

A Guide for Businesses

# Leisure Cycling Tourism





Sustrans makes it easier for everyone to walk, wheel and cycle. We work for and with communities, helping them to come to life by walking, wheeling and cycling to create healthier places and happier lives for everyone.

We inspire people to change the way we all travel every day, forging closer connections with our neighbours and reducing traffic to create a better environment and more sustainable society for everyone.

We're custodians of the National Cycle Network, a UK-wide network of traffic-free paths for everyone, connecting cities, towns and countryside, loved by the communities they serve. There are over 1620 miles of NCN across Scotland, with 695 miles traffic free.



## **“Scotland Made for Cycling”**

Invented in Dumfriesshire in 1839 by Kirkpatrick Macmillan, Scotland is the spiritual home of the bicycle.

# Discover how to benefit your business by making cyclists welcome

This guide is designed for any business that wants to make the most of the leisure cycle tourism market, improve its offering and grow its business.

A range of low-cost investments and improvements can improve your offer and set your business apart from your competitors.





# Introduction

A recent [review](#) on the value of cycling highlights the benefits to businesses of cycling, for everyday use and pleasure, cycle tourism on the NCN is worth £345m a year to the Scottish economy and offers significant health and environmental benefits.

Welcoming and inspiring places with connected cycle routes create more desirable places to live, work and visit, making people happier and healthier, providing low carbon travel and boosting local economies.

This guide outlines some practical tips on improving the quality of the visitor experience for all cyclists and potentially increasing your businesses profitability and profile.

It also offers an overview of leisure cycling in Scotland and a snapshot of the current trends.



Create more **desirable places** to live, work and visit



Low carbon **travel**



**Boost** local economies



Worth **£345m** a year







# Understanding The Leisure Cycling Market

**Cycle tourism on the NCN is worth  
£345 million per year**  
to the Scottish economy\*

Based on research by  
Sustrans Scotland in 2015.



**More than 152,000**  
**tourist visits to Scotland**

are made each year by holidaymakers  
who spend a day or  
more cycling during  
their stay.



**The leisure cycling  
season** generally runs  
between March and the  
end of October.

The market has an average of around  
**162,250 visits per year**,  
with **64%** of riders being male  
and **26%** female.



Leisure cyclists have an important economic impact, whether they are day trippers, weekenders or touring cyclists. The average length of stay is 4-6 nights with a spend of around **£64 per night**.

Scotland is an attractive destination for cyclists from all over Europe and the world. However, most leisure cyclists are domestic, from within the UK; over **53%** are from Scotland, **45%** from England and **1.9%** from Wales.

In terms of secondary markets, Germany and The Netherlands are key European markets.

[Cycling Scotland Research](#) published in December 2021 found there has been a **30%\*** increase in the number of people cycling since 2017. In 2017, the research found that **27%** of people in Scotland cycled for transport or leisure once every few months or more regularly. In 2021, the figure reached **35%**.

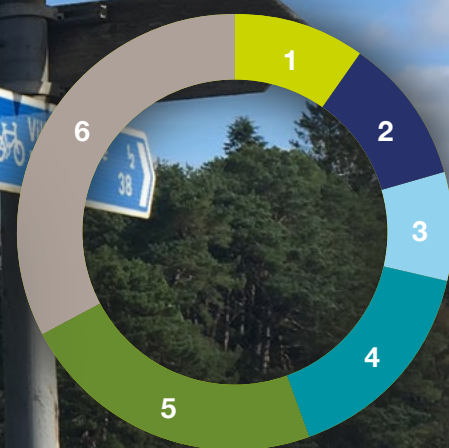
Sustrans Network report (2021) highlights that on average cycling on the National Cycling Network has increased by 12% in 2021 relative to 2019.

Cycling has gained significant popularity because it offers various benefits to peoples health and wellbeing. Moreover it serves as an environmentally friendly mode of transport and leisure activity since its carbon-neutral.

# Cycling Audience Segmentation

Research published by Sustrans Scotland in September 2021 identified six specific audience segments for leisure cycling in Scotland.

