



# Rhine Cycle Route

## Market Analysis Report on the Rhine Cycle Route

Long Version



## Customer



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# 1. Introduction

The river Rhine connects four classical and popular European bicycle destinations: Switzerland, France, Germany and the Netherlands. These four partner countries have from 2005 – 2007 further developed a transnational long-distance cycle route along the river Rhine – the Rhine Cycle Route.

In the “DEMARRAGE” Project, which started in 2009 and is funded by Interreg IVB, the transnational economic potential embedded in the territorial assets of the Rhine corridor should be developed for the tourism services sector, in particular in the growing market of long-distance cycling. DEMARRAGE is a transnational project with 18 partners from the countries mentioned (plus Belgium) under lead partnership of the Euregio Rhein-Waal, a German-Dutch organisation. It is aimed to create the necessary organisational framework, implement a joint marketing programme and initiate business co-operation on the transnational scale of the Rhine corridor. The project does consist of four work packages of which one is the “Transnational marketing of territorial assets”.

As a first action the present Market Analysis Report was commissioned by the project partners. The aim of the analysis is to evaluate the potential of the transnational long-distance cycle tourism in the partner countries and identify so far unused potential of the Rhine Cycle Route that could be activated.

The following methods were chosen to implement the assignment of tasks:

- Examination and comparison of international **secondary literature** (studies, surveys, newspaper articles, presentations etc.) provided by the contracting body and from own sources.
- Collection and analysis of **print material** such as brochures, flyers, catalogues etc. so far used by the different partners for the marketing of the Rhine Cycle Route.
- Written **questioning of the partners** about products, offers, routes, services, accommodation, gastronomy, transport, target groups, marketing, activities etc.
- **Expert interviews** with stakeholders from different countries and with various professional backgrounds.

The Market Analysis Report is a comprehensive analysis of the international cycle tourism market; however it does not claim to be a complete comparison of all sources of literature and other considered materials. That would be neither feasible nor appropriate, because methods, parameters and credibility differ considerably. Instead, the most significant aspects from the view of the research issue are selected and focused on.

The report does contain the following chapters:

- Market of the cycle tourism
- Product analysis Rhine-Cycle Route
- Strategies for product-market-combinations
- The 10 most important results

The goal of the Market Analysis Report is to determine and position the Rhine Cycle Route in the international market in terms of trends, size and growth potential of cycle related markets. The expectations and needs of target groups have been identified to examine customised distribution channels and marketing instruments to attract new tourists and commit frequent guests to the Rhine Cycle Route.

The market and product analysis lead to concrete recommendations how to implement a joint marketing and distribution programme and initiate business co-operations on transnational scale, so that added value for regional entrepreneurs and cycling tourists is generated.

However, the Market Analysis itself does not change anything; it is only a starting point. The big challenge is the development and implementation of the concrete measures. The basis for the success of the Rhine Cycle Route is an efficient transnational co-operation based on confidence, common aims and standards. The transnational project communication and management needs to manage language, administrative and national borders and create identification with the Rhine Cycle Route among the various stakeholders.

The Market Analysis Report serves as a basis for the development of the transnational Marketing Programme of the Rhine Cycle Route.



## 2. Market of cycle tourism

### 2.1 Potential and status of cycle tourism

#### 2.1.1 Economic impact of cycle tourism in Europe

The economic importance of cycle tourism in the European tourism industry has been very high over the past couple of years and still keeps - according to literature, market research and expert knowledge - increasing. The cycle tourism in the European countries of the Rhine Cycle Route developed differently. Unfortunately there are no common methods of data collection in all partner countries, so that an overall comparison has proved to be difficult. It is noticeable that the most comprehensive market research of cycle tourism is done in Germany. Therefore in this analysis German data are more often quoted than data from other countries.

Regional studies (e.g. ETI 2007 for Rhineland Palatinate) show significant differences on the local and regional scale. For example the level of expenditure correlates with rural or urban destinations and with the individual price level presented by service providers.

On the other hand the differences on a national scale can sometimes be neglected because the cycling tourist does not change his behaviour at the borders.

Unfortunately there are not many studies available comparing the national similarities and differences in Europe. One of them is a study published by the European Parliament.

The facts and figures below show clearly the **high economic impact of bicycle tourism in general**. However, these figures have to be regarded cautiously as they are based on estimations and key facts such as supply and demand, size of population, national and international tourist flows and sometimes differ considerably from the figures in national studies.

#### Estimated economic impact of cycle tourism in Europe

Country	Daytrips (10 <sup>6</sup> )	Overnight trips (10 <sup>6</sup> )	Daytrips (Billion €)	Overnight stays (Billion €)	Total (Billion €)
Switzerland	68	0,5	1,11	0,18	1,29
France	919	9,9	15,03	3,49	18,53
Germany	749	5,7	12,25	2,01	14,26
Netherlands	138	1,0	2,26	0,36	2,16
<u>Total</u>	<u>1874</u>	<u>17,1</u>	<u>30,65</u>	<u>6,04</u>	<u>36,24</u>
<i>Europe</i>	<i>2770</i>	<i>25,6</i>	<i>45,32</i>	<i>9,04</i>	<i>54,35</i>

Source: European Parliament 2009

The partner countries of the Rhine Cycle Route generate about two thirds of the whole European annual turnover in bicycle tourism.

### 2.1.2 Key facts of cycle tourism in the DEMARRAGE countries

The economic impact of the **German cycle tourism** amounts to a net value-added of 5.55 Billion € per year. Given the assumption of an average income of 25.000 € per year, 221,841 employees work in a job related to bicycle tourism (Trendscope 2010).

In **France** the total turnover of different industries (bicycle producers, retail, building industry, tourism industry and others) related to cycling is estimated 4.5 Billion € per year, of which the tourism industry benefits with 44 % (1.9 Billion €, only cycle tourists, no day trips have been taken into account) and 35,000 employees. The total spending of cycle tourists, including day-trips, amounts to 5.6 Billion € per year. The French hotel and restaurant industry covers approx. half of their income by cycle tourists (Atout France 2009).

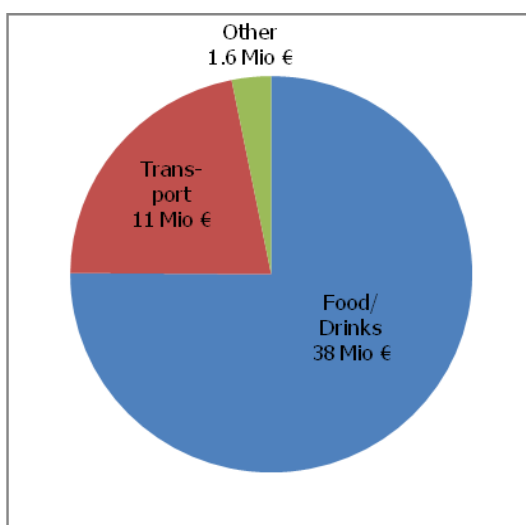
Research in **the Netherlands** (Zicht op Nederland Fietsland 2009) shows that cycle tourism by the Dutch people in their own country is very popular: 8.5 million of the (16 million) Dutch yearly make about 200 million recreational cycle tours with their 18 million (!) bicycles and about 1 million cycle holidays (holidays with cycling on more than half of the days). This leads to an annual turnover of 750 million €, of which 400 million € are caused by day trip cyclists and 350 million € by holiday cyclists. From 2002 to 2007 the spending increased by 34 % in the Netherlands.

Exemplary data from **Switzerland** is introduced in the following chapter.

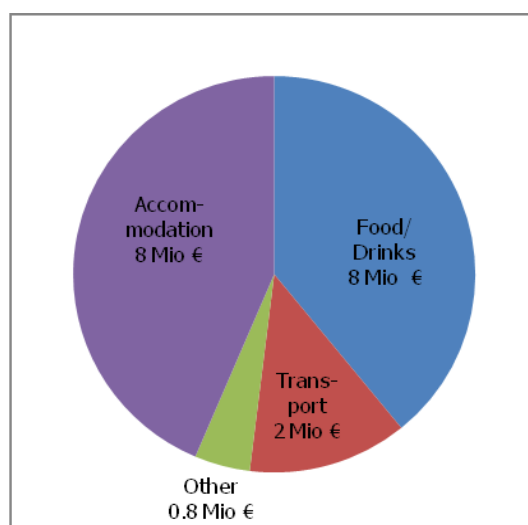
### 2.1.3 Expenses of cycle tourists and their impact on different economic sectors

Due to different methods and parameters some regional sources calculate different amounts of turnover generated by cycle tourists: The example of **Switzerland** (SchweizMobil 2009) shows, how the calculated annual turnover of 117.4 Mio. € is divided into the different business segments (food & drinks, accommodation, transport and others):

**Annual turnover day trips: 50.6 Mio €**

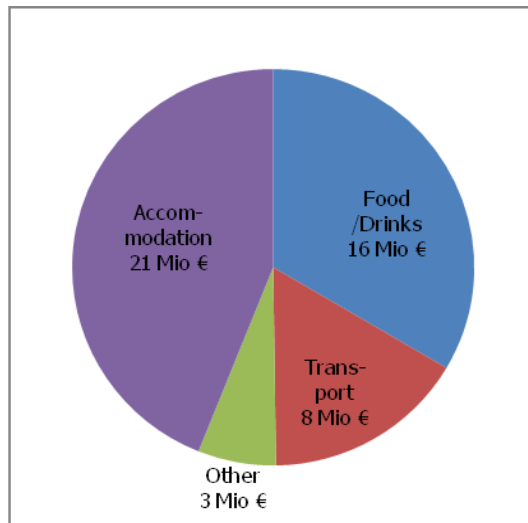


**Annual turnover short trips: 18. 8 Mio €**

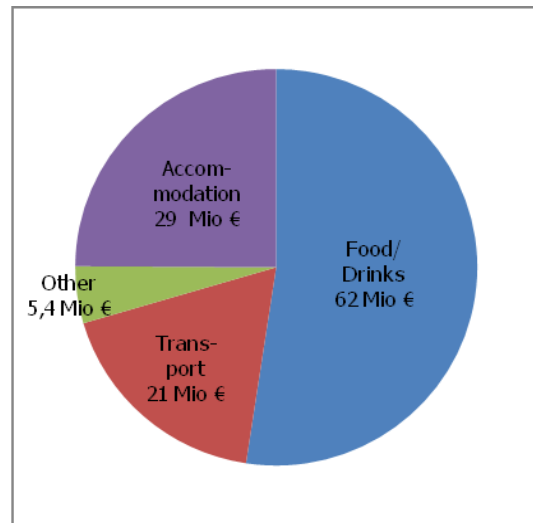




**Annual turnover vacation trips: 48 Mio €**



**Total annual turnover: 117,4 Mio €**



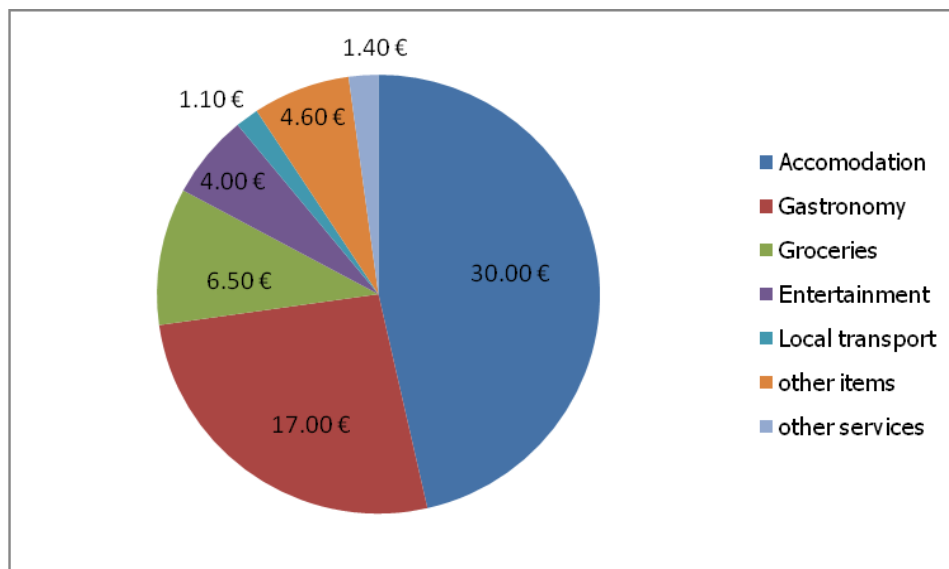
Source: SchweizMobil 2009

#### 2.1.4 Daily expenses of cycle tourists

The **daily expenses of cycle tourists** (overnight and day tourists) do not only have an impact on restaurants and accommodation providers but also on associated industries like transport, retail and service providers.

Results of a national market research in Germany show exemplarily the share of different sectors in the daily expenses of cycle tourists:

**Expenses of overnight tourists in Germany per day: 64.60 € in total**



Source: DTV 2009

Other sources (e.g. Trendscape 2010, ETI 2007 and Eurovelo 2009) state an **average amount around 53 €** that bicycle tourists spend per day. In **Switzerland**, the **Netherlands**, along the Danube and in Austria in general overnight tourists even spend more than 70 € per day. In **France** the figures vary from 52 € (regional cyclist who stay in one accommodation) to 67 € (touring cyclists that change accommodation almost every night) (EuroVelo 6, 2008).

Various sources point out that **cycling tourists spend more money than other tourists**, because they show motivation and commitment and reward themselves with quality meals and accommodation.

#### Recommendation

The above figures and tables show that day trips (although spending is lower) generate in total a higher turnover than trips with accommodation, because of their large number. Mostly accommodation and gastronomy providers, but also retail, transport, entertainment and other branches benefit from cycle tourism. For the product development of the Rhine Cycle Route the economic importance of day trips should be kept in mind.

In 2010 one fifth of the German population above the age of 14 undertook a bicycle vacation with at least one night in an accommodation. This shows a remarkable volume. Half of the Germans can imagine undertaking a vacation, where a bicycle will be used, while 38 % clearly exclude this option. These figures give substantial information about the potential. The potential of frequent guests completes the picture: Only three percent of former bicycle tourists cut out another bicycle vacation while 87 % intend to repeat it. Also half of the day trip cycling tourists can think of a bicycle vacation. **River cycle routes are often the favourite choice.**

Between 2008 and 2010 a significant increase in the German cycling tourism took place:

#### Economic impact of cycle tourism in Germany<sup>1</sup>

	Days of cycle tourism	Nights of cycle tourism	Net value-added vacation	Day trips	Net value-added day trips	Net value-added TOTAL
<b>2008</b>	45 Mio.	39 Mio.	2.10 Billion €	620 Mio.	3.43 Billion €	5.53 Billion €
<b>2010</b>	52 Mio.	46 Mio.	2.30 Billion €	549 Mio.	3.25 Billion €	5.55 Billion €

Source: Trendscape 2010

### 2.1.5 Status and potential of cycle tourism in the DEMARRAGE partner countries

Although reliable data bases for valid and comparable statements about the potential and status of cycle tourism do currently not exist, expert opinions and market research show **high or very high potential** in cycle tourism in the DEMARRAGE partner countries:

<sup>1</sup> Explaining how exactly the total amounts are generated would go beyond the scope of this figure, because the parameters changed from 2008 to 2010. Different factors were taken into consideration and diverse formulas were used in order to adjust the calculation. For details please refer to Trendscape 2010, p. 115 ff.

In **Switzerland** cycle tourism is a quite new but very professionally equipped branch. Due to topography cycling for commuting purposes is not very common. Still very interesting offers, products and high quality infrastructure are suitable to develop the inactive potential.

In most regions of **France** cycling tourism started off just a few years ago. After years of decline, the cycle use of the French population started to increase in the late nineties. In the region Alsace cycling is more popular than in the other regions and cycling tourism has already been promoted for years. A national initiative has started a structured evaluation the potential of cycle tourism and to define a strategy how "Alsace à vélo" can be further developed and the marketing and promotion can be improved. The potential to further develop the cycle tourism market in France is quite high. Besides the cycle routes the so-called "voies vertes" (routes dedicated to non-motorised vehicles and pedestrians) are attractive for cycle tourists.

In **Germany** the bicycle tourism market is very well developed. In some segments the supply already exceeds the demand. The inactive potential is certainly smaller than in the other partner countries, yet the market is very lively and will maintain its high level.

In **the Netherlands** cycling is extremely popular; however, cycling for recreational purposes and the approach of new markets provides additional potential.

For the development of the Rhine Cycle Route it is important to emphasise, that statistical figures always generalise possibilities and potentials. Ultimately the progress correlates with the **personality and empathy** of the stakeholder, his or her readiness to improve quality, service and investment in infrastructure.



Along the **Ruhrtalradweg**, North Rhine-Westphalia, Germany, the overnight stays increased by 13 % between 2008 and 2009, while this number decreased by 2.5 % in the destination Ruhrgebiet. (Source: ADFC Radreiseanalyse 2010). According to the project management of the Ruhrtalradweg the initiative of innovative, industrious, service oriented stakeholders has considerable impact on the economic benefit.

## 2.2 Trends in cycling tourism related to the Rhine Cycle Route

In order to benefit from the potential of cycle tourism the relevant trends in tourism and society must be identified and considered in product development and distribution.

- **Quality**

Quality is justifiably often mentioned and has to be taken extremely seriously. Especially cycle tourists are very experienced and therefore able to assess performances and services realistically. Tourism along the river Rhine has a long tradition. During the 70s and 80s of the last century some parts of the river Rhine experienced mass tourism and excursion traffic in the urban areas. Especially the middle Rhine segments in Germany lately show some need for improvement concerning the quality of accommodation and restaurants. **Recommendations of friends and relatives** are one of the most important sources of information. Internet platforms (like Holidaycheck) and social networks have become an important source of information. They are used to report from experiences made and to evaluate and assess the quality of trips, routes and

accommodation, and to reveal lacks in quality. Important to remember: If single components of a trip are of minor quality the whole product (trip) is judged negatively.

- **Individuality**

Every guest wants to be treated as an individual person and the tourism industry responds to that demand. Cycle tourists in particular often expect special arrangements (see chapter 3.6).

