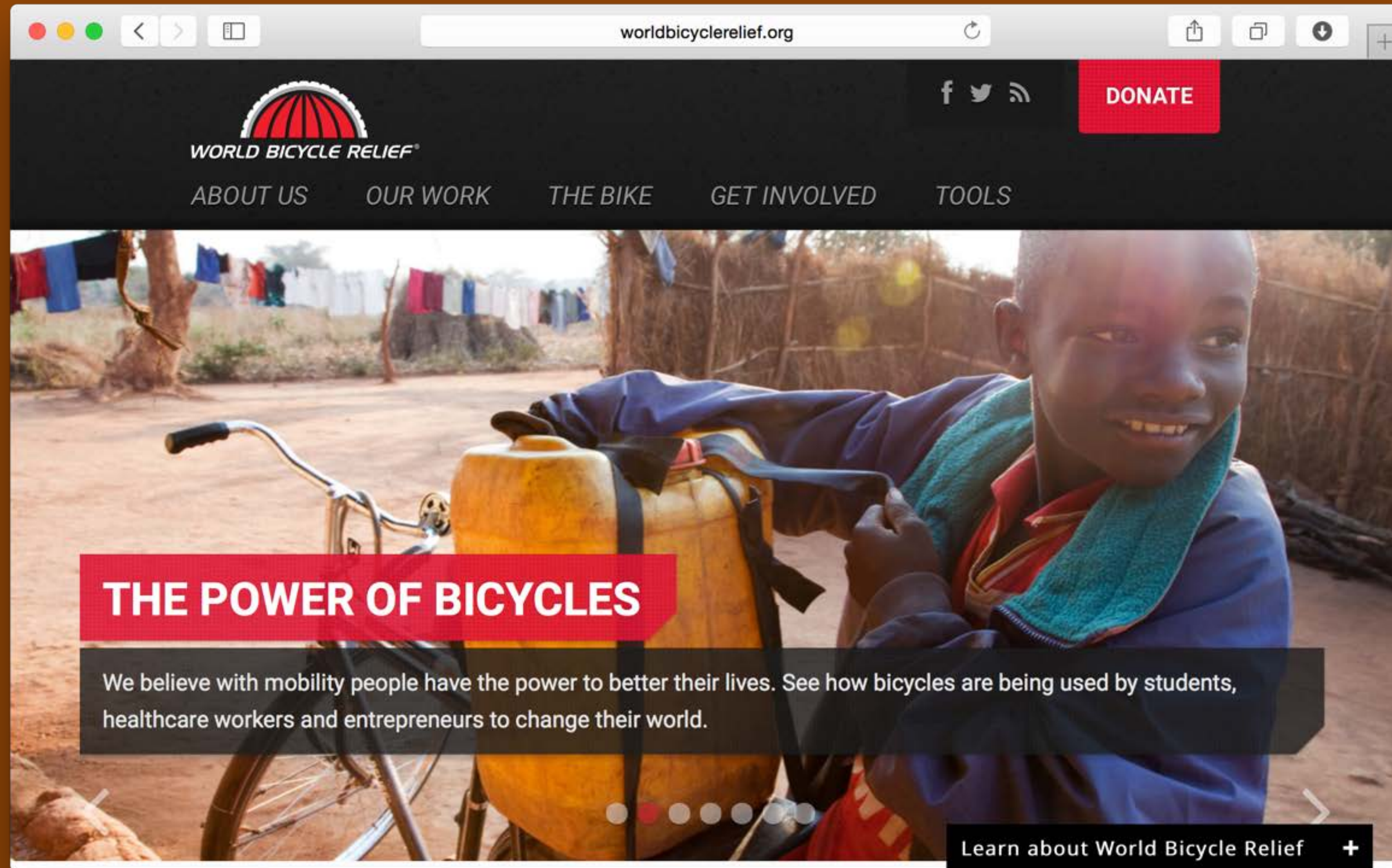
Service points that can guarantee the maintenance of e-bikes (high-tech).

Electricity.





Yes, there is a great future!



A bicycle for a better world! With a donation you can make people mobile: for going to school, to work, call a doctor or send an important email. A complete bike for the price of a good looking jersey will help people to grow.

Thank you for attention.

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ALPINE BIKING TOURISM

The Future of Cycle Tourism in the Alps

