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ROUTES TO GROWTH

**DEVELOPING
SCOTLAND'S CYCLE
TOURISM SECTOR**



Authors:

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Executive Summary

Five years ago, our research *The Value of Cycle Tourism* highlighted the significant contribution that leisure cycle tourism brings to the Scottish economy. Last year, Sustrans Scotland published further research on this topic, estimating that cycle tourism on the National Cycle Network alone is worth £345 million in annual economic impact.

This new study builds upon that research, highlighting the benefits that cycle tourism provides to local communities. The report takes as its focus the Caledonia Way. This important National Cycle Network route runs from Campbeltown to Inverness, and has high tourism potential.

Barriers and opportunities

Our research focussed on getting an up-to-date understanding of the key barriers and opportunities for growth within cycle tourism, using the Caledonia Way as our focus.

To accomplish this, we decided to sample a range of views from those on the ground who provide services to cycle tourists on a day-to-day basis. We spoke with hospitality businesses, companies providing bespoke services to cycle tourists (e.g. tour operators, bike hire enterprises), local community groups, and even one company which provides ferry services for cyclists.

In this report, we set out their role within the cycle tourism sector, the barriers they face, and their views on the best 'routes to growth' for cycle tourism.

Routes to Growth

Our recommendations provide strategic direction for tourism industry stakeholders to take advantage of opportunities for growth and investment within the cycle tourism sector.

The recommendations flow primarily from our interviews with the local businesses, but also from our discussions with national stakeholders, and a review of other published research.

We come forward with recommendations for: better promotion of Scotland as a cycling destination, and of specific cycle routes; improving information services for cyclists; and better integration between cycling and public transport.

However, it is very clear from the views of all those we spoke to that additional bespoke infrastructure for cycle tourists is required if leisure cycle tourism is to reach its full potential for enriching the Scottish economy.

Summary of Recommendations

(See end of report for detailed recommendations)

Infrastructure

Build fully segregated cycle paths along the length of selected key tourist routes.

Further develop and maintain the National Cycle Network (NCN).

Connections

Enhance integration between cycling and public transport.

Improve cycling connections and end-of-trip facilities.

Marketing and Promotion

Promote Scotland as the world's leading destination for leisure cycling.

Improve promotion of the Cyclists Welcome Scheme, the Leisure Cycling Tourism Guide, and other similar initiatives.

Put in place a centralised online information resource for cycle tourists.

Leadership and Collaboration

Improve collaboration and leadership between tourism industry stakeholders by establishing a forum or platform to coordinate cycle tourism activity.



Camusnagaul Ferry Operator



Business Type

Ferry Operator (Cyclist and Bike Transfer)

**Dogie Robertson,
is the Camusnagaul
Ferry Operator**

Ferry Operator Benefits

The passenger ferry operates all year round from Fort William to Camusnagaul on the Moidart peninsula. It operates as part of the Great Glen Way and the Cape Wrath Trail, as well as part of National Cycle Network. Dougie said that all of these routes are getting more popular every year with increased levels of cyclists and walkers. He says that there is a mix of users, from families to backpackers.



**Camusnagaul
Ferry Operator**

Future Plans / Opportunities for Growth

Dogie took over the management of the ferry as he saw there was an opportunity to increase the number of crossings on the route. He has started to operate a second ferry from Cromarty to Nigg on the Black Isle. Unfortunately, at present the ferry only operates during the summer months. However, he would like to extend this service for longer in future years. Currently, the ferry operates as part of Route 1 on the National Cycle Network and is becoming part of North Coast 500. This crossing route has been popular with cyclists, campers and even the odd horse rider.

**Route
78**



Scottish
Canals

Canalside Cottages & Bothies

Scottish Canals



Business Type

Accommodation Provider



Business Activities

Cycle tourism is important for Scottish Canals as cyclists make up a key proportion of their customer base, alongside people boating, kayaking, fishing, running and walking.

Key Services

The services that cycle tourists commonly request are bike storage, information on bike hire, and information on routes and events.

Key Barriers

Esther feels that on-road cycle lanes need to be improved and that there is a need for more to be created throughout Scotland to increase cycle tourism. She thinks that government initiatives and funding could help to provide more on-road cycle lanes and promote their value.

Opportunities for Growth

Scottish Canals is keen to continue promoting leisure cycling and cycling holidays, with help from Sustrans to maintain the National Cycle Network. Scottish Canals have seen increased bookings for their holiday lets and increased numbers in visitors to the canals in general.

