



# Scotland. Made for Cycling.

Cycling Topic Paper | January 2023

 Doune Castle, Stirling

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 Visit  
**Scotland** | **Alba**<sup>TM</sup>

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## Welcome

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A 1,643 mile-long National Cycle Network that includes over 700 miles of traffic-free routes, numerous waymarked trail networks in and around towns and cities and miles upon miles of wild trails that can be accessed responsibly by following the Scottish Outdoor Access Code. World-class infrastructure such as the Sir Chris Hoy Velodrome, a growing number of bike parks that help develop riders' skills and confidence, and over 25 dedicated mountain biking centres. These are just some of the unique features of Scotland's great cycling offering that allows riders of all abilities, from first-timers to seasoned enthusiasts, to explore our nation on two wheels.

Over 2.3 billion cycle tourism trips take place in Europe every year at an estimated value of £37 billion. This highlights the huge opportunity on offer for Scottish cycling tourism to further develop and for Scotland to establish itself as a world-class cycling destination.



The overall value of Scotland's **mountain biking** sector was **£105m in 2015** and is predicted to rise to **£158m by 2025**.

(Source: [Frontline Ltd Report](#))

 The Deeside Way, The Cairngorms National Park

Having already hosted several high-level events such as the UCI Mountain Bike World Cup at Fort William (since 2002), the Tour of Britain and the Enduro World Series, Scotland has a proven track record of success when it comes to hosting large-scale cycling events. In August of 2023, the spotlight will shine on our nation once again as we host the 2023 UCI Cycling World Championships – the biggest global cycling event in history. This will present the opportunity for transformative and policy-led change for Scottish cycling and cycling tourism, in the lead up to and beyond 2023.

The purpose of this paper is to provide the industry with the most up-to-date information on cycling tourism in Scotland as well as give an insight on new and upcoming trends in the world of cycling.

## Using insight to inform our visitor offering

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This report focuses on the importance of cycling as part of Scotland’s visitor offering. We begin by looking at the proportion of visitors who took part in road cycling and mountain biking from international markets, before exploring key characteristics of GB resident “domestic” overnight trips and day trips. Based on GB resident day trips, we also look at statistics on the consumer profile and trip seasonality. We then explore the cycling audience segmentation outlined by Sustrans Scotland, followed by international and domestic cycling market potential, VisitScotland.org marketing statistics and cycling events in Scotland. Finally, we look at examples of best practice from key competitor markets, before concluding with several upcoming trends that will offer new opportunities for the tourism sector and shape the future of cycling trips in Scotland.

The purpose of this Topic Paper is to use research findings to support everyone involved in delivering and maximizing the potential of cycling experiences across Scotland. We have used data from several sources to build a representative picture of how the cycling market across the nation has changed over the past few years. These include the Great Britain Tourism Survey (GBTS), the Great Britain Day Visits Survey (GBDVS) and the Visitor Survey 2016 for data on domestic and international markets. Research by Sustrans was used to identify the 6 cycling audience segments. Data from the Statista Global Consumer Survey, the Office for National Statistics (ONS) Consumer Trends and Transport Scotland were used to analyze market potential. VisitScotland Google Analytics page views were used to understand consumer interests within cycling through marketing statistics. EventScotland 2021 data was used to analyse the performance of cycling events between 2019 and 2021. To provide an insight on competitor markets and cycling trends, information was drawn from Statista as well as numerous cycling focused webpages.

The following points and limitations are to be considered when reading this Topic Paper:

- i) The most up to date datasets were used at the time of writing of this Topic Paper. Due to COVID-19 related disruption in data collection methodologies, the latest available data in many cases is from 2019 or earlier.
- ii) All road cycling and mountain biking volume and value figures taken from the GBTS and GBDVS are based on trips where cycling activities that were undertaken at any point (not necessarily the main activity of the trip).
- iii) Consumer profile and seasonality statistics are based on domestic day trip figures.
- iv) GBTS volume and value figures for 2012, 2014 and 2016 were not available, therefore 3-year average calculations were made using only figures from the years where data was available.