- **Flexibility**

Cycling means being exposed to wind and rain, depending on (public) transport, dealing with fitness etc.; therefore service providers should always be able and willing to react to an unexpected change of plans. Half of the cycling tourists do not book their accommodation in advance (Trendscope 2010). This spontaneous behaviour requests great flexibility on the side of the accommodation business.



Photo: Albert Plümer

- **Shorter and more frequent tours**

Three-week-vacations become rare, the market for weekend trips grows. The Rhine Cycle Routes expects long distance cyclists who will often change their accommodation every day. Accommodations must be prepared to accept guests for one night.

- **Price sensitivity**

Depending on the category of gastronomy and accommodation, prices have to be reasonable and comprehensible. Some of the interviewed experts and travel reports in social networks report about some destinations along the Rhine Cycle Route where the price-quality ratio is not justified. However, customers want travel products and services at the best price - which is not necessarily the lowest.

- **Smart Shopping** (Luxury and asceticism)

The chosen kind of vacation does not necessarily correlate with the income. Businesspeople go on tent-camping-trips (e.g. reported by experts from the Netherlands) and students spend wellness-weekends in five star hotels. Categorising tourists becomes more difficult, especially regarding an international product like the Rhine Cycle Route, so that every single guest has the same high value and should be treated with the same courteousness.



Photo: Rainer Sielker

- **Simplicity**

Complicated booking systems, busy telephone hotlines without real people to talk to and confusing web pages distract potential cycling tourists from receiving information and ultimately from booking an offer. Simplicity lately became a trend of increasing importance and should be considered in the development of products and establishing the network of the Rhine Cycle Route.

- **Globalisation**

A great variety of cycle tourism products is available in almost every country of the world. Tour operators are able to fulfil almost every wish. Individual, adventurous cyclists report wonderful experiences while surrounding the world by bike. Competitors of the Rhine Cycle Route can be found worldwide. Therefore it is very important that the Rhine Cycle Route attracts potential target groups with well defined unique characteristics and high quality products.

### Recommendation

The Rhine Cycle Route can answer most of the above mentioned trends by

- Taking over the criteria for cycle-friendly accommodations (see Chapter 3.7.3).
- Agreeing common quality standards and offer training sessions for service providers along the route.
- Integrating co-ordinated complaint management, regular service checks and evaluations in the planning of the future marketing of route.
- Co-ordinating and harmonising the different web presentations and other marketing tools into a common and user friendly presentation.

### Product trend: Bicycles with electric support

A special trend product in bicycle tourism is the **pedelec**. Referring to the EU Directive 2002/24/EC pedelecs are *"cycles with pedal assistance which are equipped with an auxiliary electric motor having a maximum continuous rated power of 0.25 kW, of which the output is progressively reduced and finally cut off as the vehicle reaches a speed of 25 km/h, or sooner, if the cyclist stops pedalling."*



Photo: movelo (www.movelo.de)

The use of pedelecs is growing consistently which is appreciated by the retail industry and touristic destinations as well. 4 % of all cycling tourists are already using E-Bikes or pedelecs, 20 % of them are rented. 35 % of all cycling tourists can imagine using an E-Bike or Pedelec in the future. These figures show that this potential has to be taken seriously.

### Results of a survey in Geneve with 309 owners of pedelecs

- 60 % of the users are women
- Average age is 47 (the age of new users tends to be increasingly younger)
- Education is relatively high, 53 % attended university (of applied sciences)
- Major use is commuting to work (76 %) instead of using the car
- Motivation is sustainable mobility, less effort than regular cycling, comfort, health, avoiding traffic jams, affinity to the new technology and speed.
- Requirements are high-quality cycle paths, charging points, low weight of the pedelec and an efficient battery.
- Current potential in Switzerland is the sales duplication every year. In 2030 10 % of the Geneve-population will own a Pedelec.

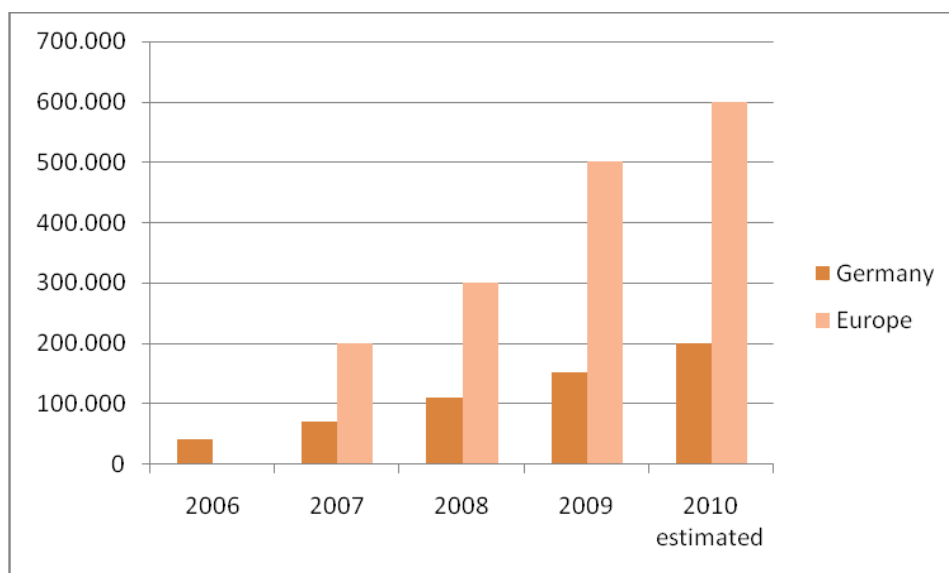
Source: Observatoire Universitaire de la Mobilité, 2009. Usagers, usages et potentiel des vélos à assistance électrique (VAE). Résultats d'une enquête menée dans le canton de Genève.



The relevance of pedelecs for cycling tourism used to be seen limited to the elderly or physically challenged cyclists or limited to mountain range destinations. Today it can be observed that pedelecs became a **lifestyle-vehicle**. Enthusiastic cyclists, who own bicycles for different occasions like racing, mountain biking, trekking etc., add a pedelec to their fleet because they are interested in the innovation and the new experience of cycling. More reserved cyclists are simply encouraged to cycle more and longer distances, also in flat landscapes, because it is so easy and fun. According to experts information the growing use of pedelecs for recreational purposes will be part of some market research projects in the near future. The German company Movelo does currently establish pedelec rental services in different cycling destinations in Germany, Austria, Italy and Spain.

In the Netherlands already 10 % of all new sold bicycles have electric support (Landelijke Fietsplatform 2009). Experts' opinions indicate a potential of 30 %. The product development departments of pedelec producers work on the improvement of the technology. For example the battery life time is extended, the batteries have a convenient format, and charging stations become less important as the aim is to recharge the battery in a normal socket.

#### Sales figures of E-Bikes in Germany and Europe



Source: ADFC-Radreiseanalyse 2010, Zweirad-Industrie-Verband Fahrradmarkt 2009

#### Product trend: Smart phones, GPS and others appliances

Smart phones and global positioning systems (GPS) become more and more popular. Smart phones are mostly used for spontaneous on-site information checks and service information about sites, restaurants, travel times, hotels etc. Although most of them have GPS programmes, smart phones are – according to experts' opinion – too fragile to be used as a permanent GPS by cycle tourists. Special GPS appliances for cycle tourists are becoming more and more popular. Yet only one quarter of the German tourism marketing associations offer GPS-Tracks, but the market is growing. The share of cycle tourists who use GPS currently ranges around 10 %, and most of the users report positive experiences with that technology (DTV 2009).

The Rhine Cycle Route should answer this trend by developing GPS tracks and a mobile version of their website(s).

### Lifestyle trend: Sustainability

Bicycle tourism enjoys the reputation of being **sustainable and eco-friendly**. In Germany 9 Mio. travellers, usually with higher education and a net-income between 1.500 and 3.000 €, are interested in suitable offers and willing to pay 10 to 20 € more per day for food, lodging and transport. They travel alone or with partner and are often between 30 and 40 years old. For the German travel market an additional annual turnover potential of 4.5 Billion € can be created (Sparkassen-Tourismusbarometer Deutschland 2010). Similar amounts for the partner countries can be assumed cautiously:



Results of the expert interviews allow the assessment that German and Swiss tourists are equally environmentally conscious, followed by Dutch travellers, while French tourists yet are supposed to think and act less sustainable than their European neighbours.

#### Recommendation

**Service providers along the Rhine Cycle Route can benefit from this potential, if they implement the required characteristics.** Sustainability and environmental awareness are no longer a question social of responsibility but also a matter of economic efficiency.

Trends should be taken very seriously in view of market developments and competition. Regular **trend scouting** is necessary in order to stay up to date. Very professional about the market of cycling tourism and current trends are **tour operators**; close co-operation is recommended.

## 2.3 Tour operators and their clients

Important co-operation partners in developing the Rhine Cycle Route are tour operators.

They:

- Are responsible for their own businesses and have a distinctive interest in being **economically successful**.
- Are therefore motivated to **respond to the market demands** and **create custom tailored products**.
- Have a **good understanding of target groups**, appropriate products, potentials etc.
- Have **practical knowledge** about cycle routes and the appropriate distribution channels.

These skills qualify them as **important partners** to develop synergies. Although 50 % of cycling tourists travel individually and do not book services in advance (Trendscope 2010), they still consult the catalogues as a source of information. Therefore tour operators can be an **important additional way of promotion and serious brand multipliers** for the Rhine Cycle Route.

The river Rhine as a classical bicycle destination is part of many tour operator programmes. Certain parts of the Rhine Cycle Route are offered repeatedly. An offer for cycling the whole route cannot be found yet.



Reasons – beside the length – are the differences in quality of infrastructure and cycle-related services along the Rhine Cycle Route.

**Clients of tour operators** are often 50 years and older, quite well educated, book individual offers and expect great flexibility and individual service. Bicycle tours require a substantial amount of explanatory support. The tour operators specialise in regions and group sizes and respond to different target groups. The majority is united by the standard of strongly reacting to the individual needs and demands of the clients: most offers can be modified in terms of the chosen route, level of difficulty, accommodation etc. Many tour operators cooperate and network with each other. They perform as distribution partners, listing the offers of colleagues in their catalogues and taking care of customers in the network.

#### **Recommendation**

For tourism organisations on the Rhine Cycle Route the co-operation with tour operators is a convenient way to offer additional services, gain additional ways of distribution and create a win-win-win-situation: The tourism organisation does not have to cope with the offers in details, the tour operator generates business, and the bicycle tourist's expectations and needs are fulfilled professionally.

## **2.4 Target groups**

To address target groups with products or offers, it is essential to get to know how people think and feel, understand their values, aims in life, ways of living and their attitudes. Information on target groups is taken from the analysis of literature, questionnaires and expert interviews.

Among the multiple ways of clustering target groups the most important target group models for the bicycle tourism industry are introduced.

To get an impression of the proportions in the partner countries, initially the population sizes are listed.

### **2.4.1 Sizes of target groups**

#### **Population of the partners countries of the Rhine Cycle Route**

Switzerland: 7.8 Mio	France: 65.4 Mio
Germany: 81.7 Mio	The Netherlands: 16.6 Mio

Altogether **171.5 Mio inhabitants** show a great potential for the Rhine Cycle Route. The importance of cycling for every day purposes is shown in the following table:

#### Overview of cycling in the partner countries of the Rhine Cycle Route

Country	Share of cycle trips	Distance per Person per year
Switzerland	6% (2000)	No data available
France	3% (1994)	73 km
Germany	10% (2002)	329 km
Netherlands	27% (2005)	913 km

Source: European Parliament 2009

The **Netherlands** excel in cycling in general; the bicycle has great importance for daily use as well as recreational purposes. 16.2 million inhabitants possess 18 million bicycles, so that every person owns more than one bicycle (an upward trend).

Recreational use of the bicycle in the Netherlands	Total (2003)	Recreational motive (daytrips > 2 h)
Number of cycle trips	4.4 Billion	427 Mio. (9 %) – 26 km per Person
Total length of cycle trips	13.9 Billion	3.7 Billion (27 %) – 230 km per Person
<b>Proposition/Approach:</b> There is not persuasion necessary to increase the use of bicycles in Holland. The Rhine Cycle Route as a long distance cycle route should encourage longer and cross-border trips.		

Source: Landelijke Fietsplatform 2010

Many sources of market research related to cycle tourism are provided by German organisations. Although every country has own characteristics, the results are interesting for all partner countries.

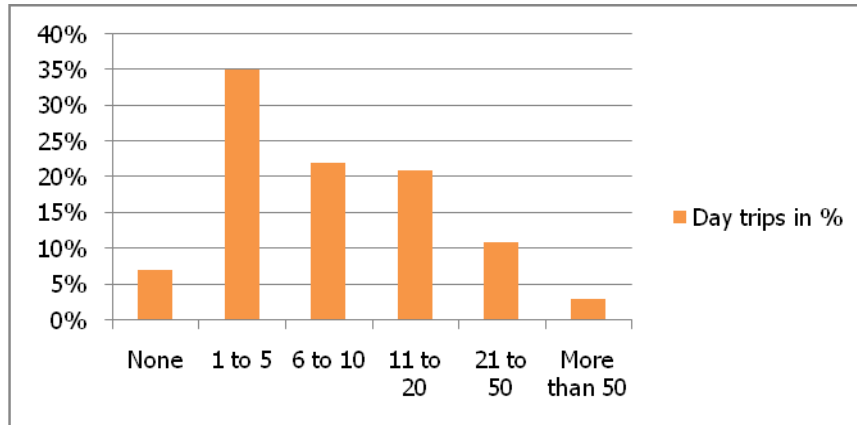
Almost everybody in Germany above the age of 14 years went on bicycle trips in the past. In France inhabitants above the age of four years have been questioned (data for Switzerland and the Netherlands were not available):

Day trip cyclists	Character	Percentage
Germany	local inhabitants of the region – no accommodation	98 %
France	Locals, families, cycle regularly, slowly, weekends and holidays, 5 to 30 km	42 %
<b>Proposition/Approach:</b> Day trip cyclists use parts of the Rhine Cycle Route on their tours. This target group should be valued and acknowledged because of the <b>economic impact</b> and the <b>multiplier function</b> .		

Source: Trendscape 2010, Atout France 2009)

On the Rhine Cycle Route the **densely populated urban areas** such as Rotterdam, Ruhr area, Rhineland, the areas around Frankfurt am Main, Mannheim, Karlsruhe, Strasbourg, and Basel benefit from bicycle day trip tourism.

**Number of cycle day trips per cycling tourist in 2009**



Source: Trendscape 2010

Relevant for the development of the Rhine Cycle Route is knowledge about **vacation cyclists**, whose characteristics remarkably differ due to the type of trip.

Type of trip in Germany	Character	Percentage
Touring cyclist	stays almost every night in a different place	27 %
Regional cyclist	stays in one place from which several tours are undertaken	23 %
Vacation cyclist	among other activities also a bicycle is used - cycling is <b>not</b> the main vacation motive	50 %
<b>Proposition/Approach:</b> The aim of the Rhine Cycle Route is to become a popular long distance cycle route so that especially the <b>touring cyclists</b> should be addressed, for whom the Rhine Cycle Route is very suitable. <b>Regional and vacation cyclists</b> are also interested and combine the Rhine Cycle Route with adjoining destinations.		

Source: Trendscape 2010

## 2.4.2 Source markets

The majority of cycling tourists on the Rhine Cycle Route are recruited from regional source markets, but also international guests play an increasingly important role. Especially German cycle tourists tend to travel abroad. On Veloland Schweiz routes Germans make up 3 % of all cyclists and 16 % of holiday cyclists who stay two nights or more (European Parliament 2009). The following table gives an overview of cycling in potential source markets in order to identify the acceptance of cycling in general.



### Overview of cycling in potential source markets of the Rhine Cycle Route

Country	Share of cycle trips	Distance per Person per year
UK	1 % (2005)	73 km
Ireland	2 % (2002)	183 km
Italy	2 % (2000)	146 km
Norway	4 % (2001)	-
Austria	5 % (2005)	146 km
Belgium	8 % (2002)	329 km
Sweden	10 % (2000)	256 km
Finland	11 % (1998)	256 km
Denmark	18 % (2001)	584 km

Source: European Parliament 2009

In Europe **Scandinavia** seems to be an interesting source market, but experts and tour operators report, that the demand is very limited yet except from **Denmark**. On the contrary there is an increasing request for cycle tourism products along the Rhine Cycle Route from **Italy and Spain** (no data available), although in general cycling does not play an important role there. Expert opinions and the above table agree on very little potential in the UK as a source market.

**Outside Europe**, the Rhine Cycle Route can attract, due to the international high profile of the river Rhine, target groups from overseas, especially from **USA, Canada, Australia** and increasingly from **Asian markets** like **Japan and, China**.

Although only 5 % of the cyclists in Germany come from abroad (DTV 2009), the following table shows the remarkable share of turnover of international cyclists.



Share of turnover in Germany	Percentage
National	76 %
International	24 %

**Proposition/Approach:** The Rhine Cycle Route has the potential to become an international destination. The aim is to increase the amount of international tourists significantly above the average of 24 %. **International marketing in the source markets** is necessary.

Source: Trendscape 2010

43 % of the US-Americans tourists who travel to Europe chose the partner countries France (18 %), Germany (15 %) and Benelux (10 %) as their destination (DZT 2010). Other interesting source markets are Italy and Spain. Nevertheless the most important source markets are the neighbouring countries of Switzerland, Germany, parts of France and the Netherlands.

### 2.4.3 Travel companions

Data about travel companions were only available for Germany and France:

Bicycle travel companions	Germany	The Netherlands
Partner (Couples)	59 %	63 %
Friends	36 %	8 %
Children	10 %	12 %
Single	10 %	18 %
Family	8 %	15 %
Association	3 %	-
Grandchildren	2 %	-

**Proposition/Approach:** Couples, small groups of friends and families in different compilations are interesting target groups for the Rhine Cycle Route, they cover the great majority of all cycling tourists. Still **single travellers** – especially in NL - are an undeveloped potential with a lack of custom tailored offers.

Source: Trendscape 2010, Landelijke Fietsplatform 2009



Information about group sizes were only available for the German market:

Group sizes on bicycle tours in Germany	Percentage
1-2	59 %
3 – 5	36 %
6 – 10	10 %
More than 10	10 %
<b>Proposition/Approach:</b> Small groups, singles and couples are interesting target groups for the Rhine Cycle Route, but bigger <b>groups</b> , although rare, always guarantee profitable business and should be taken into consideration.	

