



Insight Department: Cycling Tourism in Scotland

May 2017

 Visit Scotland | Alba™

Welcome

Scotland currently has a National Cycle Network covering over 2000 miles, landscape that is worth seeing at cycling pace and air so clean you can't help but want to fill your lungs with it. Government initiatives are currently being implemented to increase the number of commuter and recreational cyclists in Scotland. This is not only good for the Scottish population but also good for cycling tourism. Scotland being perceived as a cycling friendly nation like the Netherlands could increase domestic and international tourism. The purpose of this paper is to provide the industry with our most up-to-date tourism monitor information on domestic cycling tourism in Scotland.



Overview

DOMESTIC OVERNIGHT TRIPS

THREE YEAR AVERAGE (2013-2015)		
	CYCLING - ON A ROAD/SURFACED PATH	MOUNTAIN BIKING
Trips (000's)	261	122
Nights (000's)	1324	466
Spend (£m)	74	43
Nights Per Trip	5.1	3.8
Spend Per Trip (£)	285	355
Spend Per Night (£)	56	93

Source: GBTS 2013-2015

On average cycling on a road or surfaced path is over twice as popular an activity to participate in when on holiday in Scotland than mountain biking. This is most likely due to the specialist nature of mountain biking compared to the relatively few barriers to cycling on a road or surfaced path. Those who

participate in mountain biking do not stay as long in Scotland as those cycling on roads and paths but they do spend 66% more per night and 24% more per trip. This spending disparity could be attributed to the cost of using mountain biking facilities.

DAY TRIPS

CYCLED - ON A ROAD/SURFACED PATH	
Visits (000's)	1000
Spend (£m)	32
Spend per Trip (£)	£32

Source: GBDVS 2015

One million day trips which included cycling on a road or surfaced path were taken in 2015 with an average spend of £32 per trip. Spending will most likely be attributed to food and drink bought whilst cycling or other activities undertaken in the day. Converting day trip cyclists to

become overnight cyclists to areas further from their region of residence could help cycle friendly businesses increase their occupancy by offering last minute cycling weekend deals in the off-season as cyclists would be likely to book last-minute if the weather looks good.



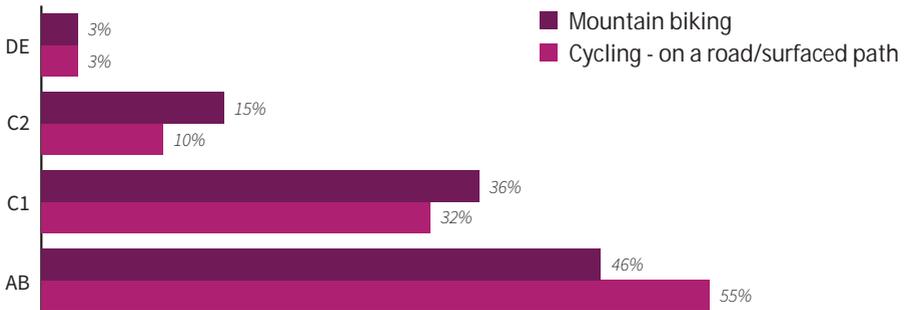
CYCLIST DEMOGRAPHICS

	CYCLING - ON A ROAD/SURFACED PATH	MOUNTAIN BIKING
GENDER		
Male	52%	76%
Female	48%	24%
AGE		
16-24	8%	14%
25-34	10%	19%
35-44	32%	29%
45-54	28%	25%
55-64	14%	11%
65+	8%	2%

Source: GBTS 2011-2015

The age and gender demographics for mountain bikers and road cyclists differ quite significantly. The mountain biking contingent who visit Scotland are more likely to be male and under the age of 45, whereas road cyclists are almost equally likely to be female as male and are predominately between 35 and 54. This is fairly unsurprising due to the differing physical and social nature of both activities.

SOCIAL CLASS OF THOSE PARTICIPATING IN CYCLING



Source: GBTS 2011-2015

The social class distribution for both mountain biking and road cycling is heavily skewed towards social class AB. Almost 90% of those who cycled on roads or surfaced paths fell into social classes C1 and AB, with 55% being in social class AB. The distribution in mountain biking is similar with over 80% of respondents falling in to social classes C1 and AB.