# Cycling Tourism Performance

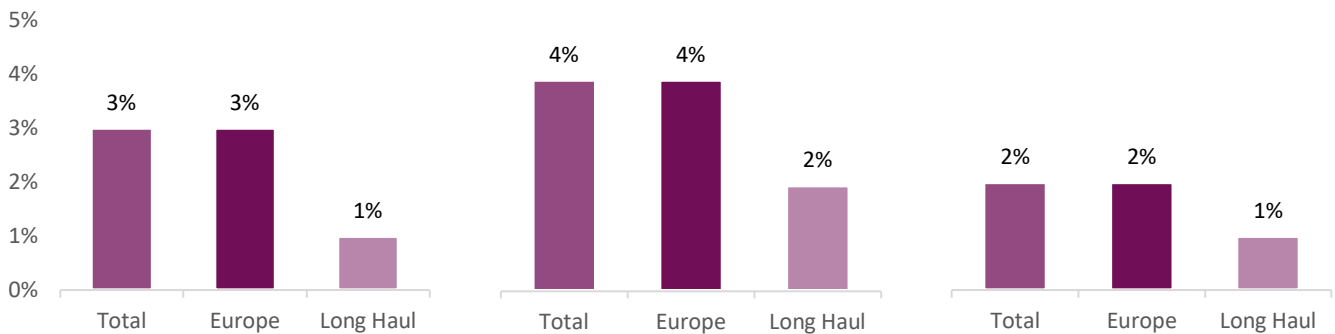
## International Trips

### Proportion of total, European and long-haul visitors who cycled in Scotland

#### Cycling as a mode of transport

#### Cycling - on a road/surfaced path

#### Mountain biking




Source: Visitor Survey 2016

Less than 5% of the total, European and long-haul markets take part in a cycling activity in Scotland. Cycling as a mode of transport is three times more popular among European visitors compared to long-haul markets. Within Europe, Ireland, Belgium and Poland have the highest proportion of visitors that prefer to get around by bicycle, while New Zealand has the highest among the long-haul markets. Road cycling and mountain biking display a similar pattern, with the proportion of visitors that undertake both activities being twice as high among European compared to long-haul markets. Visitors from Ireland, Belgium and New Zealand are the most likely to take part in road cycling, while visitors from the Netherlands, India and South Africa are the most likely to take part in mountain biking. The reason that cycling is more popular among the European markets may be due to the shorter travel distance required to reach Scotland from Europe, as well as having the choice of multiple modes of transport. This allows cyclists to more easily transport their own equipment and therefore are more likely to prefer Scotland as a cycling destination.



© Kenny Lam, VisitScotland

 7stanes Glentress, Scottish Borders

# Cycling Tourism Performance

## Domestic Overnight Trips

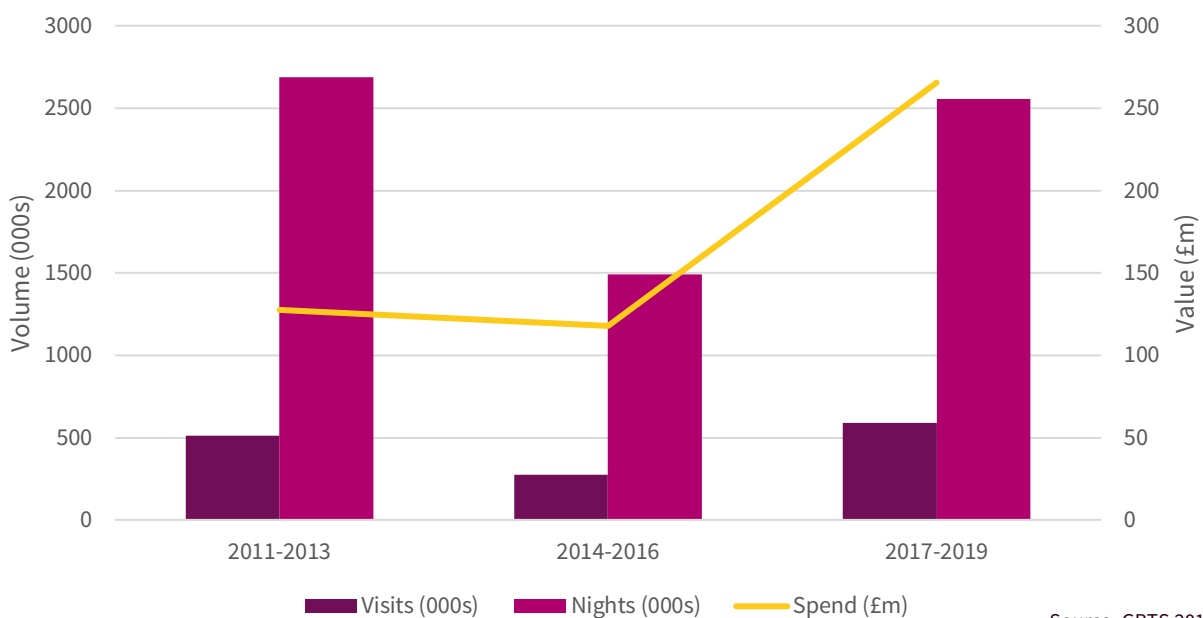
### Trip characteristics of overnight cycling trips (three-year annual averages 2017-2019)