Source: Trendscape 2010



#### 2.4.4 Activity and lifestyle approach

Defining target groups and their market relevance is considered a serious difficulty in market research (ETI 2007). **Socio-demographic factors** are often used to cluster target groups, although experts and researchers agree, that they have very limited use. Especially the age does not characterise the bicycle tourist, because interests, experience, health, motives etc. differ considerably. To make this clear it is mentioned that Prince Charles and Ozzy Osbourne are socio-demographic twins but show much more differences than commonalities. Therefore market research concentrates on activities and lifestyle:

Activity/Character of German and French cyclists	Km	Accommodation	Description	Percentage
Sophisticated connoisseur	30-80	High quality hotels and bed & breakfasts.	Well educated, lifestyle- and health-oriented, preferring gourmet meals and comfortable flat paths, sometimes in groups.	37 %
Interested cyclists	30-70	Lodging houses, inns and hotels.	Interested in culture, fine art, history etc. in groups or pairs, preferring comfortable flat paths.	28 %
Experienced cyclists	50-120	Hostels, hay hotels, campgrounds and farms.	Go on cycle trips regularly in groups/pairs (every day), accept moderate to steep inclinations.	17 %
Active, athletic cyclists	Up to 200	Depending on income and training purpose.	Racing cyclists (streets with little traffic), mountain cyclists (nature trails), bicycle is sports equipment.	17 %
Racing cyclists (F)			In France often organised in associations (FFC, FFCT etc. ) cycles very fast, weekends, evenings, 2 Mio	3 %
Mountain bikers (F)			In France 6.6 Mio in total	10 %

**Proposition/Approach:** While improving service and infrastructure quality the Rhine Cycle Route should focus on the **sophisticated connaisseurs**, who are the biggest and highest spending target group with significant economic impact. **Interested cyclists** also respond to the offers of the Rhine Cycle Route. **Athletic cyclists** should be neglected due to their limited number and insufficient facilities of the Rhine Cycle Route.

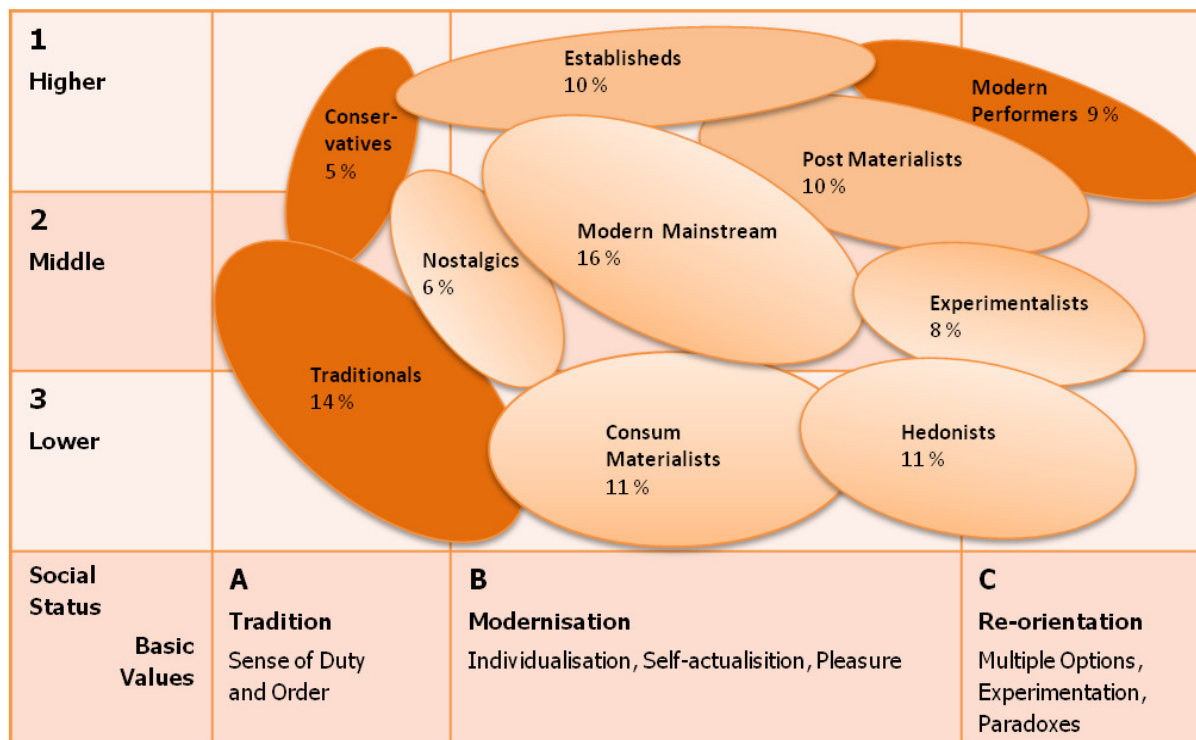
Source: Trendscape 2008, Atout France 2009

## 2.4.5 Sinus-Milieus

In order to define target groups sufficiently the description of **Sinus-Milieus** (Sinus Institut Heidelberg 2009) became highly topical in German market research. They are also available for France, Switzerland, and as meta milieus for Europe (liable to pay the cost). Sinus-milieus represent an image of the society combining lifestyle, taste and value orientation. With this method the society is divided into groups of like-minded people (Sinus Sociovision 2009, ADFC-Monitor 2009)<sup>2</sup>. Here the sinus-milieus for Germany are introduced exemplarily. Due to expert opinions they are cautiously transferable to Switzerland, France and the Netherlands.

Relevant sinus-milieus with potential for the Rhine Cycle Route are marked in dark and lighter orange:

### Sinus Mileus



Own depiction in accordance to Sinus Sociovision 2009

<sup>2</sup> Sinus-milieus have been re-defined in 2010, but in order to analyse target groups referring to the ADfC-Monitor, the 2009-version has been chosen.



The following milieus are particularly interesting:

- **High, yet partly undeveloped potential**  
for bicycle tourism and the Rhine Cycle Route (28 %):
  - Traditionals (14 %),
  - Modern Performers (9 %)
  - Conservatives (5 %)
- **Current high affinity**  
for bicycle tourism and the Rhine Cycle Route (20 %):
  - Establisheds (10 %),
  - Post Materialists (10 %)

Sinus Milieu	Character	Affinity for cycling	Percentage
<b>Society leading milieus</b>			
Establisheds	The self-confident Establishment: success ethics, feasibility mentality, and highly exclusive tastes.	Above-average use of bicycles for recreational and daily routine purpose, above average cycle tours and vacations. <b>Significant potential for the Rhine Cycle Route.</b>	10 %
Post materialists	The enlightened, post-68er milieu: liberal attitudes, post-material values, and intellectual interests.	Above-average use of bicycles for recreational and daily routine purpose, above average cycle tours and vacations. Knowledge and use of cycle friendly accommodation. Environmentally conscious. <b>Significant potential for the Rhine Cycle Route.</b>	10 %
Modern performers	The young and unconventional top performers: intensive living – both at work and play, multi-optionality, flexibility and multi-media enthusiasm.	Average use of bicycles for recreational and daily routine purpose, classical commuting cyclist. <b>Undeveloped potential for the Rhine Cycle Route.</b>	10 %
<b>Mainstream milieus</b>			
Modern mainstream	The status-oriented modern mainstream: stream: looking to establish themselves professionally and socially, seeking a sheltered and harmonious life.	Below-average use of bicycles for recreational and daily routine purpose, below average cycle tours and vacations. Prefer cars.	15 %
Consum materialists	The markedly materialistic lower class: want to keep up with the consumer standards of the broad middle classes in an attempt to compensate for social disadvantages.	Below-average use of bicycles for recreational and daily routine purpose, below average cycle tours and vacations. Dislike bicycles use.	12 %



Sinus Milieu	Character	Affinity for cycling	Percentage
<b>Traditional milieus</b>			
Conservatives	The old German educated classes: conservative critique of modern culture, humanist sense of duty, and cultivated manners ( <b>not transferable to other European countries</b> ).	Above-average use of bicycles for daily routine purpose, average use for recreational purpose. Health and environmentally conscious. Accept the highest costs for purchasing a bicycle. <b>Undeveloped potential for the Rhine Cycle Route.</b>	5 %
Traditionals	The security and order-loving wartime generation: rooted in the petty bourgeois world or traditional blue-collar culture.	Below-average use of bicycles for recreational and daily routine purpose, below average cycle tours and vacations. Walk rather than bike, interested in E-Bikes. Health conscious. <b>Undeveloped potential for the Rhine Cycle Route.</b>	14 %
Nostalgics	The resigned losers of German re-unification: clinging to Prussian virtues and old-socialist notions of justice and solidarity ( <b>not transferable to other European countries</b> ).	Above-average use of bicycles for recreational and daily routine purpose, above average cycle tours and vacations. Little knowledge of bicycle associations and cycle friendly accommodation. Bicycle is a means to an end.	5 %
<b>Hedonistic milieus</b>			
Experimentalists	The extremely individualist Bohemian world: unchecked spontaneity, living in contradiction, self-image as the lifestyle avant-garde.	Above-average use of bicycles for daily routine purpose. Main reason is low cost-level. Little knowledge of bicycle associations and cycle friendly accommodation.	8 %
Hedonists	The fun-oriented, modern lower class / lower-middle class: disregard for conventions and behavioral expectations of the achievement-oriented society.	Above-average use of bicycles for daily routine purpose, prefer public transport. Little knowledge of bicycle associations and cycle friendly accommodation.	11 %
<p><b>Proposition/Approach:</b> High income society leading milieus (30 %) already have a considerable bicycle affinity and are interesting for the Rhine Cycle Route. Especially modern performers show an undeveloped potential, similar to the traditional milieus. Here the conservatives and traditionals (19 %) should be focused on.</p> <p>Addressing the mainstream (27 %) and hedonistic (19 %) milieus is a greater challenge and should be implemented secondary.</p>			

Source: Sinus-Institut 2009, ADFC Monitor 2009

## 2.4.6 Relevant target groups for the Rhine Cycle Route

Among the variety of target groups introduced in this chapter the following target groups are relevant for the Rhine Cycle Route:

- Cyclists from different nations
- Day trip cyclists
- Touring cyclists
- Families with children
- Groups
- Sophisticated connoisseurs
- Leading and traditional sinus-milieus
- Target groups for niche markets
- Single cyclists

In Chapter 3.11 descriptions of their needs and expectations regarding the Rhine Cycle Route are explained in detail.

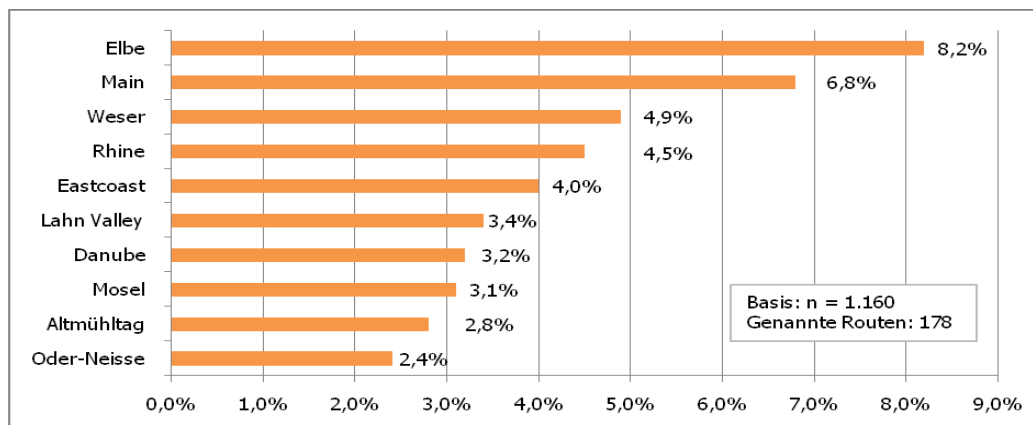
## 2.5 Position of the Rhine Cycle Route in the context of European cycle routes

The Rhine Cycle Route belongs to the group of the most important river cycle routes in Europe. River cycle routes are per se attractive for cyclists. Different target groups enjoy cycling without great physical challenge near the water with regular access to food, lodging, landmarks and points of interest. However, customer surveys show that the majority of three quarters of the cycling tourists choose a bicycle region and only one quarter chooses a long distance cycle route (Trendscope 2010).

### 2.5.1 The most popular long distance cycle routes (example Germany)

According to the a national German survey (ADFC Radreiseanalyse 2009) the Rhine Cycle Route is on position no. 4 of the most popular long distance cycle routes.

**Travelled long distance cycle routes 2009 in Germany – Top 10**



Source: ADFC Radreiseanalyse 2009

### 2.5.2 Comparison of three main European River Cycle Routes

The most important competitors of the Rhine Cycle Route are the Elbe and the Danube Cycle Routes. The following table gives an overview about the comparison of these three routes based on different studies and surveys:

	<b>Danube</b>	<b>Elbe</b>	<b>Rhine</b>
<b>Length</b> in km	2.860	1.220	1.320
<b>Countries</b>	Germany, Austria, Hungary, Croatia, Serbia, Bulgaria, Romania	Czech Republic, Germany	Switzerland, France, Germany, Netherlands
<b>Internet</b>	<a href="http://www.Danuberadweg.de">www.Danuberadweg.de</a> <a href="http://www.Danuberadweg.at">www.Danuberadweg.at</a> <a href="http://www.Danube-info.org">www.Danube-info.org</a> and various other links	<a href="http://www.elberadweg.de">www.elberadweg.de</a> <a href="http://www.elberadweg.cz">www.elberadweg.cz</a>	<a href="http://www.rhinecyclerroute.eu">www.rhinecyclerroute.eu</a> <a href="http://www.velorouterhin.eu">www.velorouterhin.eu</a> <a href="http://www.rheinradweg.eu">www.rheinradweg.eu</a> <a href="http://www.rijnfietsroute.eu">www.rijnfietsroute.eu</a>
<b>Popularity position</b> in Germany (ADFC Member-Questionnaire)	2003: No. 2 2004: No. 3 2005: No. 3 2010: No. 5	2003: No. 3 2004: No. 2 2005: No. 1 2010: No. 1	2003: No. 9 2004: No. 8 2005: No. 6 2010: Not among the Top 10.
International <b>Popularity position</b> (ADFC Member-Questionnaire)	No. 1 (20 %)	Not among the Top 10.	No. 11 (2%)
Regional <b>Popularity position</b> (ift 2009, guest survey on the Rhine Cycle Route in NRW)	No. 6 (2.7 %)	No. 8 (2 %)	No. 1 (20 %)
<b>Last cycle destination</b> (ADFC 2009, see figure above)	No. 7 (3.2 %)	No. 1 (8.2 %)	No. 4 (4.5 %)
<b>Last cycle destination</b> (Trendscape 2010)	No. 4 (7 %)	No. 1 (10 %)	No. 6 (5 %)
<b>Last cycle destination</b> (ift 2009, regional guest survey on the Rhine Cycle Route in NRW)	No. 5 (10 %)	No. 9 (4 %)	No. 3 (12 %)
<b>Next cycle destination</b> (ADFC 2010)	German part: No. 7 (2.6 %)	No. 1 (7.3 %)	No. 8 (2.4 %)
<b>Next cycle destination</b> (Trendscape 2010)	German part: No. 4 (5 %) outside Germany: No. 5 (4 %)	No. 2 (10 %)	Not among the Top 10.
<b>Selling position of tour operators</b> – frequency of offers (DTV 2008)	No. 8 (4.9 %)	No. 1 (25 %)	No. 7 (5.3 %)

The popularity of the Rhine Cycle Route increased between 2003 and 2005, but in 2010 it was not among the Top 10 anymore, as shown in the table above. In terms of awareness the Rhine Cycle Route is the second familiar river cycle route in Europe, but in terms of recommendation it ranks as a position number 12 from 16 river routes (Trendscope, by word of mouth).

Regional research in North Rhine-Westphalia (NRW) shows that cycling tourists in NRW (here the majority comes from NRW) appreciate their neighbourhood cycle route, here the Rhine Cycle Route is voted number one.

Surprisingly the Rhine Cycle Route is sold a little more often than the Danube Cycle Route by tour operators, but still far behind the Elbe Cycle Route (DTV 2008). This shows the market saturation along the Danube as mentioned by various sources, and stresses the potential of the Rhine Cycle Route, provided increasing quality, service orientation and marketing.

Definitely the river Rhine is one of the most famous rivers worldwide and in Europe, but the Rhine Cycle Route is not the most famous cycle route. Better infrastructure, better marketing and networking on a high level make the Elbe, Main and Weser cycle routes more popular and recommendable (Trendscope 2010). Customer surveys show that the Rhine Cycle Route is not often recommended.

On some parts of the Rhine Cycle Route cycling tourists are disappointed by confusing labelling, neglected paths, insufficient traffic routing, lack of quality or poor price quality ratio in gastronomy and accommodation.



Photo: Johan de Jong

**Weaknesses in the quality of single parts of the Rhine Cycle Route or the service chain are likely to damage the image of the whole product.** But, due to expert opinions the image of the Rhine Cycle Route does not correspond to the real situation regarding infrastructure.

All long cycle routes consist of many different parts from which some show serious quality deficits. In general Elbe and Danube do not have a significant higher quality and service level than the Rhine Cycle Route. However, a reason for their better market position could be that they have already **established visible umbrella brands** in the tourism market and common marketing strategies. Both routes offer comprehensive, multi-lingual websites and combined marketing tools like the "Elbe-Handbuch" or a common catalogue for the whole route.

#### Recommendation

This competitive situation should be considered as a **challenge and invitation** to stakeholders along the river Rhine to capitalise on the potential of the route, which has a lot to offer for cycling tourists.

Experts and tour operators ensure that the Rhine Cycle Route already is competitive, but shows **weaknesses in certain parts of the service chain, misses an umbrella brand** and **common marketing**. This should be taken into consideration when developing the marketing strategy.