To support cycle tourism, Scottish Canals has made significant investments in towpath improvements in recent years. £3.9 million of repairs across the towpath network were undertaken last year to maintain the assets, ensure accessibility, promote active travel and provide public value.

**Esther McManus is the
Property Coordinator
at Scottish Canals**

Route
78

Macs Adventure



Jo Payne is a Product Manager at Macs Adventure



Business Type

Tour Operator (features cycle holidays)



Business Activities

Macs Adventure are a self-guided holiday company operating in the UK, Europe and worldwide. They specialise in cycling holidays, self-guided walking holidays and tailor-made adventures. The company features leisure cycling holidays in Scotland utilising the National Cycle Network encompassing quiet roads and traffic free cycleways like the Caledonia Way.

Key Services / Benefits

The company offers vital information for cycle tourists including: information on leisure cycle holidays, key cycle destinations, transport links and cycling events. For cycle holidays, they provide: quality hand-picked accommodation, door-to-door baggage transfer available on most tours, 24/7 emergency support, knowledgeable/ personal advice, and an adventure specialist.

Jo realises the benefits that tour operators can offer in promoting Scottish cycle tourism and creating cycle holiday experiences. Jo manages and develops walking and cycling holidays across the globe and, for her, cycling is the best method to discover a destination. Macs Adventure feel it is the best way to relax and experience the real Scotland 'up close and personal'. To promote and market Scotland as a cycle tourist destination they feel that while you are cycling you have time to meet the locals, discover Scotland's history and taste Scotland fine cuisine, experiencing the 'real Scotland'.

**Route
78**



Nether Lochaber Community Association



Business Type

Community Organisation

Iain Jenner is the Chair of the Nether Lochaber Community Association

Community Organisation Benefits

Iain Jenner, Chair of the Nether Lochaber Community Association, was clear that the Caledonia Way helps to benefit his local community. While it is still an emerging route, it has nevertheless been well received within the community. The route has led to an increase in cycle tourists through the area and an increase in leisure cycling.

Key Barriers/Issues

Iain thinks that vehicle speeds and road safety is an issue with the busy road next to the cycle route. The Community Association have consequently installed additional visual cues for drivers, with flower beds and picnic areas for cyclists. They believe this will help to make the area more cycle and pedestrian friendly, rather than provide the perception of a through-road route. The Community Association is in regular contact with Highland Council and the Sustrans representative for the area in relation to cycle initiatives.

Future Plans

In future the Community Association would like to consider implementing a toilet block and shower facility in the village hall for cyclists and tourists visiting or passing through the area. As a longer term initiative, the Community Association were considering taking over ownership of the Highland Council's public toilet facility and utilising the facility as an extra toilet block and shower facility for cyclists and tourists to the area.

Nether Lochaber Community Association

Route 78



Ben Thompson is the owner of Nevis Cycles

Nevis Cycles



Business Type

Bike hire company



Business Activities

Bike hire and bike sales. Cycle tourism is significant for Nevis Cycles, with bike hire making up around 20% of the business's turnover. Both leisure cycling and mountain biking are important to the business.

Key Services

The services that cycle tourists commonly request are storage, information on routes, maps, qualified bike guides and booking services (e.g. hotel recommendations and bike transportation).

Key Barriers

Ben considers key constraints to cycle tourism growth in relation to his business include the lack of cycling infrastructure and road safety initiatives, especially around trunk roads in the Highlands. He feels that more cycle infrastructure should be a key government initiative and funding priority. He suggests that more space for bikes on buses and trains could improve cycle tourism in Scotland.

Opportunities for Growth

Ben suggests that Sustrans could help with advertising his business by promoting cycle routes and working with local hoteliers and B&Bs to promote routes that pass his business premises. He suggests that developing the East Highland Way would be a valuable addition to cycle tourism in Scotland, and that additional iconic cycle routes could be developed in Scotland to promote cycle tourism in the future.



Nevis Cycles

Route 78



Greg Barclay is the owner of Saddle Mountain Hostel



Saddle Mountain Hostel

Route 78

Saddle Mountain Hostel



Business Type

Hostel Accommodation Provider



Business Activities

Cycle tourism is important for Greg's business. The majority of his customers are people cycling long distance routes, such as Land's End to John O'Groats and the Great Glen Way, as well as the Caledonia Way. Greg is optimistic that the promotional activities that Saddle Mountain Hostel has in place will increase the number of cyclists visiting the hostel.