	Cycling – on a road/surfaced path	Mountain biking
<b>Trips (000s)</b>	338	251
<b>Nights (000s)</b>	1322	1234
<b>Spend (£m)</b>	£154	£112
<b>Spend/trip (£)</b>	£456	£446
<b>Spend/night (£)</b>	£116	£91
<b>Length of stay (nights)</b>	3.9	4.9

Source: GBTS 2019

Cycling on a road or surfaced path is more popular among holidaymakers to Scotland than mountain biking. Those who prefer to mountain bike do tend to stay for slightly longer periods of time but spend slightly less compared to those who choose to cycle on a road or surfaced path. The difference in popularity between the two activities may be due to road cycling being considered as more accessible towards beginners and families, which are the largest groups among locals who cycle, versus mountain biking that may be more popular among adventure seekers and enthusiasts.

### Timeseries of visits, nights and expenditure associated with overnight cycling trips



Source: GBTS 2019

Cycling on a road/surfaced path and mountain biking made a recovery in 2017-2019 following a slight drop in popularity in 2014-2016, displaying the highest levels of associated overnight trips in the past decade. The total annual spend from both activities also increased steadily over the years, reaching a record high of over £266 million combined.

# Cycling Tourism Performance

## Day Trips

### Volume and value of cycling day visits in 2019


	Cycling – on a road/surfaced path	Mountain biking
<b>Trips (000s)</b>	585	128
<b>Spend (£m)</b>	£14	£2
<b>Spend/trip (£)</b>	£24	£12

Source: GBTS 2019

Over half a million day trips which included cycling on a road or surfaced path and over one hundred thousand which included mountain biking, were taken in 2019. At £24, the associated average spend per trip was twice as much among road cyclists compared to mountain bikers. The difference in spend may reflect that there is less infrastructure near or along trails that mountain bikers tend to ride on, compared to road cycling trails that more often tend to pass through busier towns or cities.