### 3. Product analysis

In order to identify regional and local routes, products, services and marketing methods a **questionnaire** was sent out to **regional tourism organisations and DEMARRAGE-partners** to collect information on existing products in the region of the Rhine Cycle Route. 13 organisations returned the questionnaire:

- CH: Stiftung SchweizMobil
- F: Agence de développement touristique du Bas-Rhin (tourisme 67)
- F: Département Haut-Rhin (tourisme 68)
- DE: Kraichgau-Stromberg Tourismus e.V.
- DE: Romantischer Rhein Tourismus GmbH (Rhineland Palatinate),
- DE: Rhein-Erft Tourismus
- DE: KölnTourismus
- DE: City of Monheim am Rhein (district Mettmann),
- DE: Düsseldorf Marketing & Tourismus
- DE: City of Krefeld
- NL: Stichting Landelijk Fietsplatform
- NL: Regional Tourist Board Rivierenland
- NL: Vrijetijdshuis Brabant

Initially the addressees were asked to answer the questionnaire on the regional basis, but many of the organisations passed it on to local partners, so that comparative interpretation has become difficult.

The **tourist boards** were also asked to send any kind of **publications, material, leaflets, brochures etc.** which they currently use to market their cycle products along the Rhine Cycle Route. Three postal items were received.

In addition to the information collected **eleven experts** with different professional background, expertise and from different countries have been interviewed. Interviews partners were the following stakeholders:

- Dr. Dennis Hürten, Trendscape, general manager, DE-Cologne
- Lukas Stadtherr, Schweizmobil, CH-Bern
- Bertram Giebler, Allgemeiner Deutscher Fahrrad-Club, DE-Bremen
- Eric Nijland, Stichting Landelijk Fietsplatform, Director, NL-Amersfort
- Christian Weissgerber, Conseil Général du Bas-Rhin, F-Strasbourg
- Kristine Simonis, radissimo (tour operator), General Manager, DE-Karlsruhe
- Nina Jörgens, Martina Baumgärtner, 2-Land, DE-Viersen
- Adam Bodor, ECF, B-Brussels
- Daniel Schneider, Espace Randonnee, F-Mulhausen
- Ruedi Jaisli, Swisstrails, CH-Oberweningen

The information collected through the questionnaires plus the evaluation of the printed material showed that all inquired aspects differ considerably depending on countries and regions. This paper refers to the **results of the questionnaire, analysis of the marketing material provided, own internet research, secondary material** and **statements of stake holders**.



### 3.1 Networking opportunities and potential synergies

The length of the river Rhine, the different countries involved, the number of stakeholders, the dynamic market of cycle tourism and the interdisciplinary requirements result in a great **challenge of networking and co-ordination**.

#### 3.1.1 Partners of the INTERREG IV B Project "DEMARRAGE"

The DEMARRAGE project itself does already combine 18 partners from five countries with different professional background and expertise.

Country	Organisation	City
Belgium/Europe	European Cyclist's Federation	Brussels
Switzerland	SchweizMobil	Bern
France	Conseil Général du Bas-Rhin (CG 67)	Strasbourg
	Agence de développement touristique du Bas-Rhin (ADT 67)	Strasbourg
	Conseil Général du Haut-Rhin (CG 68)	Colmar
	Association Départementale du Tourisme Haut-Rhin (ADT 68)	Colmar
Germany	<b>Euregio Rhein-Waal (Lead Partner)</b>	<b>Kleve</b>
	Wirtschaftsministerium Baden-Württemberg	Stuttgart
	Baden-Württemberg Tourismus Marketing	Stuttgart
	Ministerium für Wirtschaft, Verkehr und Landentwicklung Hessen	Wiesbaden
	Hessen Agentur	Wiesbaden
	Ministerium für Wirtschaft, Verkehr, Landwirtschaft und Weinbau Rheinland Pfalz	Mainz
	Romantischer Rhein Tourismus	St. Goarshausen
	Ministerium für Wirtschaft, Mittelstand und Energie NRW	Düsseldorf
	Wirtschaftsförderungsgesellschaft Kreis Viersen	Viersen
Netherlands	<b>Stichting Landelijk Fietsplatform (Leading partner for the present analysis)</b>	<b>Amersfoort</b>
	Zuid-Hollands Bureau voor Toerisme	Delft
	Provincie Zuid Holland	Den Haag
	Provincie Gelderland	Arnhem

#### 3.1.2 National differences

The expert interviews held and other research have shown that the national and even regional and local differences within the countries are plentiful. They apply to

- Status of cycle tourism,
- Organisation and way of dealing with the Rhine Cycle Route,
- Path-infrastructure and sign posting,
- Marketing and distribution,
- Cycle friendly services,
- Public transport.

Due to expert's opinions the following national aspects are relevant:

- **Switzerland** shows great competence in cycling tourism generally and the Rhine Cycle Route specifically. A great ability of networking is supposed by experts and in the literature and has already been proven by "Veloland Schweiz". An organisation that defines high quality standards and integrates tourism, sports, transport and local economy.

*"Schweizmobil successfully unites the marketing regions."*

- **Germany** has a remarkable history in bicycle tourism and is an important market. On the other hand the country has too many actors and players who show a lack of co-ordination, responsibility and productive activities. Germany needs a clearer positioning.

*"Germany is the biggest market in Europe, but too many cooks spoil the broth."*

- In **France** bicycle tourism is quite new, so that service providers are yet more unexperienced than the other countries, but have a significant potential in Alsace. Cycle routes parallel to the Rhine in the back country are often preferred because of more beautiful landscape and better infrastructure, but the Rhine Cycle Route itself on the French side is usually preferred by tour operators and individual cyclists.

*"France is a developing country in cycle tourism with potential; slowly awakening."*

- In **the Netherlands** the bicycle is the most important vehicle for every day and recreational use. Bicycle tourism also receives wide acceptance. Still the country is very ambitious in developing new products, and the national tour operators and organisations are very open for cooperative ventures with partners.

*"Everybody knows that cycling in the Netherlands is standard, but only few tourists do it. This will change."*

It is assumed by the experts that Switzerland and the Netherlands as the smaller countries have more abilities to implement concrete measures in general.

The **big challenge** will be to overcome national differences, harmonise the quality of the route and establish and maintain a working network over the four countries.

### 3.1.3 Potential network partners for the DEMARRAGE project

In order to co-ordinate and harmonise the plentiful activities, to allow the sufficient exchange of information, to implement a common marketing strategy and finally to develop the transnational economic potential **it is necessary to initiate progressive co-operation.**

Important partners in the partner countries are

- Public authorities
- Tourism organisations
- Tour operators
- Accommodation and gastronomy businesses
- Customers (evaluation, complaint management)
- Bicycle associations:
  - Pro Velo Schweiz
  - VCS / ATE
  - AF3V Association Francaise des Véloroutes et Voies Vertes
  - ADC Associations Departement Cyclables
  - FUB, Fédération Francaise des Usagers de la Bicyclette
  - CNPC, Conseil National des Professions du Cycle (Cycle and parts industry, wholesaler, retailer, organisers of annual event "Tous à vélo")
  - FFC Fédération française de cyclisme
  - FFCT Fédération Francaise de Cyclotourisme
  - FUBICY Fédération des usagers de la bicyclette (promote urban use of bicycles)
  - Allgemeiner Deutscher Fahrrad-Club (ADFC)
  - Fietserbond
  - Stichting Landelijk Fietsplatform
  - ECF (European Cyclists Federation)

The mentioned potential partners should have a certain interest in participating in the current development of cycle tourism along the river Rhine and the project should provide platforms and links for their interaction.

*"Confidence, trust and a formal agreement between the countries is the key to success and the goal of the DEMARRAGE-work."*

### 3.2 Special assets and themes of the Rhine Cycle Route

**The most important unique selling proposition (USP)** of the Rhine Cycle Route is the river Rhine itself. There is no explanation necessary: Almost every person has an association or even knowledge about the river Rhine and its stories.

The Rhine Cycle Route as a major European river cycle route is diverse and meets many interests. The themes promoted on the Rhine Cycle Route depend on the USPs of the different sections and are very diverse.

*"Cultural landscapes are strung like a pearl necklace."*

In terms of publicity the Rhine Cycle Route is very well **qualified for international marketing**.

### 3.2.1 Thematic USPs

Unique selling propositions and themes regarding the whole Rhine Cycle Route are the following:

- The legendary river Rhine has many stories to tell. Tourism offers can refer to a great variety of historical anecdotes and events. The Rhine Cycle Route meets the interest in nostalgia, myths, escape to the past and historic tourism.
- The Rhine Cycle Route passes beautiful landscapes with castles and manor houses, interesting geological formations, as well as regenerated urban areas.
- Regarding to quantity, a lot of service facilities, gastronomy and accommodation are always available nearby. Regarding to quality in some parts of the route improvement is necessary.



### 3.2.2 National USPs

Special national assets of the Rhine Cycle Route (according to expert interviews and questionnaires)	
Switzerland	<ul style="list-style-type: none"> <li>• Rhine spring in the mountains to the navigable part in Basel</li> <li>• Great landscape variety in a limited space</li> <li>• Diversified routing close to the river or through villages and countrysides</li> </ul>
France	<ul style="list-style-type: none"> <li>• Famous French savoir-vivre with legendary meals and beverages</li> </ul>
Germany	<ul style="list-style-type: none"> <li>• Romantic Rhine, Loreley</li> <li>• Cologne Cathedral</li> <li>• Industrial heritage sights</li> <li>• Diversified cultural landscape, urban parks</li> </ul>
Netherlands	<ul style="list-style-type: none"> <li>• Rhine delta (aspiration is the open sea)</li> <li>• Port of Rotterdam</li> </ul>
<b>International USPs:</b> The river Rhine itself – Lake Constance - cycling downhill – connection with public transport – many stories to tell – world heritage sights - interconnection of four countries – very famous - border triangle	

*"The conjunction of four countries that are all famous as bicycle destinations is unique."*

Promoting highlights is easy, but there are some challenges for marketing and distribution. Large scale industry seems to be disturbing recreational purposes. It is recommended to make a virtue out of a necessity and e.g. promote industrial excursions.

The river Rhine historically caused the successful development of prosperous European regions and can be introduced as an **engine of economic success** to the tourism market.

Regarding **image and perception** the Rhine Cycle Route is *"far behind its possibilities"*, like experts say. The international name recognition is enormous, but romantic or magic associations and brand loyalty are reserved to older generations. The Rhine Cycle Route does not address young adventurous cyclists and often fails to attract younger target groups.

A **common concept** is missing. Tourism organizations in the different sections sometimes do not promote the Rhine Cycle Route at all, there is not enough information for the cycling tourist. Danube and Elbe have a better reputation as a long distance cycling destination, they are perceived as a whole and a complete product.

*"It would be nice to arrive at the North Sea in the Netherlands with a piece of glacier from Switzerland."*

#### Recommendation

Stakeholders report **great interest and positive response from potential guest** after advertising campaigns and trade fair presences. The Rhine Cycle Route has the chance to define European standards according to infrastructure and communication. **There is a general consensus that the Rhine Cycle Route should be promoted in its entire length.**

### 3.3 Cycle routes

The framework of the cycle route infrastructure along the river Rhine is almost complete. Of course exceptions are found in areas where the topography does not allow path routing. According to the responses to the questionnaire the following routes are listed:

Country	Example cycle routes
Switzerland	<u>National</u> : Veloland Schweiz" No 2 (Rhein-Route) <u>International/long distance</u> : EuroVelo 6 (Atlantic – Black Sea: Nantes-Budapest via Belfort – Mulhouse – Basel)
France	<u>Theme/regional</u> : 2 banks, 3 bridges: a 300km long French-German network with 20 thematic tours (history, gastronomy, sport...) – free info map, complete signposting and website <a href="http://www.2rives3ponts.eu">www.2rives3ponts.eu</a> / <a href="http://www.2ufer3bruecken.eu">www.2ufer3bruecken.eu</a> <u>Local</u> : Boofzheim/Benfeld – Piste des Forts (Fort Cycle Route); French-German cycle tracks Breisach/Neuf Brisach <u>National</u> : Paris – Strasbourg <u>International/long distance</u> : Eurovélo 5 (Via Romea Francigena: London - Rome and Brindisi 3.900 km); Eurovélo 6 (Atlantic – Black Sea: Nantes-Budapest via Belfort – Mulhouse – Basel 4.448 km) ; Lautertal Cycle Route – Haguenau/Baden-Baden - Offenburg/ Molsheim – Villé/Elzach
Germany	<u>Theme/regional</u> : Three-River-Tour; Emperor Route <u>Local</u> : City of Cologne <u>National</u> : sections of D2, 3, 6, 7, 8, not labelled
Netherlands	<u>Regional</u> : 30.000 km <u>Long distance</u> : LF-Routes (e.g. Rijndeltaroute)
<b>Eurovélo 15: Andermatt (CH) – Rotterdam (NL) 1.320 km</b>	

The quality of the path cover, infrastructure, labelling, service etc. differs considerably. According to several experts and experienced cyclists the following example **sections need improvement**:

Example section	Critique
Parts of Baden Württemberg, especially the areas around Freiburg and Karlsruhe.	Confusing signage, neglected paths. Poor price quality ratio on meals and accommodation.
Koblenz – Bonn	Neglected paths, poor traffic routing resulting in conflicts with pedestrians.
Bingen – Bacharach	Neglected paths.
Middle Rhine and Loreley	Outdated gastronomy and accommodation.
Worms	Neglected paths.
France	Good infrastructure but poor price quality ratio on meals and accommodation.

There have been no complaints about the Swiss and Dutch sections. The information listed above might be interesting for the development and implementation of the work package “Transnational organisation and capitalisation framework” of the DEMARRAGE project. However it is recommended and already foreseen in the DEMARRAGE project to **evaluate the Rhine Cycle Route entirely** by the national bicycle associations in order to receive representative results and a valid work basis for the future development of the route.



Photo: Johan de Jong

### 3.4 Publications

A great variety of publications is available on the Rhine Cycle Route, but quantity and contents differ considerably depending on their origin.



## Samples of publications on the Rhine Cycle Route

Title		Character	Price
Bikeline Radtourenbuch, Rhein-Radweg Teil 1: Von Adermatt nach Basel. 7. edition. 2010 Esterbauer	Bikeline Itinerary book, Rhine Cycle Route Part 1. From Adermatt to Basel	Description of 380 km itineraries (Schaffhausen - High Rhine - Basel) Arrangement suggestions for cycle routes	Paperback, EUR 12,90
Bikeline Radtourenbuch, Rhein-Radweg Teil 2: Von Basel nach Mainz. 9. edition. 2009 Esterbauer	Bikeline Itinerary book, Rhine Cycle Route Part 2. From Basel to Mainz	Description of 400 km itineraries (Swiss Basel – Rhine rift – Vosges – Black ) Arrangement suggestions for cycle routes	Paperback, EUR 12,90
Bikeline Radtourenbuch, Rhein-Radweg Teil 3. Von Mainz nach Rotterdam. Mit Erlebnisweg Rheinschiene. 10. edition. 2009 Esterbauer	Bikeline Itinerary book, Rhine Cycle Route Part 3. From Mainz to Rotterdam. Including adventure route Rheinschiene	Description of 500 km itineraries ( Ruhr district – Lower Rhine – Netherlands) Arrangement suggestions for cycle routes	Paperback, EUR 12,90
Bruckmanns Radführer Rhein-Radweg von Mainz zur Nordseemündung. 1. edition. 2009 Bruckmann	Bruckmann´s Itinerary guide from Mainz to North Sea estuary	Description of 15 day tours with maps 1: 75.000	Paperback, EUR 14,95
Radwanderkarte Rhein-Radweg 2, Bodensee-Basel. 2006 Publicpress	Cycle touring map Rhine Cycle Route 2, Lake Constance-Basel	Map of the Rhine Cycle Route: Places of excursions, contemplation- and free time-suggestions, weather-proof, washable, GPS-accurate, 1:50000	Folded Map, EUR 6,95
Radwanderkarte Leporello Rhein-Radweg 3, Basel – Speyer. 2010 Publicpress	Cycle touring map Leporello Rhine Cycle Route 3, Basel-Speyer	Map of the Rhine Cycle Route Places of excursions, contemplation- and free time-suggestions, weather-proof, washable, GPS-accurate	Leporello, EUR 8,95
Radwanderkarte Rhein-Radweg 4, Speyer – Köln. 2010 Publicpress	Cycle touring map Rhine Cycle Route 4, Speyer – Cologne	Map of the Rhine Cycle Route: Places of excursions, contemplation- and free time-suggestions, weather-proof, washable, GPS-accurate, 1:50000	Folded Map, EUR 8,95
Radwanderkarte Rhein-Radweg 5 Köln-Rotterdam - Leporello-Falzung. 2010 Publicpress	Cycle touring map Rhine Cycle Route 5, Cologne-Rotterdam – Leporello fold	Map of the Rhine Cycle Route: Places of excursions, contemplation- and free time-suggestions, weather-proof, washable, GPS-accurate, 1:50000	Leporello, EUR 6,95
Rheinradweg 1 : 50 000: 2009 BVA Bielefelder Verlag	Rhine Cycle Route	Compact-Spiralo Cycle touring map. From Duisburg to Arnhem.	Leporello, EUR 7,95
Radreiseführer Rhein-Radweg: Der schönste Abschnitt des Radweges in 15 Sectionen von Mainz bis zur Nordseemündung. 2010 Bruckmann	Cycle touring map Rhine Cycle Route: The most beautiful Part of the route in 15 sections from Mainz to North Sea estuary	Fragmentation of one part of the Rhine Cycle Route in 15 sections / Route-suggestions	Paperback, EUR 19,95
Rheinradweg – Rijnfietsroute. 2006 BVA Bielefelder Verlag	Rhine Cycle Route	Description of the Rhine Cycle Route / Proposals of different kinds of spending free time (culture, wellness, sports etc.)	Spiral binding, EUR 7,95

Title		Character	Price
Bikeline Radtourenbuch, Rhein-Radweg. 2005 Esterbauer	Bikeline Cycle Tour-Book , Rhine Cycle Route	Different maps which are adapted to the needs of the recipients/ information on sights / addresses	Spiral binding, EUR 12,90
Rhein-Radweg von Basel nach Mainz. 2011 Bruckmann	Rhine Cycle Route from Basel to Mainz	Information on the Rhine Cycle Route-section between Mainz and Basel	Paperback, EUR 14,95
Köln-Koblenz. Radwanderkarte 1 : 50.000: Mit Rad und Bahn an Rhein und Ahr. 2005 BVA Bielefelder Verlag	Cologne-Koblenz. Cycle touring map 1:50000: By bicycle and train along Rhine and Ahr	Description of the Cycle Route between Cologne and Koblenz / Special information on possibilities of public transport	Spiral binding, EUR 9,95
Cycling The Rhine Route: Bicycle Touring Along the Historic Rhine River. 2002 Van der Plas/Cycle Publishing	Tour guide for bicycle touring along the Rhine Cycle Route.	Route descriptions with route maps and information about the places visited, including accommodations and excursions	Paperback, \$ 14,58
La Suisse à vélo 2: Route du Rhin, Guide officiel	Switzerland by bike 2: Rhine Cycle Route	Description of the Switzerland-Part of the Rhine Cycle Route / Proposals of different kinds of spending free time (culture, wellness, sports etc.)	Paperback, EUR 17,80
Rivierenlandronde (Fietsen door de Maas en Rijndelta), Stichting Landelijke Fietsplatform 2008	Topografische Kaarten, Overnachtingsadressen, Bezienswaardigheden	Maps showing main attractions along the route, descriptions of points of interest on the reverse side of map. Booklet provides general information about nature, metropolitans, and culture. Accommodation directory, useful addresses and information on route planner.	Slipcase with 3 maps and booklet

There are some summary publications published by tourism organisations such as:

### **Radurlaub am Rhein (von Emmerich bis zum Drachenfels)**

- Small map showing the cycle Route
- Main attractions along the Route
- Bike rental stations
- Contact details for tourist boards
- General information about nature, metropolitans, culture and food specialities
- Published by Niederrhein Tourismus GmbH

### **La vélo Route Rhin (L'Alsace à vélo)**

- Brochure (7 pages) with a map and indication of hights
- Texts in three languages (French, German, English) describing the route
- Table indicating service information (bicycle rent, TOs, railway, leisure facilities etc.
- Useful addresses
- Accommodation, bike rental stations, bike repair services, main attractions

### **Rijndeltaroute (onderdeel Rivierenlandronde)**

- Leaflet (4 pages) with information on the cycle route
- General map showing the whole international Rhine Cycle Route and the Dutch part
- Contact information to Fietsplatform
- Information on the print product "Rivierenlandronde" (see table above)

## **Swisstrails macht die Schweiz mobil (Swisstrails mobilises Switzerland)**

- Main catalogue with description of the Rhine Route No. 2 on two pages
- Simple general map
- Description of character and route segments
- Bookable offers
- Selected hotel recommendations

A common layout, corporate design (CD) or formats are not recognisable.