Key Services

The services that cyclists regularly request includes bike storage, bike cleaning, bike maintenance, drying room, laundry, breakfast, and route information. Many of the hostel's cycling visitors have made multiple trips to the Highlands, both to cycle different routes and to do other activities such as hillwalking. Road cyclists in particular often tend to be relatively high net-worth individuals who are able and willing to spend money locally.

Key Barriers

Greg thinks that the key barriers for cycle tourism growth in relation to his business are busy roads and the attitude of many drivers to cyclists on these roads. He highlighted that the location of their hostel is on the A82 – a road which many people are nervous about cycling on and therefore look for quieter alternatives. Meanwhile, there is also a lack of cycle transport facilities on local buses. Greg feels that road surfaces often aren't great for road bikes (poor road maintenance and lots of potholes and fractured surfaces).

Opportunities for Growth

Greg believes that cycling in Scotland offers a great opportunity to see the country and take in its beautiful scenery at a slower pace. He suggests that leisure cycling opportunities, shorter day rides and cycle-friendly facilities should be better promoted. He believes that this is vital for cycling to become a cycling friendly country.

To increase cycle tourism opportunities for the business in future Greg suggested they could link in with promotional opportunities for long-distance routes, making the most of their cycling credentials.

Greg considered that a key government priority should be to promote cycling so it's seen as an everyday activity. He also wants to see the reduction in conflict between different modes of transport using the roads, and improved options for cyclists travelling to and around the Highlands by bus or train. He feels that the information that cyclists could expect on key cycling routes could be improved.



St Rules House



Business Type

Guesthouse B&B Accommodation Provider



Business Activities

The guesthouse, located in Ardrossan has a cycle path on their doorstep. Tour groups, couples and families all stay at Debbie's guesthouse. Debbie felt that most of her cycling guests use cycle routes in the Highlands like the Caledonian Way via the Calmac ferry from Ardrossan linked to Campbeltown. She said that larger cycle groups tend to cycle from John O'Groats to Land's End. Some cyclists also use local routes as detailed within the Ayrshire and Arran Cycle Tourism Guide.

Debbie Sutherland is the owner of the St Rules House guesthouse

Key Services / Benefits

The business refines its services based on their guests' needs. These services include flexible arrival and departure times, a laundry service and storing bikes indoors for security purposes. They also offer cyclists good shower facilities and low cost accommodation. Debbie and her husband Iain help to promote tourism in the area, with Iain owning a kilt hire shop.

Image from <https://www.visitscotland.com>

**Route
78**



SYHA Youth Hostelling Scotland



Business Type

Hostel Accommodation Provider



Business Activities

SYHA is the largest hostelling organisation in Scotland with hostels right across the country. The organisation has started looking at cycle routes that are linked to youth hostels within their network. SYHA are currently in the process of developing a new website, which will allow them to link their hostels with specific activities and established routes.

Graham highlighted that cyclists were currently a largely untapped market for SYHA but one they believed has potential to expand. SYHA's hostel locations, flexible accommodation and bike and drying facilities mean they are well placed to cater for cyclists looking to explore established cycle routes or take on new challenges.

Graham Sheach is SYHA's marketing manager

Key Services

SYHA's hostel locations, flexible accommodation, and bike and drying facilities mean they are well placed to cater for cyclists looking to explore established cycle routes or to take on new challenges. Due to SYHA's wide range of hostel locations, they can cover a variety of cycling experiences: mountain biking in Glen Nevis and Cairngorm; bikepacking in their more remote locations and islands; touring the seven hostels on the NC500; and leisure cycling, especially in the area surrounding Pitlochry. To further promote cycling, SYHA recently commissioned cycle tourist Markus Stitz to develop a specific bikepacking route linking their island locations.

Key Barriers

Graham considers key barriers for cycle tourism growth in relation to the SYHA business to include the cost and resources required to reach cyclists in sufficient numbers, and in raising awareness of the SYHA. Graham thinks that safer connections between cycle routes and greater collaboration with travel providers should be key government funding priorities.