© Keiran J Duncan, Wild About Argyll

 The Big Strand on Laggan Bay, Islay

# Cycling Tourism Performance

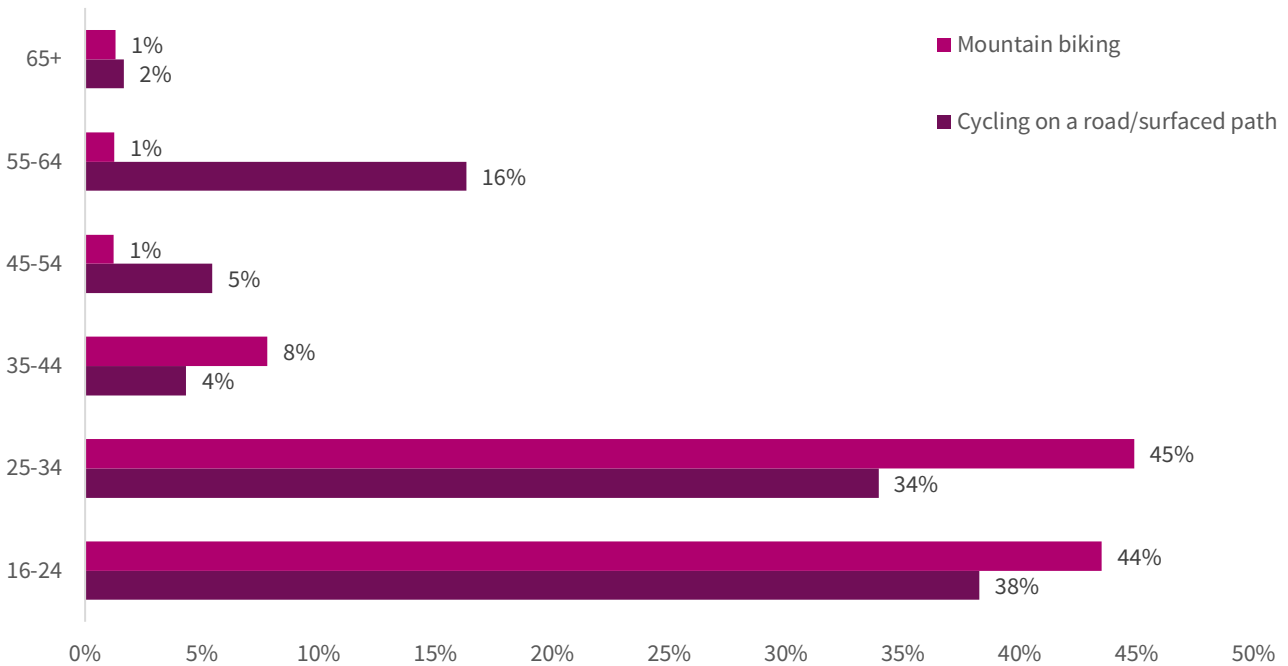
Consumer Profile: Day Visitors

## Proportion of visitors who participate in cycling in Scotland by gender

	Cycling – on a road/surfaced path	Mountain biking
Male	47%	66%
Female	53%	34%

Source: GBDVS 2019

## Proportion of visitors who participate in cycling in Scotland by age group



Source: GBDVS 2019

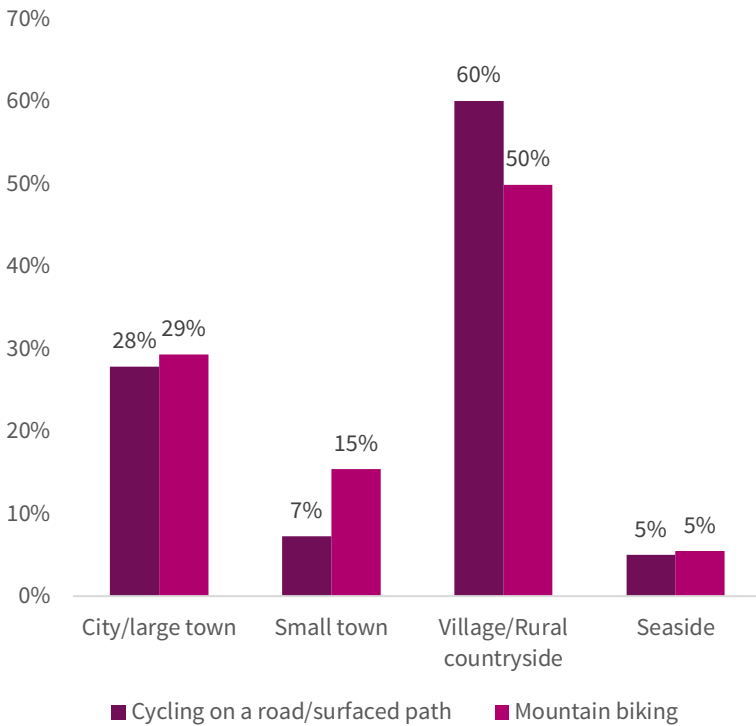
The age and gender demographics of visitors who participate in road cycling and mountain biking differ significantly. Visitors who participate in mountain biking are nearly twice more likely to be male, whereas road cycling is almost equally as popular among male and female visitors. The vast majority of both mountain bikers and road cyclists tends to be below the age of 35, although a significant proportion of road cyclists are also between the ages of 55-64. The differences in age and gender demographics between the two groups are likely to be due to the differing physical and social nature of each activity. This could soon change with the rise in e-bike popularity and affordability, making both road cycling and mountain biking more accessible to older age groups.