### **Recommendation**

For the future marketing of the Rhine Cycle Route all these nationally summarising publications should be multilingual and published using the same format, structure and a CD to **establish the Rhine Cycle Route as a recognisable brand** in the European tourism market. This is an important part of the planned DEMARRAGE activities.

## **3.5 Marketing and Internet**

### **3.5.1 Web site**

The common webpage of the Rhine Cycle Route ([www.rheinradweg.eu](http://www.rheinradweg.eu)) is available in the following versions:

<b>French</b> (Véloroute Rhin) <a href="http://www.velorouterhin.eu">www.velorouterhin.eu</a>	<b>English</b> (Rhine Cycle Route) <a href="http://www.rhinecycleroute.eu">www.rhinecycleroute.eu</a>
<b>German</b> (Rheinradweg) <a href="http://www.rheinradweg.eu">www.rheinradweg.eu</a>	<b>Dutch</b> (Rijnfietsroute) <a href="http://www.rijnfietsroute.eu">www.rijnfietsroute.eu</a>

The page allows the potential customer a first orientation and overview. The large quantity of listed contacts for further information, especially in Germany and the Netherlands, can confuse the cycling tourist interested in the Rhine Cycle Route and keep him from having a closer look or even travelling or booking an offer. The websites mentioned with the contact are general and do not lead to specific information about the Rhine Cycle Route. In addition, not all contents are up to date; obviously some parts of the page have not been updated regularly.

Google search for "Rhine Cycle Route" does not bring qualified results. This can be a problem of search items but can also be due to the different naming of the route in different languages.

Due to the growing importance of the internet in all tourism businesses, there is an urgent need to provide high quality online information. It is part of the DEMARRAGE activities to establish a new customer friendly web presentation. Yet most partners have built own web presentations for their part of the Rhine Cycle Route.

### 3.5.2 Marketing activities of the different regions

**Marketing activities** are very diverse in the different regions. Currently the regions do not have a common strategy. Some regions do not consider the Rhine Cycle Route at all in their marketing; others offer web pages, references in their newsletters, trade fair participations, events, maps and brochures or press releases. Most regions that refer to the Rhine Cycle Route already cooperate professionally with other partners, organisations and tour operators.

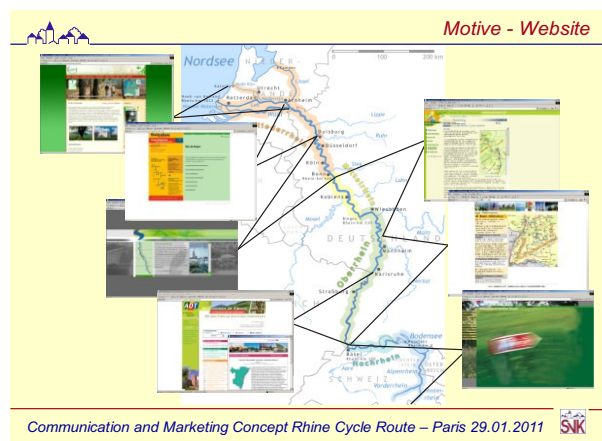
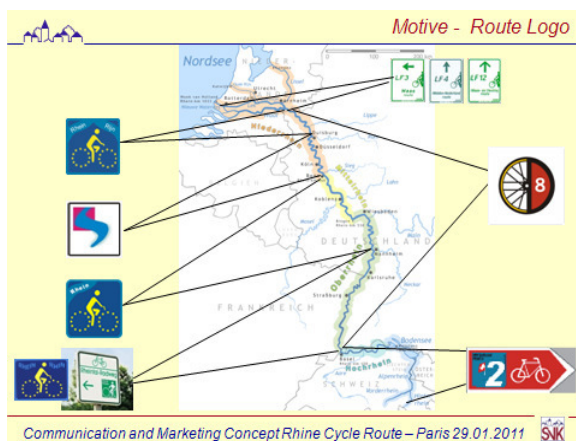
#### Marketing activities in the partner countries and regions

Region	Responsible organisation	Representing	Print products	Web	Languages Website
The Netherlands	Stichting Landelijke Fietsplatform	Rhine delta	Slipcase with 3 maps and booklet	<a href="http://www.landelijkefietsroute.nl">www.landelijkefietsroute.nl</a> <a href="http://www.rijnfietspad.nl">www.rijnfietspad.nl</a>	Dutch, partly German and English
North Rhine-Westphalia	2-Land	Drachenfels to Emmerich Route "Erlebnissweg Rheinschiene"	Small map Marketing tool kit for hotels (roll-up, posters)	<a href="http://www.rheinradweg.net">www.rheinradweg.net</a> comprehensive and detailed information about the route, hosts, sights etc.	German
Rhineland-Palatinate	Romantischer Rhein, Rheinland Pfalz Info	Remagen - Bingen	Not supplied	<a href="http://www.radwanderland.de">www.radwanderland.de</a> <a href="http://www.romantischer-rhein.de">www.romantischer-rhein.de</a> <a href="http://www.rhein-radtouren.de">www.rhein-radtouren.de</a> <a href="http://www.rheinhessen.de/rhein_radweg.html">www.rheinhessen.de/rhein_radweg.html</a>	German, Dutch German German
Hesse	HA Hessen Agentur	Rheingau, Wiesbaden, Odenwald	Not supplied	<a href="http://www.hessen-tourismus.de">www.hessen-tourismus.de</a> (long distance cycle routes)	German
Baden-Wuerttemberg	Tourismus-Marketing GmbH Baden-Württemberg	Rheintalweg (only partly identical with Rhine Cycle Route)	Not supplied	<a href="http://www.tourismus-bw.de">www.tourismus-bw.de</a> (Rheintal-Weg)	German
France	Association Départementale du Tourisme du Haut-Rhin, Agence de Développement Touristique du Bas-Rhin	La véloroute Rhin	Brochure „La véloroute Rhin“ „Canaux et véloroutes - Le Rhin »	<a href="http://www.tourisme67.com">www.tourisme67.com</a> <a href="http://www.tourisme68.com">www.tourisme68.com</a>	French German English
Switzerland	Stiftung Veloland Schweiz, SchweizMobil, Swisstrails	Rhein-Route (Andermatt-Basel)	Description in Swiss-trails travel catalogue	<a href="http://www.veloland.ch">www.veloland.ch</a> different regional pages with introduction/description of the route and link to veloland.ch	German French English Italian
Europe	ECF conseil général du Centre	Basel – Lake Constance	General EuroVelo Map	<a href="http://www.eurovelo6.org">www.eurovelo6.org</a>	German Englisch French

### 3.5.3 Challenge of the common marketing strategy

It takes no wonder that the Rhine Cycle Route is not recognised as a brand yet. All the marketing material mentioned does not have a common design, structure, format or contents and does not even use a common logo. The activities of the different regions are not co-ordinated or linked to each other. Different logos, branding and signage are used (see chart below) for the different sections of the route. Cyclist can hardly recognise the common basis.

Although the Rhine Cycle Route is a transnational offer, a considerable **lack of multilingual material** and presentations was discovered. On many of the websites of the partner regions the search for "Rhine Cycle Route" does not lead to results.



Source: Ralf Kaulen, SVK 2008

#### Recommendation

The challenge will be to co-ordinate all existing and new tourism and marketing activities in a way that a common brand identity is promoted by all organisations and can be recognised by the cyclists. As an international project a consequent multi-lingual marketing and promotion is essential. The examples of Elbe and Danube show that an umbrella brand and co-ordinated marketing raise the general awareness and increase visitor numbers.

### 3.6 Products and bookable offers

The basics of the product Rhine Cycle Route are bicycle paths, service infrastructure, and signposting. Online route planners provided by bicycle associations and public authorities and GPS-applications support individual cyclists and tour operators in planning the itinerary.

Only few partners who answered the questionnaire offer guided cycle day trips themselves. Most of the guided tours (several thousand per year) are offered by the national bicycle associations.

**Bookable packages** (combining the route with accommodation and others services) along the Rhine Cycle Route are offered, usually in co-operation with tour operators and often combining the river Rhine with surrounding destinations.

The tour operators often provide **different varieties and route options** for different target groups (such as touring or regional cyclists) to meet the customers' individual preferences (desired sportiness, preferred accommodation and general interests).

The offers of the tour operators cover the whole river Rhine with an emphasis on the German middle Rhine sections, but recently also the partner countries gain importance.

In the Netherlands the river Rhine ends in the delta with multiple branches, so that linear offers are not reasonable and round trips are preferred. Only a few offers (mainly in the south) are transnational. For the Rhine Cycle Route it is recommendable to develop additional **cross-border products**.

Combinations with other **activities like canoeing, hiking, wine tasting and wellness** can complement cycle tourism offers and attract new target groups.

Some tour operators successfully combine **bicycle tours and river cruises**. This was also strongly recommended by the consulted experts because it combines two current trends in tourism.

*"There are many possibilities for combined tours with ship and bicycle."*

#### Example bicycle package deals

- \*Swiss Alp-Rhine Cycle Route Chur – Konstanz, 7-day-tour, 210 km (from 530 € up).
- Bregenz – Basel, 8-day tour, 260 km (from 550 € up).
- \*Basel – Mainz, 8- or 10-day tour, 400 km, regular or sportive (from 530 to 670 €) **Bestseller**.
- \*Basel – Speyer, 8-day-tour, 320 km in two varieties (from 530 € up).
- \*Basel – Freiburg – Mainz, 8- or 10-day-tour, 330 or 420 km in two varieties (from 670 € up).
- \*Rhine and Black Forest, 8-day-tour, 240 km (from 590 € up).
- \*Konstanz – Freiburg, 8-day-tour, 265 km (from 550 € up).
- \*Freiburg – Heidelberg through Rhine Valley in Alsace and Baden, 280 – 340 km (from 590 € up).
- Freiburg – Mainz, 8-day-tour, 320 km in two varieties (from 530 € up).
- Round trip along Rhine and Neckar, 8- or 9-day-trip (from 590 € up, combination with river cruise from 650 € up) **Bestseller**.
- Rudesheim – Cologne, 7-day-tour, 190 km (from 520 € up).
- Speyer – Cologne, 8-day-tour, 310 km (from 590 € up).
- Mainz – Cologne, 7-day-tour, 220 km (from 450 € up) **Bestseller**.
- Mainz – Duisburg, 8-day-tour, 310 km (from 590 up).
- Classical tour along Rhine, Ahr and Erft, 230 - 250 km (from 530 € up).
- Rad Region Rheinland (north, south), 5-day tours for regional cyclists who stay in one place from which several tours are undertaken in the Rhineland. Accommodation in Bonn or Cologne is recommended (from 300 € up, gourmet tour from 560 € up).
- \*Hanseatic cities – lower Rhine and Ijssel, 8-day-tour, 195 – 325 km (from 700 € up).
- Rhine delta in the Netherlands, 7-day tour, 255 km (from 530 € up).

\* Transnational tour.

The following substantial travel services are usually included: Accommodation (3\*), breakfast, luggage transfer, maps and guidebooks, 24 h-service-hotline.

Optional: Rental bikes or e-bikes, transfers, extension nights, upgrades, guided tours, admission fees.



Customer surveys and reports from tour operators show that **bookable offers lose their function as package deals**. They are usually published in catalogues and on websites to make a concrete suggestion and are used to give the customer an idea of a possible bicycle vacation. In reality the customer asks for extensive modifications or a complete different product which is especially designed for his preferences.

*"The customer designs his own product."*

#### Recommendation

The Rhine Cycle Route should co-operate with tour operators as they meet the challenge of being individual bicycle trip consultants and professional organisers if not managers of individual and unique products.

In addition to local and regional product development the Rhine Cycle Route should focus on cross-border packages and combinations with other activities such as canoeing, hiking, regional specialities, health and river cruises.

### 3.7 Accommodation and gastronomy along the Rhine

#### 3.7.1 Accommodation

Hotels and restaurants are plenty along the Rhine Cycle Route. The number and variety of accommodation close to the route is – based on results of the questionnaire – considerable and seems to be sufficient:

#### Types of accommodation provided along the Rhine Cycle Route

Country	Campground	Youth hostel	Guesthouse, bed & breakfast	Hotel up to 3 stars	Hotel 4-5 stars	Vacation home
Switzerland	2 km*	2 km*	2 km*	2 km*	2 km*	2 km
France	2-5 km	2-5 km	2-5 km	2-5 km	2 km	-
Germany	2-5 km	2-5 km*	2-5 km*	2-5 km*	2 km	2-5 km
Netherlands	2-5 km*	2-5 km	2-5 km *	2-5 km*	2-5 km*	2-5 km*

\* cycle friendly (Source: questionnaire sent to all DEMARRAGE-partners)

Surveys show that cycling tourists in all European countries often prefer hotels and guest houses:

### Types of accommodation used by bicycle tourists

Accommodation type	Average use	Average range	Anomaly/Remark
Hotel	40 %	30-60 %	German holiday cyclists: 16 % (only 3-4 star hotels)
Inn, Guesthouse, B&B, Farmstay	45 %	30-60 %	Veloland Schweiz: 15 % France (Route 6): 9 %
Camping	15 %	10-20 %	The Netherlands (LF-Routes): 43 %
Youth hostel	7 %	5-13 %	Danube/lower Austria: 1 %
Private rooms, relatives	11 %	2-27 %	Large variation
Other (incl. vacation homes)	15 %	5-15 %	German holiday cyclists: 31 %

Source: European Parliament 2009

The Rhine Cycle Route seems to be able to cover this demand sufficiently by the quantity of existing accommodation offers, but improvement of quality and a clearer focus on cycling tourists should be encouraged by the Rhine Cycle Route.

### 3.7.2 Gastronomy

The Rhine Cycle Route in all countries and regions has access to a variety of resting places, such as

- Restaurant/Café – some certified as cycle friendly and some barrier-free.
- Kiosk/Snack bar
- Sheltered rest area
- Picnic area

Most of them are in general suitable for tourists, although many businesses do not cater to the special demands of cycling tourists. Especially the tourism industry along the German middle Rhine, which was benefiting for years from the international popularity of the Rhine, has focused on traditional tourism, often bus and group tourism. In various cases this resulted in investment delays and hindered the businesses from focusing on new (and younger) target groups.

As mentioned before, quality is one of the most important trends in tourism. **Nowadays all target groups demand a certain quality and standard of the accommodation regardless their level of comfort or star ratings.** Review and rating web sites (like Tripadvisor, Holidaycheck etc.) publicly reveal lacks of quality and name the "black sheeps".

In order to maintain their competitiveness many service providers (will) have to work on their food and accommodation quality and contemporary service performance.

### 3.7.3 Bicycle friendly certificates

**Bicycle related certifications** of accommodation are not very well known among the cycling tourists (Trendscope 2010): Only 9 % know the German marketing co-operation "Bett & Bike", although this brand connects more than 5.000 hosts and is respected as quite successful. Bett & Bike is considered important or very important by 59 % of the cycling tourists who are familiar with it, but for 40 % it does not influence their decision for an accommodation. The challenge for providers of bicycle related accommodation certifications is to raise awareness for their brands and achieve name recognition.