Opportunities for Growth

Graham suggests that greater partnership working linking the travel network, accommodation and cycling experiences could be developed in Scotland to promote cycle tourism in the future. Graham thinks that cycle tourism should continue to be promoted in Scotland to highlight it as a 'must go' destination for cyclists, marketing its accessibility and developing new challenges and experiences for people to discover Scotland through cycling.

**Route
78**



Ticket to Ride



Business Type

Bike hire company



Business Activities

Bike hire and bike sales. Cycle tourism is integral to Lindsay's business, with 95% of his turnover being from this sector. Leisure cycling and road touring are most important, with mountain biking being a much lower priority.

Lindsay MacKinnon
is the owner of
Ticket to Ride

Key Services

The services that cycle tourists commonly request are bike hire, route advice, transfers and bag transport.

Key Barriers

Lindsay feels that the key barriers for cycle tourism growth in relation to his business is the insufficient provision of high quality cycling infrastructure on local and regional routes, and that investing in cycle infrastructure should be a key government funding priority. He suggests that greater provision of way-marked regional and local cycle infrastructure could also improve cycle tourism in Scotland.

Lindsay thinks that the benefits for cycle tourism in Scotland are difficult to measure. For example, someone might spend £20 per day or less hiring a bike but spend more than £100 per day on accommodation, food and or other expenses. He feels that the benefits of cycle tourism are greatest for larger companies such as accommodation providers.

Opportunities for Growth

Lindsay suggests that Sustrans could help to promote businesses better by increasing the number of regional and local signposted and traffic-free routes. He feels that the investment into cycle infrastructure is key. He believes that traffic-free segregated infrastructure is becoming the expectation for cycle tourists. He thinks that people travel by bike because the slower pace provides a relaxed experience, and helps to deepen cyclists' experience of the area.

Ticket to Ride



Route 78



Wilderness Scotland



Business Type

Tour Operator (features cycle holidays)



Business Activities

Based in Aviemore, Wilderness Scotland is a tour operator that specialises in active and nature-based travel offering a wide range of experiences across the country. In addition to walking, sea kayaking and canoe trips, the company provides road cycling and mountain biking holidays. Travelling in small groups, the emphasis is on using human power to explore Scotland's natural and cultural heritage from the Borders region in the south to the Outer Hebrides and the Orkney Islands.

Paul Easto co-founded Wilderness Scotland in 2001

Key Services

Paul explains that Wilderness Scotland offers the complete package for their guests. This includes guiding services, accommodation, transport, bike hire and food. The company offers over ten different itineraries which regularly feature routes on the National Cycle Network such as the Caledonia Way. The guides who lead the trips are an integral part of the visitor experience, bringing to life the rich cultural and natural diversity of Scotland. They also facilitate an insight into the local way of life, and draw upon partnerships with accommodations, restaurants and cafes to showcase the best of Scottish hospitality.

Opportunities for Growth

Paul thinks that recent and ongoing developments in cycle infrastructure have assisted the company in their development of new routes and experiences for their guests. Paul considers it note-worthy to see the changes that have taken place in the popularity and acceptance of cycling in Scotland since their business began 17 years ago.

**Route
78**

Recommendations

These recommendations flow from interviews with businesses in the Scottish cycle tourism sector, as well as from discussions with national stakeholders, and a review of other published research. Our intention is to provide strategic direction for tourism industry stakeholders in determining opportunities for growth and investment within cycle tourism.

Infrastructure

- **Build fully segregated cycle paths along the length of selected key tourist routes.**

Segregated cycling infrastructure should be implemented on key cycle tourism routes across Scotland. This is vital in order for Scotland to compete with other countries in Europe, where key cycling routes are often entirely traffic-free. On-road cycling routes, as is the norm in Scotland, force cyclists to mix with vehicles, which is an unpleasant and potentially dangerous experience. The Scottish Government should use the Strategic Transport Projects Review as an opportunity to identify routes with a high cycle tourism potential, and fund the creation of segregated cycle facilities along the length of these routes.