# Cycling Tourism Performance

## Places Visited and Season of Visit: Day Visitors

### Type of place visited

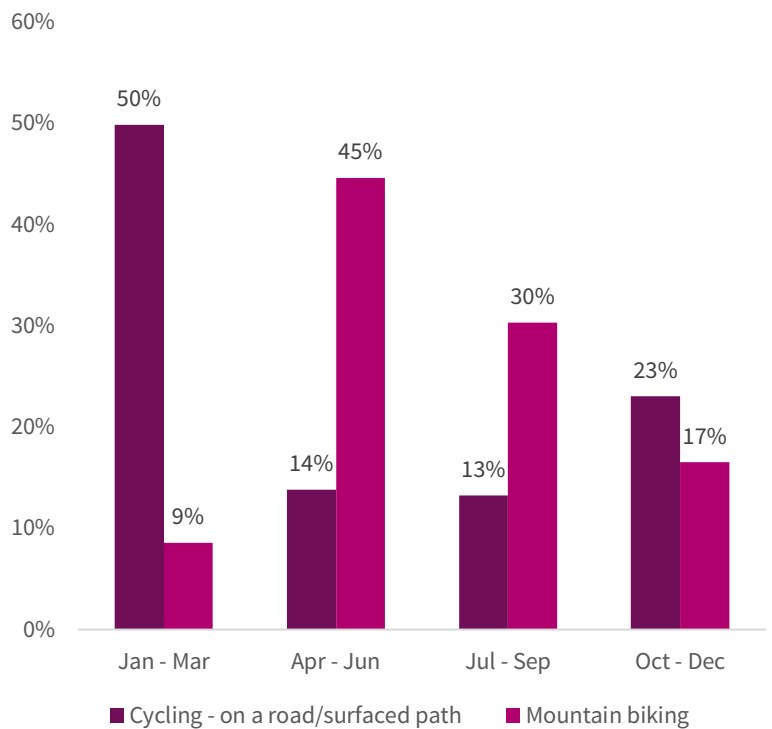


Source: GBDVS 2019

Visitors who either take part in road cycling or mountain biking during their trip show very similar preferences in the type of place they choose to visit. Villages and the rural countryside are the most popular locations, followed by cities and large towns. Both groups are least likely to visit a seaside location. This trend is likely due to the numerous scenic cycle routes found within the rural countryside as well as the many designated cycle paths found within cities and large towns, making these locations more favourable and attractive to cyclists.

The first and last quarters of the year are the most popular among road cyclists to take a day trip, with half of all road cycling trips taking place between the months of January and March. This may be due to there being less visitor traffic during the traditional off-peak season, making roads much quieter and safer for domestic road cyclists. Mountain biking on the other hand is much more popular during the second and third quarters of the year, with the majority of trips taking place between the months of April and June.

### Season of visit



Source: GBDVS 2019

## Cycling Audience Segmentation

Research published by Sustrans Scotland in September 2021 identified six specific audience segments for leisure cycling in Scotland. This allows industry partners to create more targeted and effective marketing campaigns, promotions and interventions. Data for this study was collected by means of a quantitative online survey, completed by a representative sample of more than 2,000 Scots adults during April of 2021.



### 1. COMMITTED, ADVENTUROUS, ENTHUSIASTS – 10%

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

Age: 49% - 25-44 years, 17% - 17-24 years

Family: 46% have children's bicycles at home

Location: 82% live in an urban or suburban setting



### 2. CONFIDENT, CURIOUS, FAIR-WEATHER EXPLORERS – 11%

Cycling is a fundamental leisure/wellbeing activity.

Age: 45% - 17-34 years, 22% - 35-44 years

Family: 58% have children's bicycles at home

Location: 78% live in an urban or suburban setting



### 3. BUSY, OUTDOORSY, NOVICES – 8%

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

Age: 49% - 17-34 years, 26% - 35-44 years

Family: 44% have children's bicycles at home

Location: 73% live in an urban or suburban setting



### 4. CONFIDENT, HABITUAL, EXERCISERS – 16%

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

Age: 24% - 45-54 years, 21% - 55-64 years

Family: 32% have children

Location: 69% live in an urban or suburban setting, 31% live in rural or 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.