Data for this study was collected via a quantitative online survey, completed by a representative sample of more than 2,000 Scots adults in April 2021.



## 1. Committed, adventurous, enthusiasts (10%)

Cycling is a fundamental part of their everyday lives and holidays.

Age	Family	Location
49% - 25-44 years	46% have children's bicycles at home	82% live in an urban or suburban setting
17% - 17-24 years		

## 2. Confident, curious, fair-weather explorers (11%)

Cycling is a fundamental leisure/wellbeing activity.

Age	Family	Location
45% - 17-34 years	58% have children's bicycles at home	78% live in an urban or suburban areas
22% - 35-44 years		

## 3. Busy, outdoorsy, novices (8%)

Like the idea of cycling but barriers such as cost, safety and time get in the way.

Age	Family	Location
49% - 17-34 years	44% have children's bicycles at home	73% live in an urban or suburban setting
26% - 35-44 years		

## 4. Confident, habitual, exercisers (16%)

Older, confident cyclists but need inspiration and/or safe routes.

Age	Family	Location
24% - 45-54 years	32% have children	69% live in urban/suburban setting
21% - 55-64 years		31% live in rural/semi-rural setting

## 5. Nervous, inexperienced, beginners (23%)

Avid sightseers with little confidence. Need safe/easy routes and convincing that cycling is fun. This group is made up of a broad demographic. 85% would like to try cycling but are put off by barriers.

Family
26% have children

## 6. Rejectors (33%)

No future propensity to cycle. This group is skewed to older ages and a high number of people experiencing health problems.



# Key Trends and Types of Riders

Cyclists in Scotland can enjoy various biking experiences on numerous types of bikes and terrain.

However, one thing that most leisure cyclists have in common is that they are looking for places to stop off for food and drink, attractions to visit and other services such as accommodation and bike repairs.



## Mountain Biking

Mountain bikers are easily recognisable by their chunky-tired bikes, suspension forks, and baggier clothing. They often carry a small rucksack with spares and have likely been riding off-road. They enjoy technical full-suspension bikes or hard-tail bikes and love spending weekends on forest trails.

These riders don't mind getting wet and muddy, and they prefer places with outdoor seating or that don't fuss about a little dirt. They appreciate secure bike parking, good food and drinks, and a bike wash facility is a real bonus for them.

## Road Cycling

Road cyclists (Roadies) are easily identified by their traditional bikes with drop handlebars and snug-fitting clothing. They prefer stopping at places where they can see their bike.

Roadies travel light often without a lock and enjoy having something to eat and drink during their breaks. They may ride solo or as part of a larger group, such as a bike club, where all members wear matching clothing. They are usually, experienced and confident riders who are comfortable using the road.

## Gravel Biking

Gravel riding is a new form of cycling that is growing rapidly. The discipline combines the off-road element of mountain biking with road cycling to deliver an experience accessible for a wide variety of cycling abilities. Riders follow forest roads, gravel tracks and cycle paths all of a non-technical nature and generally traffic free. Riders often have high value bikes so secure bike parking is a requirement. They are often looking for food and drink during breaks.

## Touring and Bikepacking

Tourers can often be seen on NCN routes undertaking multi daytrips, often with panniers (bags attached to the bike).

They are looking for cycle-friendly accommodation with secure bike parking, information on the local area/attractions and food stops.

Bikepacking is a form of touring using off-road cycles like mountain bikes or gravel bikes fitted with special bike packing bags that fit to the frame. It's growing rapidly, but numbers are still small. These riders will likely have been wild camping and are often looking to refresh and refuel.

## Electric Bikes (e-bikes)

The use of e-bikes has increased dramatically. Halfords research indicates that up to 1.5 million could be sold in the UK by 2050.

E-bikes provide pedal assistance to tackle the hills and open up the joys of riding a bike to more people. They often allow mixed ability and fitness groups to ride together and cover longer distances.

They come in all shapes and sizes and typically have an average battery range of 60-80 miles. However, riders can extend this by recharging at local attractions, cafés and shops.