Accommodation Demographics

LOCATION STAYED

LOCATION	CYCLING - ON A ROAD/SURFACED PATH	MOUNTAIN BIKING
Small town	38%	43%
Countryside/ village	31%	37%
Large city/ large town	27%	19%
Seaside	25%	12%

Source: GBTS 2011-2015 (percentages may exceed 100% due to visitors staying in multiple areas)

Those who cycle tend to visit locations outside of big towns or cities with only 19% of mountain bikers staying in a large city or large town during their stay, which is not surprising due to the locations of most mountain biking facilities being more rurally based.

A slightly higher percentage of road cyclists stay in cities. Seaside locations are also fairly low for mountain bikers, which again is unsurprising due to the inland geographical distribution of mountains and therefore mountain biking opportunities.

ACCOMMODATION USED

ACCOMMODATION TYPE	CYCLING - ON A ROAD/ SURFACED PATH
Rented Self-catering - House/Chalet/Villa/Bungalow/Cottage	20%
Friend's /relative's home	18%
Hotel/Motel	17%
Caravan - Towed	9%
Holiday Camp/Village - Self-catering	7%
Caravan - Static not owned	6%
Camping	6%

Source: GBTS 2011-2015

Mountain bikers have a higher propensity to camp than road cyclists, with 15% of mountain bikers choosing to camp compared to 6% of road cyclists but due to the more rural locations stayed in by mountain bikers this could be expected. Self-catering properties and staying with friends and family are popular choices for those who cycle on roads and surfaced paths.

ACCOMMODATION TYPE	MOUNTAIN BIKING
Hotel/Motel	20%
Camping	15%
Friend's /relative's home	15%
Caravan - Towed	13%
Rented Self-catering - House/Chalet/Villa/Bungalow/Cottage	9%
Paying guest in - Other private house /B&B	6%
Caravan - Static owned	4%

Source: GBTS 2011-2015

Sparking the Cyclists Imagination



GOOGLE ANALYTICS

PAGE ON VISITSCOTLAND.COM	PAGE VIEWS IN 2016
Hebridean Way Cycling Route	54,035
Cycling in Scotland	28,814
National Cycling Routes	28,781
Mountain Biking	20,544
11 Spell Binding Routes	17,263
5 Islands Cycling Route - Blog	5,144
Mountain Biking Trails	1,303

Source: VisitScotland GoogleAnalytics Page Views 1/1/16-31/12/16

VisitScotland's website has a vast amount of content relating to cycling in Scotland, including itineraries and cycling routes. The most popular cycling page visited was the Hebridean Way Cycling route which received over 54,000 views in 2016. The Way was cycled by Mark Beaumont, a famous Scottish cycle tourer, to promote the route and the YouTube video has been viewed almost 10,000 times. Mark Beaumont's non-stop attempt at cycling the North Coast 500 saw him complete the route in under

38 hours and helped advertise the scenic route to cycle tourers.

Information on the National Cycling Routes is also a popular page showing the importance for traffic-free routes for cyclists. With over 500 miles of traffic free paths in Scotland, there are plenty of places to visit without needing to encounter a car, making it a family-friendly cycling country.

SHOWING OFF SCOTLAND ON YOUTUBE

VIDEOS ON SCOTTISH CYCLING	YOUTUBE VIEWS TO DATE
Danny MacAskill's 'The Ridge'	47,822,527
Danny MacAskill's 'Way Back Home'	38,830,107
Danny MacAskill's 'Wee Day Out'	6,641,527
Mark Beaumont NC500	9,991
Mark Beaumont Hebridean Way Cycling	9,358

Source: YouTube, 16:00 07/02/2017, views from the following channels were counted (RedBull, Cut Media, North Coast 500, Outer Hebrides, CalMac Ferries YouTube channels)

Mountain biking is very popular in Scotland and has in recent years shot to the forefront of mountain biking YouTube fame with videos from Danny MacAskill showing not only fantastic stunts but also Scotland's incredible scenery.



Cyclists Welcome Scheme

CYCLIST WELCOME SCHEME

With cycling becoming an increasingly popular way to explore, VisitScotland spent time working with the Cyclists Touring Club and the Scottish Cyclists Union to produce a 'Cyclists Welcome' scheme to meet the specific accommodation and visitor attraction needs of cyclists. The 'Cyclists Welcome' scheme accredits accommodation

providers and tourist attractions that provide adequate facilities for cyclists such as a drying room, bike storage, information on local cycle shops and free Wi-Fi to name a few. Currently over 1,000 businesses in Scotland participate in the scheme showing how important the tourism sector believes cycling is to the industry.