## Market Potential

### International Interest and Participation

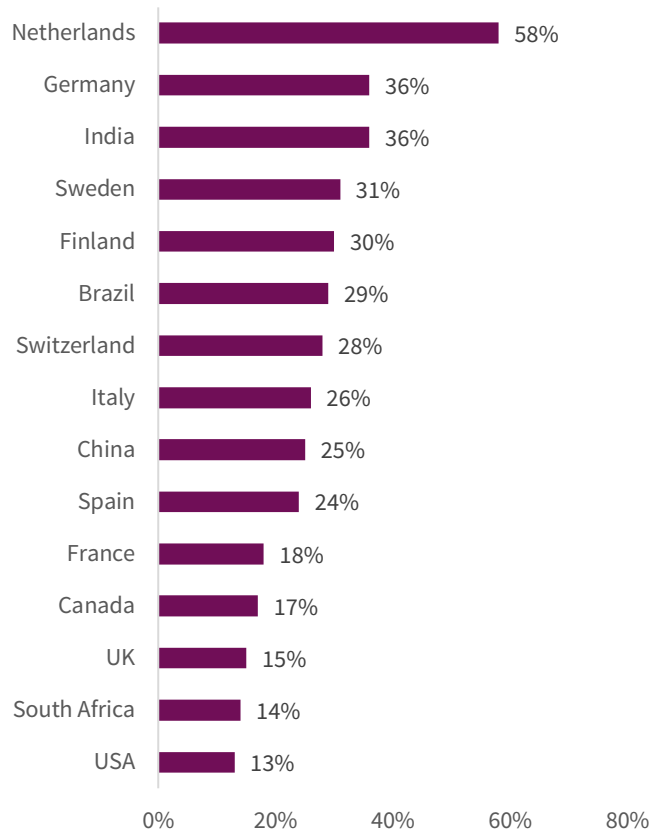
Cycling is a very popular and important activity in several countries that are major international visitor markets to Scotland. This is highlighted by resident's frequent use of a bicycle as a means of transport in their home country. People in the Netherlands are by far the most likely to use a bicycle, with more than half of the population having used their own bike as a means of transportation at least twice a week in 2020. Other European countries such as Germany and the Nordic countries also display a high level of participation in cycling, as do India and China.

Based on their frequent cycling habits, the Netherlands, Germany, India and the Nordics are particularly interesting target markets for cycling tourism to Scotland. As they show a high level of participation in everyday cycling, visitors from these countries are likely to be more experienced cyclists opting for more specialised and intense experiences.

Although other top overseas markets to Scotland such as France, Canada and the USA do not show as much of an interest in everyday cycling, visitors from these countries may still offer opportunities as target markets, opting for cycling tourism packages aimed at less frequent leisure cyclists.

The ScotRail Highland Explorer is a pilot project that runs along the West Highland Line from Glasgow Queen Street to Oban, offering carriages with storage space for up to 20 bicycles. This is an example of how visitors of all abilities and experience levels can be a target market for cycling tourism. Travelling on this service, visitors have the opportunity to access some of the country's finest scenery and visitor attractions, with a number of cycling routes available directly from stations along the West Highland Line, all while reducing their carbon footprint. This active travel option allows the experienced enthusiasts as well as beginners and families to combine rail travel with cycling/e-biking in the way that best suits them, whether that's for multi-day adventures or leisurely day trips.