E-bikers will be looking for places with secure parking to stop off for food and drink, and attractions to visit.

## Family Cyclists

Children love cycling as it is fun and offers them freedom and independence to get around. Families are often looking for safe, accessible routes that are neither too long nor challenging. Often as part of a day trip combining cycling with a destination such as an attraction like a castle, farm or favourite café. Toilets, and good food and drink options are important factors for families.

## What's it Worth

Over £345m



The economic benefits of cycling and mountain biking tourism trips in Scotland are significant. Cycle Tourism on the NCN contributes **over £345m** to the Scottish economy every year. Mountain bike tourism adds **a further £141m** per year.

*The Value of Cycling to the Scottish Economy, Cycling Scotland (2018)*

The UK still lags behind our European counterparts in cycling uptake. For example, in Germany 25% of people cycle while on holiday compared to 3% in the UK, suggesting that there is potential for growth.

Despite the general economic slowdown felt across the UK and Europe, cycle tourism trends suggest that the sector is continuing to grow.



## 2023 UCI World Championships

In August 2023 Scotland hosted the first ever cycling mega event in the 2023 Cycling Worlds.

This huge high-profile event combined 13 existing UCI World Championships into one mega-event creating history by uniting the global cycling family and making it one of the world's top 10 sporting events. With around one million spectators in Scotland over 11 days, this was unique opportunity to showcase Scotland as a world class cycling destination. There is a huge opportunity for cycle tourism to build on the legacy of this event.



Around  
**1 million**  
spectators







# What do Leisure Cyclists Want from Businesses?

A warm welcome is the ultimate way to ensure you are cyclist-friendly! Ask guests how their ride was, what was good, what they enjoyed and what could be better. You will be able to use this information and pass it to other future visitors.

## Get The Basics Right

### Bike Security

The most important thing cyclists will look for is secure bicycle storage, particularly for overnight stays. Can you provide this? It doesn't have to be fancy, but it must be secure. Any of the following would be ideal:

A lockable garage, shed, outhouse or room. Possibly a basement cellar or secure ground floor room

If you are a café, shop or visitor attraction, is there somewhere bikes can be left that can be seen and is safe and secure? This could simply be an existing structure suitable for locking bicycles to, something custom-made or purchased.

Why not also consider providing some high-quality locks that cyclists could borrow while using your facilities, particularly if you get lots of road cyclists travelling light?

Cyclists want their bikes parked where they can be seen and where they will not get damaged. There are many manufacturers offering a wide range of racks. Sheffield stands are recommended.

There may be support available to provide secure parking. <https://www.transport.gov.scot/active-travel/active-travel-funding-opportunities/>

### Local Information

Provide local information which will be of interest to visiting cyclists.

Nothing beats local knowledge. Share your inside knowledge, offer information on the local cycling opportunities to and from your location and the area around it.

This might include:

- Maps, trails and route guides
- Public transport information
- Cyclist-friendly places to eat
- Daily weather forecasts
- Local bike shops for repairs
- Cycle hire
- Local attractions and activities

If you can provide this on-site as well as on your website and social media, this will help cyclists to plan to visit you on their trip.



## Washing and Drying Facilities

Given Scotland's changeable climate, cyclists would welcome the chance to wash and dry wet or muddy clothes and shoes in preparation for their next day's adventures. Are you able to provide access to washing facilities and a drying room?

### Bike Wash

When bikes can cost thousands, care and maintenance is crucial. An outdoor hose or even a coin or card operated bike wash to clean bikes after a long and muddy ride will be welcomed by all cyclists. If a hose is not an option, a bucket, some dish washing brushes can offer a simple solution.

### Know the Code

Scotland offers unparalleled rights of access to open spaces and the countryside. Enjoying access rights also means acting responsibly. You can help ensure visitors are aware of the Outdoor Access Code

## Flexibility

Leisure cyclists on holidays may arrive late and leave early and might want to stay for one night only. Are you set up for this?