LOCAL AUTHORITY AREA	DISTRIBUTION OF 'CYCLISTS WELCOME' PARTICIPANTS
Highland	22%
Argyll & Bute	12%
Dumfries and Galloway	10%
Scottish Borders	9%
Perth and Kinross	7%
Comhairle nan Eilean Siar	5%
Fife	5%
Aberdeenshire	4%
Stirling	4%
Angus	3%
Moray	2%

Source: VisitScotland Cyclist Welcome Scheme Statistics as of February 2017

Highland and Argyll and Bute are the areas with the most businesses participating in the 'Cyclist Welcome' scheme. Rural areas are more likely to receive tourists who are travelling around by bike or have brought their bike on holiday with them than more built-up areas. The cities of Edinburgh, Glasgow, Aberdeen and Dundee cumulatively make up only 3% of the businesses participating in the scheme. This is most likely to be due to the fact that those on

city breaks are not likely to bring their bike with them therefore there is little need for accommodation providers to need to have cycle friendly facilities. Visitor attractions in the city are also not likely to feel a large amount of pressure to install extensive cyclist friendly facilities due to, at present, most Scottish cities not having a cycle hire system, like the one seen in London, and therefore tourists are likely to travel around the city using other methods of transport.

ACCOMMODATION TYPE	DISTRIBUTION OF 'CYCLISTS WELCOME' PARTICIPANTS
Small Serviced	38%
Self-Catering	37%
Hotels	12%
Hostel	6%

Source: VisitScotland Cyclist Welcome Scheme Statistics as of February 2017

Small serviced and self-catering accommodation providers combined make up over 70% of the businesses participating in the scheme. This is likely due to there being relatively less infrastructure required in a self-catering house to turn it in to a cycling friendly

property than a hotel or hostel, which would need to have a purpose-built drying room and secure storage installed. Self-catering properties are the most popular choice for those who cycle on roads or surfaced paths.

CYCLING EVENTS IN SCOTLAND IN 2015

EVENT NAME	AUDIENCE/ SPECTATORS	PARTICIPANTS/ PERFORMERS	TOTAL ATTENDANCE	ECONOMIC IMPACT FROM OUTSIDE LOCAL AUTHORITY (£M)	ECONOMIC IMPACT FROM OUTSIDE SCOTLAND (£M)	TOTAL ECONOMIC IMPACT GENERATED PER ATTENDANT (£)
Etape Loch Ness	1,468	3,328	5,022	0.74	0.51	249
Selkirk MTB Marathon – British MTB Marathon Championships	1,000	599	1,669	0.08	0.05	78
Tweedlove Festival	4,386	3,967	8,734	0.66	0.59	143
Tour Series- North Lanarkshire	5,000	115	5,160	0.05	0.02	14
Enduro World Series - Round 3 Tweedlove	3,410	616	4,620	0.37	0.23	130
Mountain Bike World Cup	18,186	1,014	19,575	2.80	1.00	194
Tesco Bank Tour O The Borders	5,222	2,202	7,548	0.56	0.29	113
Tour of Britain	37,500	120	38,010	0.48	1.30	47