**Proportion of residents who used their own bike for transportation twice a week or more**

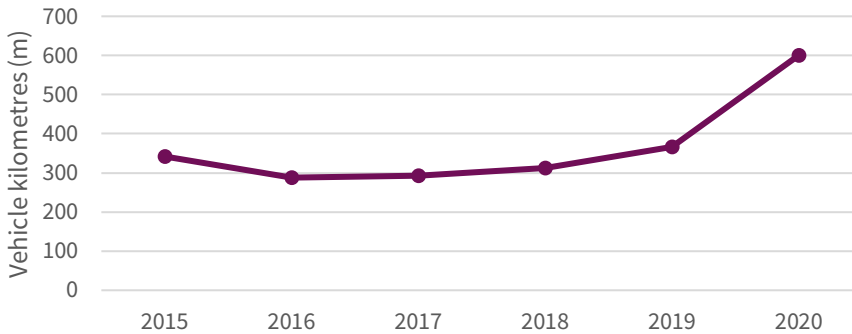


Source: Statista Global Consumer Survey, 2021

## Market Potential

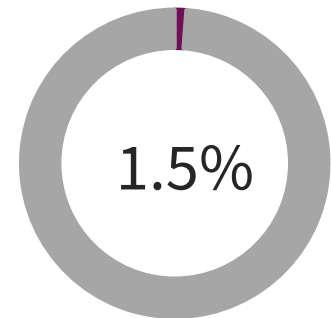
### Domestic Interest and Participation

#### Total kilometres cycled annually across Scotland



Source: Transport Scotland

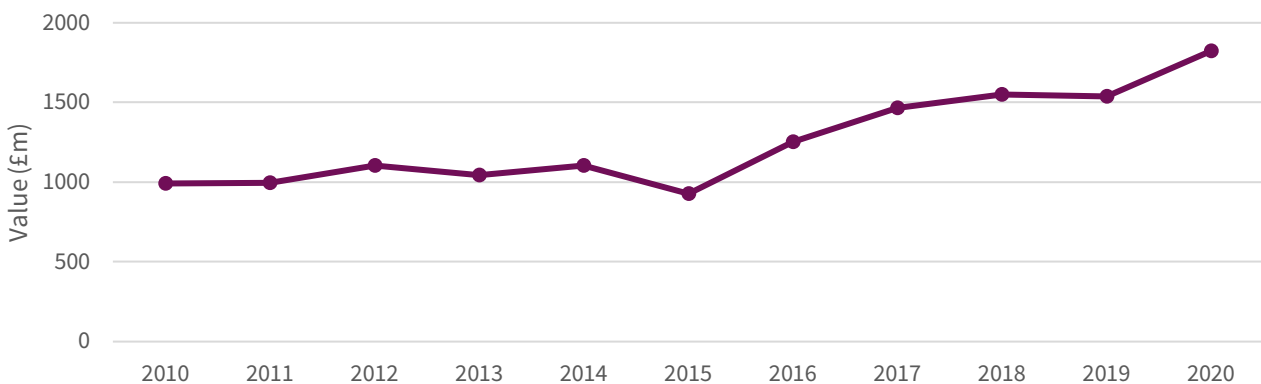
#### Mode share of cycling in 2020



Source: Transport Scotland

The overall kilometres cycled annually across Scotland has risen over the past 5 years, surpassing 600 million kilometres in 2020. As a result of the COVID-19 pandemic and associated government restrictions, it is likely that some Scots residents preferred methods of active travel such as cycling, rather than the use of public transport. Cycling reached a modal share of 1.5% in 2020 across Scotland, an increase from 1.2% in 2019.

#### Value of total bicycle purchases annually - UK



Source: Consumer Trends, ONS

The value of annual bicycle sales across the UK has increased in the past decade, reaching an all-time high of £1.8 billion in 2020. The COVID-19 pandemic is likely to have influenced this, with UK residents looking for active ways to spend time outdoors, as well as safer alternatives to crowded forms of public transport.

In August of 2023, Scotland will host the 2023 UCI Cycling World Championships – the biggest cycling event in history, becoming the first nation to host all 13 combined championships. Having the spotlight on Scotland is likely to benefit the cycling tourism market in the country for years to come. It is anticipated this will lead to an overall increase in interest and participation in cycling within Scotland and the UK resulting in more domestic visitors choosing to partake in cycling as part of their day trip or overnight visit.