Accommodation providers can be encouraged to successfully focus on bicycle tourists as this leads to an overall quality improvement. Customer surveys show the following priority ranking of bicycle friendly criteria among the tourists (Trendscope 2010):

#### Bicycle friendly criteria considered important by tourists

Accommodation	Gastronomy businesses and places to have a break
<ol style="list-style-type: none"><li>1. Lockable room for bicycles</li><li>2. Drying room for equipment</li><li>3. Accommodation for one night</li><li>4. Access to information material and maps</li><li>5. Information about the next repair shop</li><li>6. Healthy and high carbohydrate food</li><li>7. Repair area with repair set supply</li><li>8. Lunch box take away</li><li>9. Luggage transfer</li><li>10. Inhouse rental bikes</li></ol>	<ol style="list-style-type: none"><li>1. Bike park in range of sight</li><li>2. Access to information material and maps</li><li>3. Healthy and high carbohydrate food</li><li>4. Repair set supply</li></ol>

Source: Trendscope 2010, ETI 2007

Bicycle friendly criteria, released by the national bicycle associations, are very helpful in explaining how to focus on cycling tourists and stimulate business in general. Bicycle friendly criteria in France, which are currently implemented, and Switzerland, where the system has already been established, are very similar. In the Netherlands the Bed & Bike system is also currently developed. In Germany seven minimum requirements and ten further recommendations are listed. Special criteria address catering establishments and camp sites.

The bicycle associations of the partner countries do all require at least the following criteria for bicycle friendly accommodation:

### Minimum bicycle friendly criteria already implemented on the Rhine Cycle Route by the partner countries

1. Acceptance of one-night stays of cyclists.
2. Lockable (by key or coin) place for equipment and clothes.
3. Place to dry equipment and clothes.
4. Special breakfast with energetic value (cereals, eggs, cheese, fruit etc.)
5. Bath or shower for the cyclist in the accommodation
6. The host provides maps with cycle, mountain bike and hiking routes, and timetables for public transport.
7. Small tool kit with floor pump for small repairs and maintenance is provided.
8. Host can give advice on and help access bicycle shops/repair stations and bicycle rental stations (opening times, prices). On demand, the host pre-reserves bicycles for the account of the customer.
9. The hotelier provides picnic baskets, when booked the night before.
10. The hotelier knows the presented cycle routes and can advise the guests on details.

These criteria could be the basis for a "Rhine Cycle Route" quality label and maybe combined with common marketing activities (such as Rhine Cycle Route merchandising articles, branded "Rhine cycle meal" etc.) which the quality businesses do have to offer additionally.

**On the Rhine Cycle Route many service providers are already aware of the importance of cycle friendly services.** And the number of service providers joining the co-operations, getting the certificate and implementing the criteria to the benefit of the customer and in order to strengthen their competitive position is constantly increasing. Especially small businesses are very interested to participate and enhance their performance. This is a process that the Rhine Cycle Route should support and lobby for.

*"Hosts and service providers like to adorn themselves with cycle friendliness."*

### Recommendation

For the accommodation businesses and service providers along the Rhine Cycle Route **common standards for the quality of welcome and infrastructure for cyclists should be agreed** or at least recommended. In the long term, the marketing of cycle friendly businesses should be integrated in the overall marketing of the route by using a common label or the Rhine Cycle Route Logo with an addition. A good example here for is the German hiking trail "Rothaarsteig" who has developed its own label ("Qualitätsbetrieb Rothaarsteig") for participating hosts ([www.rothaarsteig.de](http://www.rothaarsteig.de)).

However, an own quality label needs a lot of work, man power and a certain budget to ensure the selection but also long-term maintenance of the quality criteria (regular checks, seminars for hosts etc.). It would therefore be advisable to realize **this quality label in co-operation with existing national cycle friendly systems** who might take over checks along with their own evaluations.

## 3.8 Conjunction with public transportation

Conjunction with public transportation could be ideal along most parts of the river Rhine because of the comprehensive connection. Most regions have access within three kilometres to long distance and regional transport as well as to commuter railway, ferries and other means of public transport. However, many service providers (e.g. in Alsace, the Netherlands and parts of North

Rhine-Westphalia) report **disinterest and difficulties of transport providers**. Public transportation is therefore defined as a weakness in the SWOT analysis.

*"Public transport, of course, is a dead loss."*

Usually the infrastructure is judged to be sufficient but there are complaints about the **lack of bicycle services** in public transportation systems. Bicycle transport is not encouraged, it is uncomfortable, appropriate compartments are often missing and space is limited. In Germany bicycle transport in the long-distance trains (ICE) is still not possible, due to expert statements lately even IC-trains refuse to move bicycles.



Photo: Johan de Jong

This does already have an **impact on the marketing of the Rhine Cycle Route**: Although the linear Rhine Cycle Route is designed for touring cyclists who change their accommodation almost every day, in reality two thirds of the cycling tourists stay in one place and undertake day trips (ift 2009). This is related to the limited possibilities to take the bicycle on trains.

The lack of interest in customers with bicycles that is demonstrated by the majority of rail transport systems in all partner countries leads to the search for alternatives. The river Rhine as a traditional coach trip destination can benefit from the new co-operation between the German bicycle association ADFC and the RDA Workshop Touristik Service who represent the coach- and group tourism industry in Europe. This new project tries to compensate the deficiencies of public transport and bicycle tourism by offering coach-bicycle trailers and special services for groups of cycle tourists. It is currently discussed how regular coach services can be made available for individual cycle tourists, which kind of communication platforms and marketing methods are necessary in order to bring together supply and demand and how to create and define the network of coach companies and bicycle associations.

Along the whole river Rhine cycle friendly public bus service is rare (one exception is the post bus in Switzerland), but many regions are also connected to river traffic such as ship landing stages, ferries and even aerial passenger lines or cable cars which are very entertaining and attractive for (cycling) tourists which is also mentioned as a strength in the SWOT analysis.

#### **Recommendation**

The responsible persons of the Rhine Cycle Routes should continuously remind politicians and local/regional stakeholders of the importance of cycle friendly conjunction with public transportation. National bicycle associations and the umbrella organisation European Cyclists' Federation (ECF) have already contributed essential lobby work and networking in the last years and continue to do so with growing intensity. Also public transport customer organisations have been active and working on this topic.

### 3.9 Seasonality

The analysis of all four countries shows that the main season for cycling the Rhine Cycle Route is from **April to September**. During the summer months (July and August) and during school holidays there is an additional increase of cyclists. This is not surprising considering the fact that cycling is an outdoor activity and corresponds with the experiences made at other cycling routes. For the product development it is interesting to investigate the identified target groups and seek potential for the extension of the season in order to increase bookings in accommodation businesses and restaurants.

The **wind direction** is not an issue along the Rhine Cycle Route. West winds are predominant, but diversify strongly in the Rhine Valley due to topography, urban climate and other microclimate situations. According to expert opinions even in the flat landscape of the Netherlands the wind direction does not affect the decision in which direction to cycle, because usually the way from the source to the estuary is preferred. "Arriving at the seaside" is mentioned as one of the unique selling propositions of the Rhine Cycle Route.

### 3.10 Services

**Bicycle rental** and repair are possible in most of the regions, even pedelec (electric bikes) rental and charging points are common (e.g. in Switzerland, North Rhine-Westphalia and the Netherlands). This specific and growing infrastructure answers the trend of E-bike-use (see chapter 2.2).

**Baggage transport services** become more and more a matter of course. The services are usually offered by hotels and other accommodation providers or are organised by tour operators. Surprisingly this service is by the majority of respondents not considered to be very important, according to market research (Trendscope 2010), but especially in the context of upscale offers and for target groups of a higher age this service is required.



Photo: Johan de Jong

#### Recommendation

The Rhine Cycle Route should make sure that the cyclists get a good overview about the service offers provided along the route by suitable measures, e.g. integrating this information in maps, websites etc..



### 3.11 Target groups of the Rhine Cycle Route and their different needs and expectations

In chapter 2.4 different target groups due to different clustering methods were introduced.

*"All target groups should be approached."*

The identified target groups have different characteristics, referring to needs and expectations, nationality and other factors that reveal a certain importance.

**All segments and the stakeholders of the Rhine Cycle Route approach similar target groups.** The following target groups should be particularly approached within the common product development of the Rhine Cycle Route:

#### 3.11.1 Cyclists from different nations

In terms of nationality the service providers should collect valid information about the different source markets and clearly adapt to their characteristics.

Even among the partner nations of the Rhine Cycle Route differences due to nationality are obvious: Experts opinion state that for example cycling tourists from **Germany, France and Switzerland** are clearly more demanding than cycling tourists from the Netherlands.

Independent of their income **Dutch cycling tourists** tend to perceive a bicycle trip or vacation as an adventure and prefer rather simple accommodation and gastronomy **services**.

Interestingly in France the majority of the cycling guests come from abroad, because here bicycle tourism has just been discovered a few years ago by the local population.

The majority of the cycling tourists along the Rhine Cycle Route comes from the **neighbouring countries** whose characteristics are acquainted, but also **Denmark, Spain and Italy** are supposed to have a considerable relevance as source markets. **Scandinavia** shows a significant acceptance of cycling in general, but does not have an impact on the Rhine Cycle Route yet. This source market shows potential for further development.

**The great international potential suggests more thorough involvement with the demands of other European and international target groups** who can easily reach the Rhine Cycle Route through some major airports (e.g. Basel, Frankfurt am Main, Köln, Düsseldorf) and central train stations. Tour operators report that customers from the USA, Canada and Australia and from Japan and China cycle along the river Rhine.

#### 3.11.2 Day trip cyclists

Even without spending on accommodation day trip cyclists have an enormous economic impact because of their significant number (see chapter 2.1).

For example in North Rhine-Westphalia day trip cyclists cause an annual turnover of 1.3 Billion € per year.

*"Day trip cyclists troop to the beergardens along the Rhine en masse."*

Day trip cyclists also are opinion makers and multipliers and support the cost-free marketing tool "recommendation of friends and relatives". Their interests, activities and demographic backgrounds are very diverse, so the basic principle is to fulfil their demands in terms of excellent safety, service, **sign posting** and infrastructure quality along the Rhine Cycle Route. In France the "voie verte" (greenways) are highly appreciated (Atout France 2009). Day trip cyclists are attracted by adequate opening hours of service providers, a wide range of dishes in gastronomy, parking areas for bicycles and charging stations for E-bikes.

### 3.11.3 Touring cyclists

Well maintained, car-free paths with moderate inclination are the preference. Touring cyclists cycle on average 50 to 80 km on their 5 to 8 day trip. They are often "active best agers" or "empty nesters" who cycle without their adult children. But the Rhine Cycle Route also attracts an above-average number of younger couples which is appreciated by the consulted experts.



Photo: Johan de Jong

Touring cyclists look for a different bicycle friendly accommodation every day. More sophisticated or challenging touring cyclists appreciate luggage transport and other services. Guide books and intermodal transport are important. Most parts of the Rhine Cycle Route meet these expectations.

*"Important target groups of the Rhine Cycle Route are touring cyclists, no matter where they come from."*

### 3.11.4 Families with children



Photo: Johan de Jong

Classic families, patchwork families, grandparents with grandchildren etc. prefer flat, safe and reliably signposted routes that should provide places to rest, playgrounds and entertaining locations at regular intervals. Families cycle between 15 and 40 kilometres a day and often stay in hostels, hay hotels, on farms or campgrounds. Tour operators report an increasing demand for river cycle products by families with children (over 13 years) for the Rhine Cycle Route. Families with smaller children and babies could be attracted by the intersection free, flat surface and wideness suitable for bike-trailers.

### **3.11.5 Groups**

Cycling groups usually need a lot of supervision in organising and implementing a bicycle trip. Although many groups are often not high-spending, they are interesting customers for package deals. One product can be sold to many customers at the same time. The river Rhine has been a traditional destination for groups so that service providers and tour operators are already familiar with that and are able to quickly emphasise the features of bicycle tourism.

### **3.11.6 Sophisticated connoisseurs**

Managers of the German Ruhrtalradweg stated that „after a long day the majority of bicycle tourists – this has been proven by now – prefer high quality accommodation with excellent cuisine in an appropriate ambience“. More than one third of all cycling tourists are approachable with advanced service and quality within the framework of the whole service chain also on the Rhine Cycle Route.



Photo: Johan de Jong

### **3.11.7 Leading sinus-milieus**

Establisheds, post materialists and modern performers on bicycle tours expect their own character features to be implemented in service, infrastructure and products: achievement orientation, motivation, commitment to excellence, individuality. The leading sinus-milieus enjoy wellness offers and cultural programs in their activity holidays and are new media-affine.

### **3.11.8 Traditional sinus-milieus**

Conservatives and traditionals have a strong sense of duty. Their most important expectations are safeness and tidiness. They often belong to the older, health conscious generation and represent the frugal cycle tourist. Traditional sinus-milieus are likely to become frequent guests, which is an “endangered species”, if their expectations are fulfilled on the Rhine Cycle Route.

### **3.11.9 Commuting cyclists**

Commuting cyclists ride their bike to work or shopping activities etc.. This target group is not relevant for the tourism market, but has an impact on the acceptance of using a bicycle also for recreational purpose. The Netherlands show great affinity to bicycle tourism in both ways. In

France it is pointed out that commuting cyclists appreciate good connection to public transport, bike parking facilities and security in urban areas (Atout France 2009).

### 3.11.10 Single cyclists

Quite a few cycling tourists are single travellers. Many of them are between 30 and 40 years old, well educated with a high level of disposable income. Single travellers often have a "second-class" status regarding accommodation and gastronomy. The future service quality of the Rhine Cycle Route should make a warranty as to the result that single travellers enjoy equal treatment.



Photo: Ulrich Syberg

### 3.11.11 Other target groups

*"We should invite 'firstlings', because the river is well known and they have not experienced the route yet."*

Small but for the individual provider possibly interesting are target groups for **market niches**.

- Owners of **individually manufactured bikes** like tandems, recumbent bikes, bikes for physically challenged people etc.
- **Pet-owners** who bring their dogs and other pets in the bicycle basket.

The characteristics of the Rhine Cycle Route (flat and usually well maintained) are very inviting for individually designed vehicles or for the special needs of physically challenged people when the path criteria (minimum path width 2 m, no stairs, trafficability for tandems and bicycle trailers) are fulfilled.



Photo: Ulrich Syberg

These niche target groups represent an **interesting market** and could be addressed with suitable marketing instruments and services tailored to their needs.

Market research and most expert opinions agree that the target group of **athletic or adventurous cyclists** is usually not approached by the Rhine Cycle Route and should not be in the future.

*"Racing bicyclists should be discouraged, there is a conflict of use on the paths."*

Some of the experts interviewed state that this could be different in case a corridor of 20 to 30 kilometres including the low mountain ranges along the river Rhine is included in the Rhine Cycle Route marketing.

*"Some parts of the corridor are adequate for mountain bikers."*

*"The whole corridor, 20 to 30 km on both sides of the river, should be brought to the market."*

### Recommendation

Not all partner regions have to address all mentioned and recommended target groups. Eventually the **decision for certain target groups is taken individually by the service providers and tourism organisations** on regional level along the Rhine Cycle Route, who match their offers with the need of the desired guests and their overall tourism products.

## 4. Strategies for product-market-combinations

### 4.1 SWOT-Analysis

A SWOT-analysis identifies strengths, weaknesses, opportunities and threats. The SWOT-sheet gives an overview and reveals perspectives for future actions.

Strengths	Weaknesses
<p><b>Market: Bicycle Tourism</b></p> <ul style="list-style-type: none"> <li>• Growing market of cycle tourism</li> <li>• Popularity of river routes</li> <li>• Popularity of cross-border offers</li> </ul> <p><b>Product: Rhine Cycle Route</b></p> <ul style="list-style-type: none"> <li>• USPs: famous river, Cologne Cathedral, Loreley, Romantic river Rhine, Rhine spring and Delta...</li> <li>• Many safe and well maintained paths</li> <li>• Cycling on both sides of the river</li> <li>• Diversity of landscape</li> <li>• Good accessibility</li> <li>• Easy orientation along the river</li> <li>• Shared responsibility of stakeholders</li> <li>• Culinary specialities (wine, beer, Rhinish kitchen, Alsace etc.)</li> </ul> <p><b>Switzerland</b></p> <ul style="list-style-type: none"> <li>• Good example of organisational structures in cycle tourism, highly professional</li> <li>• Very good reputation in terms of competence among partners</li> <li>• International Travel &amp; Tourism competitive index 2009 the country ranked in position 1</li> </ul> <p><b>France</b></p> <ul style="list-style-type: none"> <li>• Savour-vivre</li> <li>• Remarkable potential for development of bicycle tourism</li> <li>• National initiative to develop cycle tourism</li> <li>• International Travel &amp; Tourism competitive index 2009: position 4</li> </ul> <p><b>Germany</b></p> <ul style="list-style-type: none"> <li>• Great variety of quality products</li> <li>• International Travel &amp; Tourism competitive index 2009: position 3</li> </ul> <p><b>Netherlands</b></p> <ul style="list-style-type: none"> <li>• International Travel &amp; Tourism competitive index 2009: position 13 (from 133)</li> <li>• Cycling is an every day routine – great acceptance</li> </ul>	<p><b>Market: Bicycle Tourism</b></p> <ul style="list-style-type: none"> <li>• Information overload, too many offers and products</li> <li>• Public transport is increasingly cycle unfriendly</li> </ul> <p><b>Product: Rhine Cycle Route</b></p> <ul style="list-style-type: none"> <li>• Weak image</li> <li>• Quality of infrastructure and service differs and needs improvement in certain segments</li> <li>• Lack of infrastructure- and sign-posting maintenance</li> <li>• No overall marketing concept, no common brand recognisable yet</li> <li>• Large number of stakeholders, diverse responsibilities</li> <li>• Insufficient presswork and public relations</li> <li>• Common website is not updated</li> <li>• Large amount of themes complicate target group approach</li> <li>• Lack of multilingual marketing tools to approach international target groups</li> </ul> <p><b>Switzerland</b></p> <ul style="list-style-type: none"> <li>• Took a late start in cycle tourism</li> </ul> <p><b>France</b></p> <ul style="list-style-type: none"> <li>• Rhine is a canal and misses beautiful scenery</li> <li>• Cycle tourism has little acceptance yet</li> </ul> <p><b>Germany</b></p> <ul style="list-style-type: none"> <li>• Too many stakeholders with incomprehensible responsibilities</li> </ul> <p><b>Netherlands</b></p> <ul style="list-style-type: none"> <li>• Lack of cycle friendliness in public transport</li> <li>• Incoming cycle tourism has been neglected</li> </ul>



Opportunities	Threats
<p><b>Market: Bicycle Tourism</b></p> <ul style="list-style-type: none"> <li>• Curiosity of cyclists</li> <li>• Combination with other offers (river cruises, hiking etc.)</li> <li>• Combination of different countries and their USPs, overcoming the borders</li> <li>• Economic impact secures and enhances employment</li> </ul> <p><b>Product: Rhine Cycle Route</b></p> <ul style="list-style-type: none"> <li>• General improvement of service and infrastructure</li> <li>• Create a visible brand by common marketing and corporate design</li> <li>• Address trends (pedelec etc.)</li> <li>• Awareness of the partners resulting in focussing on cycle tourism</li> <li>• Cycle friendly awareness of service providers</li> <li>• Various (transnational) co-operations</li> <li>• Cross-border offers</li> <li>• Neighbouring countries serve as strong source markets and co-operation partners</li> <li>• Collecting and exchanging knowledge among partners</li> <li>• Public subsidies for investment</li> </ul>	<p><b>Market: Bicycle Tourism</b></p> <ul style="list-style-type: none"> <li>• Brand and destination competition with other river cycle routes (Elbe, Danube etc.)</li> <li>• Increasing market saturation</li> <li>• Reduced travel-related spending due to economic crisis</li> </ul> <p><b>Product: Rhine Cycle Route</b></p> <ul style="list-style-type: none"> <li>• Lack of interest of some stakeholders and service providers</li> <li>• National/regional initiatives instead of pooling activities transnationally</li> <li>• Lack of brand image and recognisability</li> <li>• Dependence on weather and seasons, (problem for accommodation businesses to achieve year-round-bookings)</li> <li>• Neighbouring countries see themselves as competitors</li> <li>• Absence of required financial means for marketing and distribution</li> <li>• Sustainability of the product and co-operation after the expiry of the DEMARRAGE project</li> </ul>

The lists of strengths and opportunities are longer than the lists of weaknesses and threats. In general the potential of the Rhine Cycle Route can be considered to be sufficient to become a competitive route in the European long-distance cycle tourism market.