Such investment would include, firstly, the development of existing routes, filling gaps and bringing more sections off-road, but also, secondly, the establishment of new routes:

- Further development of off-road sections of routes such as NCN78 (The Caledonia Way) and NCN7 (from Inverness, via the Cairngorms, Trossachs, Glasgow, and Ayrshire to Dumfries & Galloway).
- The creation of new off-road routes, such as through the West Highlands to Skye, in order to ease the ever-increasing visitor pressure. Such investment would facilitate the future growth of cycle tourism on these routes, relieve pressure on the local road network in rural communities, and unlock further economic growth for rural communities across Scotland.
- **Further develop and maintain the National Cycle Network (NCN).**

The NCN in Scotland is over 2,370 miles long and stretches the length and breadth of the country, linking up villages, towns and cities. Data from the NCN shows that leisure cycling makes up a significant proportion of the cycle journeys made

in Scotland. To ensure that the NCN remains a key part of cycle tourism in Scotland, the Network should be further developed and well maintained through continued and increased investment from the Scottish Government.

Connections

- **Enhance integration between cycling and public transport.**

The commitment in the Scottish Government's Programme for Government towards bike carriage on the West Highland Lines is a welcome development, which we hope will set a precedent for bike carriage across the wider public transport network. However, further action is required to develop enhanced integration between cycles, buses and trains en route to a destination. The development of partnerships between Transport Scotland, cycle bodies and public transport operators should be pursued.

- **Improve cycling connections and end-of-trip facilities.**

As well as developing physical infrastructure, there is a need to improve connections between the NCN routes and other destinations (e.g. accommodation, places to eat and drink, and visitor attractions). As well as public transport connections, other start- and end-of-trip facilities on cycle routes should be improved, such as cycle lock-up facilities, showers, signage and maps.

Marketing and Promotion

- **Promote Scotland as the world's leading destination for leisure cycling.**

There is huge potential to increase cycle tourism in Scotland. While Scotland is well known for its mountain biking trails and its walking routes, there is an opportunity to better promote the leisure cycling offer to both domestic and international markets. Our discussions with small businesses reliant on cycle tourism found that they require additional support in reaching their intended markets. Promoting Scotland as a world-leading destination for leisure cycling should be achieved through the development of a strong cycle tourism brand for use across all cycle tourism activities. Additionally, cycle tourism should be better promoted through marketing campaigns and better promotion on tourism organisations' websites (for example Visit Scotland). Such promotion should include Scotland's key cycle routes and major

cycling events (e.g. Etape Caledonia). The Scottish Government and tourism industry stakeholders should provide investment to facilitate the growth of this sector.

- **Improve promotion of the Cyclists Welcome Scheme, the Leisure Cycling Tourism Guide, and other similar initiatives.**

There are many cycle guides and schemes available within Scotland to help cycle tourists. These provide information on accommodation providers and their facilities, as well as route guides, transport links, bike hire, restaurants, bike maintenance, baggage transfer, local places of interest and visitor attractions. However, these guides and schemes would benefit from additional promotion and marketing. There could be an opportunity for Visit Scotland to review the Cyclists Welcome Scheme to provide a tool to promote cycle service providers.

- **Put in place a centralised online information resource for cycle tourists.**

Information on cycle tourism in Scotland is currently fragmented between a large number of websites and in organisations' guides and schemes. Concentrating this information within a single information resource would be of particular benefit to international visitors. For example, our own Car-Free Tourism website, the guide for car-free days out in Scotland, could be expanded to include a more comprehensive list of Scottish visitor attractions, information on accommodation providers, walking and cycling routes, and public transport links.

Leadership and Collaboration

- **Improve collaboration and leadership between tourism industry stakeholders by establishing a forum or platform to coordinate cycle tourism activity.**

Stronger leadership and collaboration is required between national, regional and local stakeholders to promote cycle tourism (this includes private and public bodies). This forum or platform should have input from the following government agencies and organisations: Scottish Government (Culture, Tourism & External Affairs Directorate), EventScotland, Forestry Commission Scotland, Highlands & Islands Enterprise, Scottish Canals, Scottish Enterprise, Scottish Natural Heritage, Visit Scotland, and the National Park Authorities. It should also feature Local Authorities, key Destination Management Organisations, Scottish Tourism Alliance, and appropriate Third Sector representation.



The logo for Transform Scotland, featuring the word "transform" in a bold, lowercase sans-serif font with a circular arrow icon around the letter 'o', and the word "scotland" in a smaller, lowercase sans-serif font below it.

transform
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A large, stylized graphic on the right side of the page, consisting of overlapping circular and semi-circular shapes. One shape is filled with a dense pattern of white diagonal lines, while others are solid blue or white.

**SCOTLAND'S
ALLIANCE FOR
SUSTAINABLE
TRANSPORT**

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