For example: Can you provide a simple lightweight packed lunch, an early breakfast or a hot meal in the evening? Flexibility and excellent customer service can help boost your reputation and keep customers returning.

### Cyclist-friendly food and free water bottle refills

Offer to fill up water bottles for free and promote this service! After several hours in the saddle cyclists can be a hungry bunch:

- Can you do a cyclist special meal deal?
- How about a discount for anyone arriving by bicycle?
- For self-catering accommodation can your cycling guests pre-order food and drink?



## Going the Extra Mile

### Maintenance Facilities

A few simple maintenance facilities can make a real difference for cyclists. These could include:

- A track / floor pump
- Puncture repair kits (to purchase if necessary)
- Allen keys and spanners
- An old rag and some chain oil
- A [cycle maintenance stand](#) for outdoor use (24 hours)

### Baggage Transfer

Could you offer a luggage transfer service and deliver your guests bags to their next destination? This could be a paid service, and if you promote in advance it could be another income stream.

### Offering Discounts and Incentives for Cycling Visitors

Offering discounts to cycling visitors is another good way to attract them. These can cover café and entry deals. Other incentives might include free water bottle top-ups and e-bike charging.

### Adding Value To Your Offer

If you are a B&B or guest house there is a lot you can do, such as having secure bicycle storage and a drying room. Provide towels in case of wet weather, and for the growing number of e-bikes have somewhere to charge their battery.



## The Broch Café, Strathyre

The Broch Café is an award-winning family-run café on NCN7 in Strathyre. It's a popular stop with cyclists and the business is growing from strength to strength. They have plenty of racks for securing bikes and a bike maintenance station and pump, as well as a Bosch fast charger for customers on ebikes to use while they enjoy lunch or a drink.

**Lesley Johnston, the owner, said:**

“Our pump and bicycle maintenance station was installed by Sustrans and has been regularly used by our cycling clientele, both locals and visitors alike. We receive positive comments from all who use the facility and many are pleasantly surprised to find that such a maintenance station is available.

As a cycle friendly cafe, being able to promote that we have a pump and bike repair station available is a great marketing tool and one which we are sure will continue to attract cyclists of all ages and abilities to the Broch Cafe and the village of Strathyre.”







## Case Studies

# The Brig o' Turk Tearoom

The Brig o' Turk Tearoom is a quaint 1920s tearoom, nearly 100 years old. Today, it's a busy vegetarian café situated in the heart of the Trossachs. They make their own scones, cakes, traybakes and soda bread in house on a daily basis and it's a popular stop for cyclists, just off NCN7 Lochs and Glens Way. A bike maintenance station and pump were installed in the summer 2022.

### Owner Kay Hill explains:

“When Sustrans offered us a bike pump and maintenance station to install at the tearoom, we thought what a nice thing to have. What we didn't realise was how quickly it would become an essential resource for cyclists who make the most of this area. On a number of occasions, we have been told that the tools have 'saved the day' and stopped a nice cycle around the Trossachs turning a bit sour. There has been a great deal of positivity surrounding the maintenance station and its accessibility, which means it can be used even when the Tearoom is closed.”



# Cyclists Welcome Schemes



**VisitScotland**

The VisitScotland Cyclists Welcome Award is recognised nationally and is available for accommodation providers including self-catering and camping/caravanning.

**How to Apply for the Quality Assurance Scheme**  
**| [VisitScotland.org](https://www.visitScotland.org)**



**Cycling UK**

Cycling UK operate a long-established Cyclists Welcome scheme which includes listings of accommodation providers, cafes, attractions and cycle hire operators.

**Cyclists Welcome | The place to plan your cycling**



**Cycle in the Park**

Cycle in the Park Welcome Scheme is designed to help and support tourism businesses in The Loch Lomond and Trossachs National Park

**Cycle in the Park Welcome | Trust In The Park |**  
**Loch Lomond And The Trossachs Countryside Trust**  
**| National Parks Scotland | Conservation | Heritage |**  
**Recreation | Walking | Landscape | Volunteer | Charity**

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