Strengths and opportunities have the potential to become focal points of the upcoming tourism development of the Rhine Cycle Route.

## 4.2 Factors for success and failure

Factors of success and failure are an important part of the market analysis report as they give concrete ideas and advices for the future work of the project group.

Based on the evaluation of the current marketing and products of the Rhine Cycle Route, the experts interviews and the overall market analysis the following five major fields of activities have been identified and can be recommended to improve quality and raise awareness for the overall product:

- Communication
- Product development
- Quality
- Distribution
- Organisation

### 4.2.1 Communication

It is essential that all partners, stakeholders, service-providers and potential guests become aware of the Rhine Cycle Route, so one main aim needs to be **raising general awareness** for the Rhine Cycle Route. This will mainly be done through communication.

#### Branding

**Standardised branding** and a **corporate design** are essential for the recognisability of the Rhine Cycle Route as a brand in tourism. A brand is always a promise for a certain product and quality, therefore common **standards** should be agreed upon (what does the brand stand for?). The use of the common **logo** needs to be defined (who is entitled to use it and what are the conditions for the use?). In the long run standardised **labelling** should be provided along the whole Rhine Cycle Route and the elements of corporate design should be consequently implemented in all publications and websites of all participating partners. Standardised labelling needs also to be implemented in the **sign posting** of the Rhine Cycle Route.

#### Web page

The internet (besides maps) is in the meantime the most important source of information in cycle tourism. In 57 % of vacation cyclists and 48 % of day trip cyclists use the internet for planning their tour (Trendscope 2010). The Rhine Cycle Route therefore needs an up-to-date, multilingual web presentation linking in a transparent way to the existing national web sites. The challenge in the DEMARRAGE project will be to define which content is on the central web site of the route and which will be provided decentrally on the (partly already existing) national web sites in a way that customers are able to discover (and book) the Rhine Cycle Route as a transnational product. Sustainable structures and agreements for the **maintenance and co-ordinated updating** of the central web site but also of the national web presentations are essential for success. As well as additional agreements on translations (ideally done by native-speaker webmasters within the partnership) and similar layouts and the implementation of the corporate design on the national web pages.

#### Public relations



Especially when budgets are limited or products have a weak or lacking image, **continuous and professional press work and public relations** are essential. Besides the regular publication of press releases, an up-to-date website, a high-quality picture gallery, competent press contact for journalists and press trips are helpful

instruments to implement an efficient communication strategy.

For the Rhine Cycle Route it is necessary to develop a **well structured and co-ordinated public relation system that reaches every level** (local, regional, national, transnational) and

is applicable for local service providers and national tourism organisation as well. Experiences in other transnational projects show that the media do not work internationally, therefore the tasks should be allocated nationally or even regionally using the existing press contacts.

Still, a common picture database, basic press texts, a clear allocation of tasks and responsibilities among the partners and the definition of interfaces are necessary to ensure a common image.

### **Communication with partners**

The level of commitment varies significantly between different partners. In order to activate the commitment and to cultivate a positive and cooperative working atmosphere the spreading of valid information and a high level of transparency are important. Knowing about products and potentials motivates partners to participate in the project. Sales and distribution partners appreciate invitations to get an introduction of the products and experience it **(fam-trips)**, before they start distribution activities. Service providers should be invited to **regular meetings** to support the network character and give a platform for teambuilding. Given the length of the Rhine Cycle Route the communication with the partners should be broken down to a regional level. In addition to these "working group" meetings, an **annual Rhine Cycle Route conference** where all stakeholders can meet, give and see presentations and discuss the future development of the route should be an important part of the internal communication.

### **Integration of marketing activities**

A joint marketing strategy and the co-ordination of the marketing of all partners active in the project are essential for the economic success of the Rhine Cycle Route. Marketing activities need to be co-ordinated and linked with each other. For the implementation of marketing activities the Rhine Cycle Route should activate already existing marketing structures and enhance the co-operation between organisations mentioned in chapter 3.1. In a first step a **"round table"** is helpful to define and allocate tasks and responsibilities according to competence, man power and budgets. Common quality standards should be developed and communicated in order to define the corporate image and external appearance. **Also the financial contribution to the common marketing of all partners needs to be defined to ensure continued activities after expiry of the European funding.**

### **Theme oriented marketing**

Building theme oriented marketing cluster enables regions to promote thematically related products and share the costs and efforts for marketing. Possible themes for a thematic marketing of the Rhine Cycle Route are

- Romantic Rhine river
- World heritage sites
- Urban landscapes
- Natural landscapes
- Industrial heritage
- Culinary specialities
- etc.

In addition, the invention of **annual or seasonal themes** could be helpful to further promote the route in total. Events at different parts of the route, promotions and common press work help to raise awareness for the Rhine Cycle Route and create a sense of co-operation. Annual or seasonal themes create also an additional **motive for travelling and reason for concrete bookings** by regular and new guests.

### **Common event**

In the longer term a common event for all stakeholders along the River Rhine (such as "Rhein in Flammen", "Tous à vélo" etc.) could be developed. A day or week where all parts of the route offer certain events under one topic would be a good **"news angle"** for promotion and press works and can be established as an annually recurring date. In addition, planning, organisation and realisation of such an event would **increase the co-operation** of the stakeholders.

### **Multi-lingual marketing**

When researching the existing marketing tools and products it became obvious that there is no common agreement on how to deal with the different languages (German, English, French, Dutch) of the participating countries and their populations. **For this transnational cross-border route the multi-lingual marketing is essential.**

When defining the common marketing tools, the Rhine Cycle Route stakeholders should agree that at least the basic media (common website, brochure, leaflets, maps etc. covering the whole route or larger parts of it) are published in the different languages. A benefit of the transnational co-operation is that translations can be done by native speakers in the partner organisations and so in the long term costs can be reduced.

## **4.2.2 Quality**

Cycling tourists become frequent guests quickly. They are very well cross-linked so that recommendation of friends and relatives becomes the most important informal marketing tool. **58 % of the cycling tourists take the decision for their destination because of the recommendation of friends and relatives** (Trendscape 2010).

In addition, social networks and review platforms (such as "Holidaycheck") become more and more important when people decide about their travel destination.

Because of the cycle tourists extensive travel experience they are able to identify attractive high quality routes and products. Unfortunately low quality and disappointment is communicated about ten times more than positive travel experience. And, the judgement of the quality of the whole trip is influenced by one weak element in the service chain.

Focusing on quality in every aspect and detail is therefore the **basis of all efforts** in the tourism industry, combined with an effective complaint management.

### **Quality of infrastructure**

The evaluation of the quality of the infrastructure is not subject of the present market analysis report. Within the DEMARRAGE project a special work package is dealing with this issue. Except

the mentioned exceptions (chapter 3.3) the route infrastructure is reported to be **mostly satisfactory**. However, if reliable results about the route infrastructure, signage, routing etc. are required, an **expert's evaluation by travelling the route** is necessary and already planned in the DEMARRAGE project.

### Quality of accommodation

As mentioned before the quality of the accommodations along the Rhine is in many cases not up-to-date. The Rhine Cycle Route should encourage their hosts to **improve the overall quality of their accommodations** by making them aware of the importance of quality (seminars, conferences, best-practice-examples, publication of survey results etc.). In addition the hosts should check their special services and infrastructure for cyclists. Therefore the bicycle friendly criteria, released by the bicycle associations, are very helpful in explaining how to **focus on cycling tourists** and stimulate business in general.

### Service Quality

Besides the hard factors of quality such as infrastructure, signage, accommodation etc., the soft factors become more and more important. An important aspect is the quality of service, which is addressed by the initiative ServiceQ to improve service quality throughout all service sectors. The **ServiceQ-Certificate** was developed in Switzerland and has been adapted to the German tourism market, guaranteeing joint standards and assuring the tourist a certain quality level. ServiceQ does not only address restaurants and accommodation providers but all sectors connected to the tourism industry (such as transport, museums and sights, retailers etc.).

In seminars, held by experienced quality lecturers, the staff (not only managers but all employees) is trained to deliver customer-friendly and consistent level of service quality by developing service chains. Daily routines and operations are reviewed and optimised and controlling mechanisms recommended. ServiceQ has three different levels. In some destinations tourism organisations have started to exclude businesses without the certificate from their catalogues. The Rhine Cycle Route should encourage their service providers and hosts to certify with Service-Q.

### Quality routes

The German bicycle association (ADFC) audits and evicts quality cycle routes in Germany. So far 17 cycle routes have been displayed and are emphasised in press work and publications. Yet only 10 % of cycling tourists in Germany have heard about the ADFC quality cycle routes. For 64 % of them the certification is important or very important.

Nevertheless quality programmes are **important methods supporting sustainable service development**, as the awareness among tourists will grow and the screening helps providers to seriously improve their service.

#### Good-practice-example: Rheinsteig

The "Rheinsteig", a high-quality hiking trail from Bonn (North Rhine-Westphalia) to Wiesbaden (Hesse), led to investments and an increase of professionalism focussing the hiking target group. This very successful project can be a role model for the Rhine Cycle Route where the questioning of stakeholders and experts reveals a lack of certified bicycle-friendly hotels and restaurants.

### 4.2.3 Distribution

Distribution means the point of sale: Where can guests and customers buy the product "Rhine Cycle Route" and book the offers? The main distribution channels for the Rhine Cycle Route are:

- (Specialised) Tour operators
- Tourism organisations
- Internet platforms (bookable offers)
- Accommodation providers

Three quarters of bicycle tourists who book their tour in advance, contact the accommodation directly, 12 % choose the internet. 40 % book up to four weeks in advance, 39 % up to ten weeks in advance (Trendscope 2010). The distribution system needs to provide short-term availability and flexibility.

To address tour operators **B2B trade fairs** (such as ITB, GTM, RDA, etc.) and **specialised workshops** (often organised by the national tourist organisations) are the right place. In addition **targeted contacts to cycle tour operators** should be initiated and the products of the Rhine Cycle Route should be integrated in the **sales guides** of the regional and national tourism organisations.

For the distribution of the Rhine Cycle Route the participating parties need valid and formatted information and

- ideas for their target groups
- information sources and image databases
- high quality consulting
- support in developing bookable offers
- planning reliability
- qualified contact persons.

### Cross-border distribution

The challenge will be to organise the distribution in a customer-friendly way. For a complex and diverse product like the Rhine Cycle Route it is unrealistic to have one central point of distribution and information. This central contact point would hardly be able to have detailed knowledge about each destination and region along the Rhine. On the other hand, it is not market-orientated to ask the cyclist to contact numerous tourist boards for booking a cross-border tour. It is therefore recommended to **establish a system of national contact and distribution points** (if needed also on "Département" or "Länder" level) which organises bookings and provides information for their part of the route. Existing organisations with the appropriate man power (for example call-center, tourist office), knowledge and technical equipment (booking platform, catalogue distribution etc.) could take over this function. In North Rhine-Westphalia the cross-border platform "2-Land" is already co-ordinating the activities for the stakeholders in the land.

Bookings should not be limited by national borders; therefore an internal system of transnational co-operation, interfaces and cross-border bookings should be developed.



### Online-bookable offers

The internet becomes more and more important as booking platform for any kind of tourism offers. Therefore online-bookable offers are a must-have for the Rhine Cycle Route. Also apps for smartphones providing service information are desirable.

*„Distribution is moving online.“*

### 4.2.4 Product development

The product development must be done in co-operation with service providers and accommodation businesses in the regions to achieve **long-term sustainability of the Rhine Cycle Route**. Those businesses are the ones who need to identify with the Rhine Cycle Route and fill the product with life. **How do they identify with the route? By earning money with it!** Examples from the Elbe Route have shown that if the accommodation businesses and restaurants generate measurable additional income by the cycle route, they support the cycle route and transport the common brand.

*"Hotels and cycle friendly accommodation are willing to cooperate."*

Small businesses and service providers often have good ideas and develop interesting products but there is no **platform to communicate** them. The Rhine Cycle Route should via tourist boards provide the platform for communication, marketing and distribution.

*"The manual of the Elbe cycle route and the Rheinsteig-marketing are very good examples."*

*"Communication services should be provided on a high level in each country."*

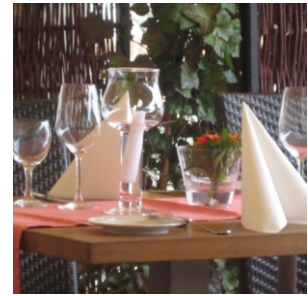
Besides the labelling of hosts and restaurants with the Rhine Cycle Route logo and ideally their certification as Rhine Cycle Route quality business, common marketing activities should be developed:

- Service kit for hotels and restaurants (posters, roll-up displays, napkins, preprinted menus etc.) to support their marketing activities and make the brand visible
- Special "Rhine Cycle Route" dish, which is offered in all participating restaurants
- Merchandising products applicatory for cyclists (e. g. water bottles, bicycle seat covers, rain covers, etc.)

### Ideas for product development

For the Rhine Cycle Route many experts as well as latest trends in the tourism industry suggest to focus on the following keywords:

- Combination with river cruises
- Combination with other activities such as hiking, canoeing, swimming etc.
- City tourism offers
- Nature tourism offers
- Industry tourism offers (Bayer, Ciba Geigy, Wesseling etc.) as well as Industrial Heritage (Ruhr area, Alsace)
- Gastronomy offers (regional specialties, healthy food)
- Pedelects (electric bikes)
- GPS services, smart phone apps
- Infrastructural improvement
- Combination with other products (from the North Sea to the Mediterranean via Rhine and Rhone)



**Geo positioning systems** are a matter of course in automobile mobility and have increasing relevance in bicycle tourism. The use of GPS equipment, digital maps, apps for smartphones, online solutions and in - the tourism market - geocaching is constantly growing.

The market for **river cruises** is currently expanding and cycling tourists can be addressed with very attractive bookable offers that combine both activities. Other **sports related combinations** like cycling and hiking, canoeing or swimming are getting more and more popular, some of them aiming at the desired younger target groups.

A new trend are **Pedelects** (electric bikes, see chapter 2.2.) which become more and more popular among the cyclists. This target group requires technical support and recharge facilities.

For all target groups the **culinary factor** still becomes more and more important. Especially cyclists appreciate good, healthy, seasonal, regional food. According to different sources overnight guests spend about 17 €, day tourists about 10 € per day and person in restaurants and snack bars.

What seems to be a weakness can be changed into a product: **Industry** along the river Rhine is plenty. While cycling around those areas is often not very attractive, cycling inside these normally not accessible areas is interesting and new. Guided tours in industrial units and manufacturing companies can help to set a balance point to the nature spoiled locations of the Rhine Cycle Route. In addition, industrial heritage sites are an interesting and unique cultural asset and highly appreciated by the cyclists (Example Ruhrtal-Radweg).

But also products in terms of **infrastructure** help to make the Rhine Cycle Route successful:

### Rest areas for cyclists



BIKESTOP is a service site for cyclists that promotes services and products to the visitor. In addition, this concept has already proved to generate more income for the tourism and leisure business sector. Services offered are

- parking
- food and beverages
- information
- recharge service for electric bicycles and
- repair services.

The Bikestop also services as a rest area. Advantages for the entrepreneur are

- promotion and marketing,
- additional service,
- earnings through sales of groceries and bicycle products,
- possibility to offer package deals.

An outdoor column indicates that the visitor arrived at the Bikestop. Bikestops are part of the bicycle route network. An annual contribution of € 250 is required to participate in the concept.

Source: [www.fietstop.nl](http://www.fietstop.nl)

## 4.2.5 Organisation

The Rhine Cycle Route is a very complex project. The challenge will be to

- integrate stakeholders on local, regional, national and international level
- manage structural, political, administrative differences in four countries
- cope with approx. 250 building authorities to reach common standards of infrastructure and sign posting
- organise co-operation and co-ordinate the stakeholders and their activities
- develop an economically successful and sustainable management and distribution system for the route.