Source: EventScotland 2015

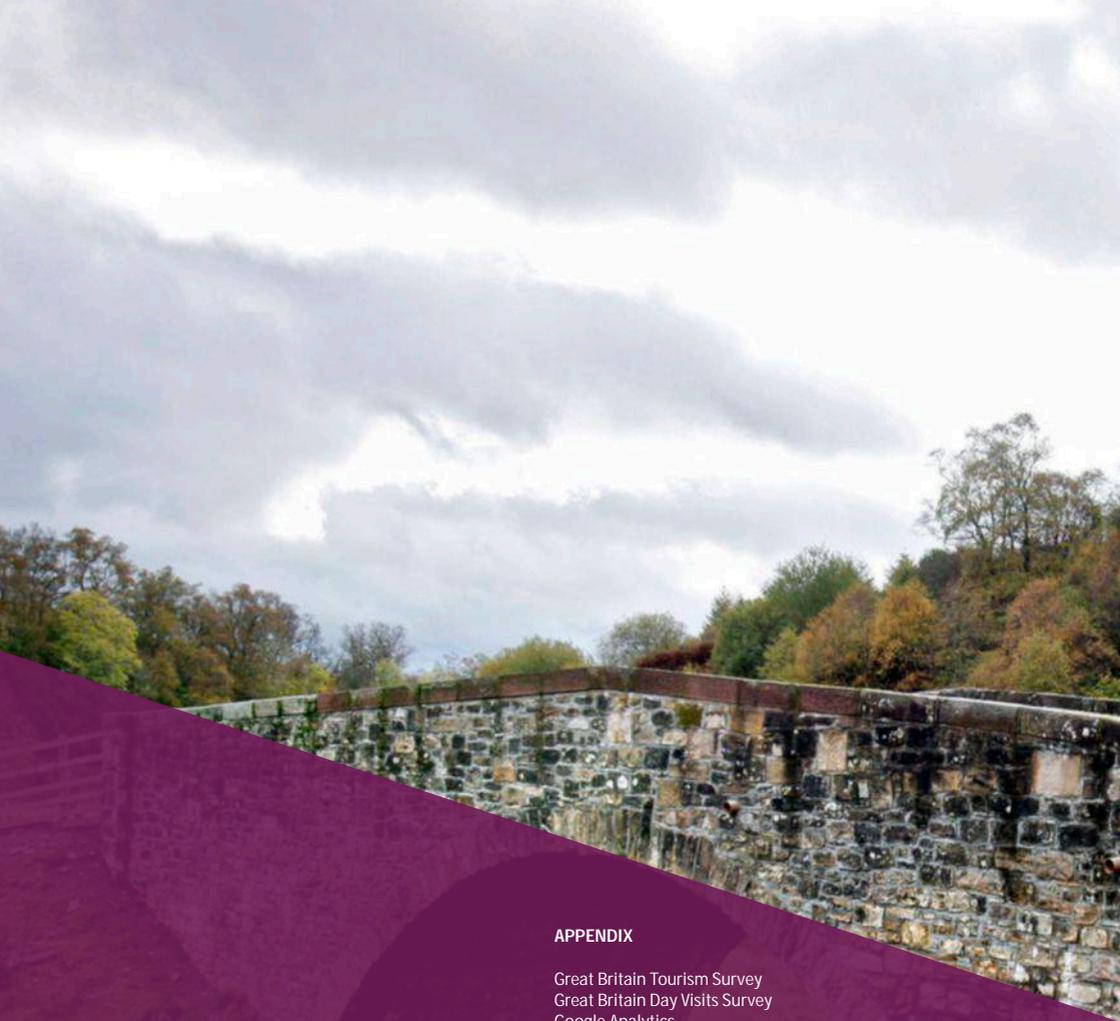
CYCLING EVENTS

From the eight cycling events listed on the previous page, £5.74 million was generated in economic impact from outside of the local authority area where the event was held and just under £4 million was generated in economic impact from outside of Scotland in 2015.

Events like the Tour of Britain and the Tour Series – North Lanarkshire have relatively low number of participants compared to spectators and due to the one day nature of the events at each location economic impact generated per person is lower than multi day spectator events. The Mountain Bike World Cup, which is held in one location over several days, generates a higher economic impact per person due to the higher likelihood that spectators will stay overnight.

Participant heavy events like the Etape Loch Ness produce high economic impact due to participants coming from afar having to book overnight accommodation. This will normally include staying the night before the race due to the early start normally associated with cycling events and are also likely to book for the night of the event due to tiredness and an unwillingness to travel home. In the case of the Etape Loch Ness, there were almost 1,500 spectators who, due to the lengthy nature of the event, will not see the person they have travelled to the event with for a few hours. This person will possibly look to do other things in that time such as shopping or eating. This discretionary spending by a captive audience can help generate extra revenue for the area hosting the event.





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APPENDIX

Great Britain Tourism Survey
Great Britain Day Visits Survey
Google Analytics
EventScotland
VisitScotland Cyclist Welcome Scheme

Our partners, VisitBritain have carried out analysis of International Passenger Survey data on the activities undertaken by international visitors to the UK. The report published in 2013, includes a section on outdoors and sport activities undertaken in Scotland.

https://www.visitbritain.org/sites/default/files/vb-corporate/Documents-Library/documents/Regional_Activities_report_FINAL_COMPRESSED.pdf

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