*"DEMARRAGE and the work on the market analysis is a great chance for more intense co-operation."*

The advantages of co-operation are obvious, some of them are:

- Cost saving by division of labour and more effective use of finances
- Co-ordination of activities, identification of synergy effects
- Use of wider distribution networks
- Raising awareness for the overall product
- Benefiting of other partners popularity
- Stronger negotiation position with external partners

An interesting potential co-operation partner is the **Association Rhin vivant/lebendiger Rhein**, Project INTERREG IV-A, dealing with sustainable tourism and information systems on an international basis, doing research on different topics, evaluating tourism and looking for partners, e.g. for



- Trade fairs and events
- Press conferences and press trips
- Bookable offers

**But the most important point (and the key to success) is that the Rhine Cycle Route will only become a competitive and recognisable long-distance cycle route in the European tourism market when it is marketed and promoted as a whole.**

*"On our own, alone and isolated, we never knew how to begin.  
Now it is clear, that together we can reach much more."*

All recommended activities need **financial and personal resources** to be implemented. On every level partners, stakeholders and service providers will be involved. Co-ordination and stringent organisation is necessary. A central agency for all tasks does not seem to be practicable; the foundation of a new international organisation representing the complete network of the whole Rhine Cycle Route is not feasible.

In a framework of a "round table" it could be examined, which solution is most practicable.

**According to experts the promotion of the Rhine Cycle Route through national or regional tourism marketing organisations (TMOs) is obvious.** Usually bicycle tourism is one of the professional focal points in the TMOs so that the Rhine Cycle Route can be taken care of in these departments.

However, it is essential that a good connection and network between the four countries is established. This network needs to co-ordinate the activities and define co-operation (especially cross-border distribution).

*"Regional tourism boards only talk but don't do a lot."*

The management of Veloland in Switzerland and Stichting Landelijk Fietsplatform in the Netherlands deliver exemplary national solutions and might be used as models for the development and implementation of a transnational network of the Rhine Cycle Route. The Fietsplatform is organised as follows:

#### **Stichting Landelijk Fietsplatform**

In the Netherlands the Fietsplatform became the umbrella-organisation in 1987 when a growing number of organisations revealed the need of co-ordination and co-operation. The target of the foundation is the improvement of the facilities for cycle tourism in the Netherlands. Tasks of the national cycle network are development, maintenance and promotion and the function of an expertise and advice centre for the cycle tourism in the Netherlands to meet the ambition to provide top quality and optimal usage of infrastructure and usage in the 12 Dutch provinces. Therefore a marketing plan was implanted and joint promotion activities are carried out. The Landelijke Fietsplatform also cooperates with other European organisations in order to share knowledge and experience.

Cycle tourism in Holland is so popular because of the flat topography, attractive landscapes and old towns and a high density of good cycle routes on quiet roads or cycle paths. A lot of products like routes, maps, signing, accommodation etc. have been developed. Cycling has a long tradition in Holland, both for leisure and daily routine purpose.

It is also important to define how the European co-operation will be continued after the expiry of the DEMARRAGE project.

While co-ordination should be concentrated on four organisations – one in each country – there is the **requirement of one platform** where partners and stakeholders can meet. Regular events should provide the possibility to meet in person, exchange thoughts, strengthen the network of the Rhine Cycle Route and work on new aspects. In addition a virtual platform on the web could be helpful to exchange experiences, download marketing material, press texts, provide photo galleries etc.

Other, similar projects have shown that a **co-operation contract** which administers tasks, financial and personal participation, activities and their implementation, responsibilities and competences in the network, is helpful. Ideally a common target agreement is signed by the representatives of every country. The flow of information needs to be guaranteed and an efficient communication system has to be set up to ensure that the Rhine Cycle Route becomes a sustainable, identity creating product and an important part of economic development in the nine affected regions.

*"If the Rhine Cycle Route succeeds in developing modern products, it can become the beautiful young and vibrant daughter of the Danube."*

### **Suggested time line**

From the point of view of tourism marketing the following time line would be advisable:

2011: Concentrate on internal communication, structuring, networking etc.  
Start to develop first products

Winter 2011/

Spring 2012: Start of cycling season with first marketing activities, accommodation directories, bookable offers

Autumn 2012: Print products and bookable offers (also for tour operators) for the season 2013

Spring 2013: Rhine Cycle Route is on the market (bookable offers, co-ordinated marketing, web sites, merchandising, etc.)





## 5. The 10 most important results

The aim of the present Market Analysis Report was to evaluate the potential of the transnational cycle market in general and the Rhine Cycle Route as an existing product. Product-market-strategies for the future positioning of the route in the European long-distance cycle market were developed. The ten most important results are listed below:

1. The Rhine Cycle Route has the **potential** to become one of the leading European cycle routes if it succeeds in becoming a premium product for bicycle tourists.
2. The (potential) **economic impact** of the Rhine Cycle Route is remarkable. Mostly accommodation and gastronomy providers, but also retail, transport, entertainment and other branches benefit from cycle tourism.
3. There is a general consensus that the **Rhine Cycle Route should be promoted in its entire length** to be competitive in a market that shows the **symptoms of saturation**. Therefore a **common and consequent branding** and corporate strategy is needed.
4. **Focusing on quality** in every aspect and detail is therefore the **basis of all efforts** in the tourism industry.
5. Regular **trendscouting** is necessary in order to stay up to date. Current trends are quality, individuality, flexibility, shorter and more frequent tours, luxury and asceticism, simplicity, and – as a recent product – E-bikes.
6. **Target group orientation is essential**. The most important target groups for the Rhine Cycle Route are: Cyclists from different nations, day trip cyclists, touring cyclists, families with children, groups, single cyclists, sophisticated connoisseurs, leading and traditional sinus-milieus and Target groups for niche markets.
7. Combinations with other **activities like canoeing, hiking, winetasting and wellness especially bicycle tours and river cruises** can complement cycle tourism offers and attract new target groups.
8. The transnational project communication and management needs to **overcome language, administrative and national borders and create identification** with the Rhine Cycle Route among the various stakeholders.
9. It is necessary to **raise awareness and acceptance** among all stakeholders in order to **activate the commitment** and to cultivate a positive and cooperative working atmosphere.
10. The basis for the success of the Rhine Cycle Route is an efficient transnational co-operation based on **confidence, common aims and standards**.



## 6. Literature list

Surveys, facts and figures have been evaluated for the Market Analysis Report:

Author/Editor	Title	Character	Contents
Allgemeiner Deutscher Fahrrad-Club, 2010	<b>Radreiseanalyse 2010</b>	Presentation: Survey of national relevance based on primary and secondary analysis, indicating facts and figures	Examination of the cycle tourism market
Allgemeiner Deutscher Fahrrad-Club, 2009	<b>Fahrradland Deutschland</b> , ADFC-Monitor 2009	Presentation: Survey of national relevance based on primary and secondary analysis, indicating facts and figures	Examination of cycle market, satisfaction, rental bikes, pedelecs, politics etc., especially sinus-milieu target groups
Altermodal Transports et Déplacements, 2006	<b>Etude de valorisation touristique des itinéraires cyclables alsaciens et définition d'un concept « l'Alsace à Vélo »</b>	Presentation - project development and implementation	Interpretation of the development of cycle routes in Alsace, introduction of applying methods.
Altermodal Transports et Déplacements, 2010	<b>Etude de valorisation touristique des itinéraires cyclables alsaciens et définition d'un concept « l'Alsace à Vélo »</b> (Entwicklung der Elsass-Routen)	Presentation - project development and implementation	Introduction of the implementing agency, description of the procedure of developing/implementing the project
Atout France, 2009	<b>Spécial économie du vélo - Étude complète</b>	Survey of national relevance based on primary and secondary analysis, indicating facts and figures	Comprehensive study on cycle tourism in France, contact list, incl. short version
Bourgogne Tourisme, o.J.	<b>Fréquentation et impact du Tour de Bourgogne à vélo</b>	Survey of national relevance based on primary and secondary analysis, indicating facts and figures	Introduction of Bourgogne Tourisme and analysis of cycle tourism (satisfaction, motivation, economy, target groups etc.)
Conseil Général Bas-Rhin, 2009	<b>Plan vélo 2020 - Rapport au Conseil Général Octobre 2010</b>	Presentation - project development and implementation	Presentation of the project "Plan Vélo 2020", delivering survey results
Département de l'Hérault, 2007	<b>La politique cyclable de l'Hérault</b>	Presentation - project development and implementation	Information on the current relevance of cycle tourism in Herault and description of political issues

Deutscher Sparkassen- und Giroverband ,2009	<b>Sparkassen-Tourismusbarometer Deutschland 2010</b>	Survey of national relevance based on primary and secondary analysis, indicating facts and figures	Survey on tourism in Germany in the international context
Deutscher Tourismusverband e.V., 2009	<b>Grundlagenuntersuchung Fahrrad-tourismus in Deutschland – Lang – und Kurzfassung</b>	Survey of national relevance based on primary and secondary analysis, indicating facts and figures	Survey on different aspects of cycle tourism in Germany, target groups and economic impact (long version)
Deutsche Zentrale für Tourismus e.V., 2010	<b>Incoming – Tourismus Deutschland Edition 2010</b>	Survey of national relevance based on primary and secondary analysis, indicating facts and figures	General Information on Tourism in Germany in 2010
Europäisches Tourismus Institut, 2007	<b>Regionalwirtschaftliche Effekte des Radtourismus in Rheinland-Pfalz – Tabellenband: Tages- und Übernachtungsgäste</b>	Survey - with regional relevance based on primary and secondary analysis	Primary data collection about day trip and touring cyclists in Rhineland-Palatinate, deduction of economic effects of cycle tourism in the region
Europäisches Tourismus Institut, 2007	Tabellenband: Untersuchte Radrouten	Survey - with regional relevance based on primary and secondary analysis	Statistical analysis on cycle routes in Rhineland-Palatinate and interpretation of the economic effects in the region
Europäisches Tourismus Institut, 2007	Endbericht	Survey - with regional relevance based on primary and secondary analysis	Final report on the interpretation of the economic effects of cycle tourism in Rhineland-Palatinate
EuroVelo6 Atlantique - Mer Noire, 2008	<b>Definition et mise en oeuvre d'une methode d'évaluation et d'analyse d'impact économique</b>	Presentation - project development and implementation	Information on methods of measuring and analysis of the economic impact of cycle tourism
European Parliament, 2009	<b>The European cycle route network Eurovelo</b>	Survey - with international relevance based on secondary analysis	Comparing survey on challenges and opportunities for sustainable tourism
Ift Freizeit- und Tourismusberatung GmbH, 2009	<b>Gästebefragung Rhein-Radweg in NRW 2009</b>	Survey - with regional relevance based on primary analysis	Overview of the cycle tourism in North Rhine-Westphalia
Policy department B Structural and cohesion policies, 2009	<b>The European Cycle Route Network</b>	Survey of international relevance based on secondary analysis, indicating facts and figures	Comprehensive study on cycle tourism in Europe
Rencontres des Départements Cyclables, 2008	<b>Évaluation des Satisfactions et des retombées économiques du tourisme à vélo</b>	Survey of national relevance (presentation) based on primary and secondary analysis, indicating facts and figures	Development of cycle tourism in France focusing customer satisfaction and economic impact

SchweizMobil prograns, 2009	<b>Comptages vélos de 2009 Auswertung</b>	Survey of national relevance based on primary and secondary analysis, indicating facts and figures	Introduction to the velo counting system, list of locations, first results
SchweizMobil prograns, 2009	<b>Veloland Schweiz 2009 – Jahreskennwerte und Methodik zur Auswertung der Velo-Zählanlagen</b>	Survey of national relevance based on primary and secondary analysis, indicating facts and figures	Annual parameters and introduction to the method of analysing the counting systems
SchweizMobil prograns, 2009	<b>Veloland Schweiz 2009: Ergebnisse Velo-Zählungen – Kurzfassung</b>	Survey of national relevance based on primary and secondary analysis, indicating facts and figures	Results of velo counting, short version
Stichting Landelijk Fietsplatform, 2009	<b>Informatie onderzoek LF-routes</b>	Survey of national relevance based on primary and secondary analysis, indicating facts and figures	Introduction to LF-route-research in the Netherlands
Stichting Landelijk Fietsplatform, 2009	<b>Zicht op Nederland Fietsland 2009</b>	Survey of national relevance based on primary and secondary analysis, indicating facts and figures	Information on cycle tourism in the Netherlands
Trendscope, 2010 (2008)	<b>Radreisen der Deutschen</b> , Trenscopec Marktstudie	Survey – with national relevance based on primary analysis	Overview of the German bicycle tourism market
Tourisme Alsace.com, o.J.	<b>Canaux et véloroutes</b>	Customer information: map	map of the channels and cycle routes in the region Alsace, Backside: Information about different channels and the Rhine Veloroute
Tourisme Alsace.com, 2007	<b>Le Bas-Rhin en roue libre</b>	Survey - with regional relevance based on primary and secondary analysis	Information on the potential of cycle tourist in Alsace and the region in general
Tourisme à vélo en Aquitaine, o.J.	<b>L'analyse typologique - panorama des différents pôles de représentations et profils de pratiquants</b>	Survey of national relevance based on primary and secondary analysis, indicating facts and figures	Typology of cycling tourists in Aquitaine focusing target groups
Tourisme à vélo en Aquitaine, o.J.	<b>Velo Rando Hotels Alsace</b> (Fahrradfreundliche Hotels im Elsass)	Presentation - project development and implementation	Information on cycle friendly hotels in Alsace

The following additional documents provided by the DEMARRAGE project partners have been used to get a deeper insight in the cycle markets of the different countries.

Arbeitsgemeinschaft Lebendiger Rhein, 2009	<b>3. Lenkungsausschuss RheNaTour - Sanftes Erleben einer Ramsarzone</b>	Presentation - report of meeting	3. Executive committee: Project status of Interreg IV A Projektes RheNaTour
DEPTOUR mag, 2004	<b>Démarches clients l'exigence de la qualité</b>	Article	General information on quality offensive in tourism, not specifically on cycle tourism. Characteristic numbers on economic impact of tourism
DEPTOUR mag, 2005	<b>Sports de pleine nature: Un nouvel enjeu pour les territoires</b>	Article	Information on trend active tourism. Activities of some regional organisations (CDT) in cycle tourism.
DEPTOUR mag, 2005	<b>Enjeux et Perspectives</b>	Article	General information on sales structures, characteristic numbers on the use of the internet in tourism
DEPTOUR mag, 2008	<b>Vélo et tourisme, changement de braquet?</b>	Article	Overview of cycle tourism in France incl. critique of activities of regional tourism organisations (CDT)
Kaulen, Ralf, 2008	<b>Communication and Marketing - Concept Rhine Cycle Route</b>	Presentation - project development and implementation	Introduction of the Rhine Cycle Route focusing on marketing and communication
Le Bas-Rhin en roue libre, 2009	<b>Transversale cyclo Nord-Sud - La véloroute Rhin</b>	Customer information flyer	Introduction of the Rhine Cycle Route with information on infrastructure and useful contacts
Le conseil du Bas-Rhin, 2001	<b>Tout le Bas-Rhin à vélo - Carte des itinéraires cyclables</b>	Customer information flyer with map	Information on cycle tourism, guide
Les Départements Cyclables, 2008	<b>Les différentes présentations de la journée d'étude</b>	Report of meeting	Summary of presentations at the conference of Départements Cyclables
Les Départements Cyclables, 2008	<b>12èmes rencontres des départements cyclables, Les grands itinéraires à vélo – Une approche globale d'intérêt local</b>	Report of meeting	Resume of the conference of Départements Cyclables
Les Départements Cyclables, 2008	<b>Atelier 1 / De la véloroute départementale à la véloroute européenne: les éléments essentiels: les éléments essentiels aux grands itinéraires à vélo</b>	Report of meeting	Minutes of the first LDC-Workshop: Information on the characteristics of long cycle routes and options for extending existing routes

Les Départements Cyclables, 2008	<b>Atelier 2 / Les retombées économiques du tourisme à vélo: l'importance de l'évaluation à l'échelle locale et à celle d'un itinéraire</b>	Report of meeting	Minutes of the second LDC-Workshops: Information on economic effects of cycle tourism regarding local routes and longer tours
Les Départements Cyclables, 2008	<b>Atelier 3 / Les SIG et les outils de promotion: l'importance du suivi pour les porteurs de projet et de l'information cartographiée pour le grand public</b>	Report of meeting	Minutes of the third LDC-Workshop: Information on the meaning of monitoring for project managers and detailed information for the public
Les Départements Cyclables, 2008	<b>Conclusion</b>	Report of meeting	Summary of all workshop results of the LDC-conference
Les Départements Cyclables, 2008	<b>Les grandes itinéraires de vélo</b>	Report of meeting	Opening of the meeting, information on cycle routes
Les Départements Cyclables, 2008	<b>Introduction des 12e Rencontres</b>	Report of meeting	Introduction to a meeting of Départements Cyclables
Les Départements Cyclables, 2008	<b>Restitution et table ronde conclusive</b>	Report of meeting	Summary of a meeting of Départements Cyclables
Les Départements Cyclables, 2008	<b>Observatoire National des Véloroutes et Voies Vertes</b>	Presentation - project development and implementation	Information on cycle routes, greenways and international internet routing systems
Les Départements Cyclables, 2008	<b>Résultats de l'Observatoire national des véloroutes et voies vertes/ TABLE RONDE</b>	Report of meeting	Results and discussion of analysis on cycle routes and greenways in France
Les Départements Cyclables, 2008	<b>L'Observatoire National des Véloroutes et Voies Vertes</b>	Presentation - project development and implementation	Registration of cycle routes and greenways, description of aims, methods and work steps
Région Bretagne DG2 – Service du Tourisme, 2008	<b>Les voies vertes de Bretagne...des vacances autrement.....à vélo, à pied, à cheval!</b>	Presentation - project development and implementation	Development and touristic potential of greenways Bretagne
Seine Maritime Les Départements, o.J.	<b>Projet Paris – Londres (Projekt Paris-London)</b>	Presentation - project development and implementation	Description of a touristic project to connect Paris and London
Stadtherr, Lukas, o.J.	<b>SuisseMobile (Radfahren in der Schweiz)</b>	Presentation - project development and implementation	Information on cycle tourism and its potential in Switzerland
Tourisme Alsace.com, 2009	<b>Canaux et véloroutes</b>	Customer information flyer	Introduction of waterways and cycle routes in Alsace
Val de Loire Patrimoine Mondial, 2009	<b>La Loire à vélo</b>	Customer information brochure incl. Map	"Tour guide" describing the cycle offers and other services (accommodation etc.) along the river Loire