## Market Potential

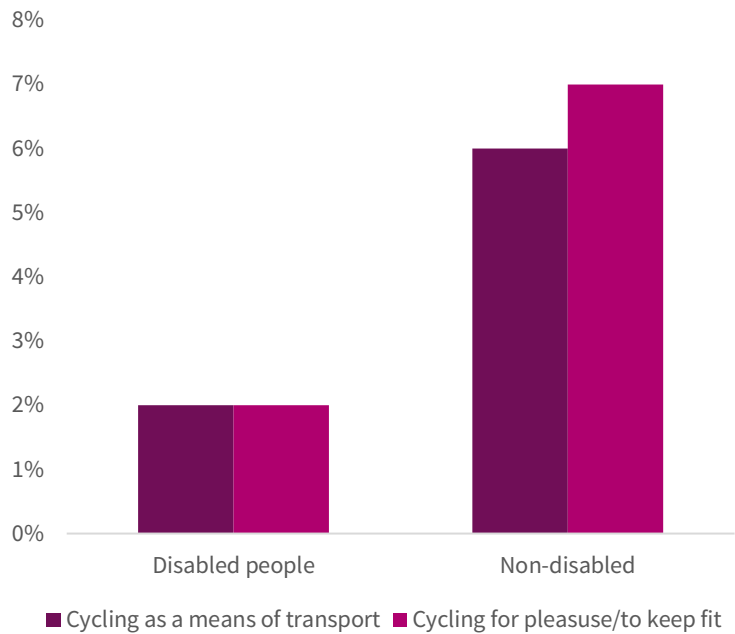
### Accessibility in Cycling

Cycling, although less popular, is an activity that disabled people in Scotland do partake in, both as a means of transport and for pleasure. A survey by Transport Scotland in 2019 found that 2% of disabled people cycled frequently as a means of transport and a further 2% cycled frequently for pleasure or to keep fit.

There are a number of ways that cycling in Scotland is made accessible to all members of the community regardless of age, fitness level or disability:

- Forestry and Land Scotland is responsible for improving and developing a number of cycling and mountain biking trails to a standard that make them accessible for everyone. Such trails take into consideration factors such as gradient, terrain, resting areas and parking availability, ensuring that they can be enjoyed by all in the same way.
- Adapted disability bikes are available to purchase or hire through several bicycle shops and centres across the country. These include hand cycles, tricycles, wheelchair bikes, electric scooter bikes, tandem bikes, low step through bikes as well as many other types. The wide variety of models available allow people who would otherwise not be able to cycle to now take part safely and confidently.
- There are a number of schemes across Scotland that enable those who would not usually cycle due to disability, age or for any other reason, to experience cycling and become an active part of their community. These include [Cycling Without Age Scotland](#), which operate all around Scotland and the UK, as well as [All Ability Cycling sessions by Live Active](#) in Perth.

Cycling disability status in Scotland 2019



Source: TATIS, Transport Scotland



A sign post directing cyclists to the HArTT Cycle Route

## Marketing Cycling Experiences in Scotland

### VisitScotland Website Traffic – 3-year average (2019-2021)

Page on VisitScotland.com	Views
Cycling in Scotland	238k
Cycling Routes & Paths in Scotland	130k
Sustrans Map of Cycle Routes in Scotland	101k*
11 of the Best Cycling Routes in Scotland	42k
Hebridean Way Cycling Route	41k
Mountain Biking in Scotland	21k
6 Family-Friendly Cycle Routes in Scotland	15k
10 Cycling Routes for Beginners	8.5k
5 Stunning Cycle Routes on Scotland's Islands	6k
10 Family-Friendly Mountain Biking Trails in Scotland	5.4k

\*2-year average (2020-2021)

Source: VisitScotland Google Analytics Page Views 2019-2021

VisitScotland's website offers cycling content to inspire potential visitors, including routes and itineraries. The website's general cycling page received over 230,000 annual views on average between 2019 and 2020. Pages about cycling routes were by far the most popular, receiving well over 250,000 views annually over the same period. This shows that traffic-free routes are important to cyclists looking to explore Scotland. With more than 700 miles of traffic-free cycle routes along the National Cycle Network and many more within wild trails and mountain biking centres, there are numerous places to visit without having to encounter other vehicles, making Scotland a family-friendly and safe cycling destination.

The Hebridean Way cycling route was a particularly popular route among VisitScotland site visitors, getting over 40,000 average annual views. As part of the launch back in 2016 this route was promoted by Mark Beaumont, a record-breaking Scottish cyclist, who completed all 185-miles in just 24 hours. This extraordinary challenge helped advertise the stunning Hebridean Way route to cycle tourers across Scotland and globally.

Mountain biking was also among the top visited pages, receiving around 21,000 views annually on average. This is to be expected since Scotland's stunning landscapes and excellent range of purpose-built trails make it a world-class mountain biking destination, with something to offer for all mountain bikers.

## Cycling Events in Scotland

Between 2019 and 2021, we looked at twenty VisitScotland-funded cycling events that took place throughout Scotland, attracting an overall attendance of 569,000 spectators and participants. Overall, a total of £21.8 million in economic impact was generated as a result of these events.

Cycling events between 2019 and 2021 created more than **1900 employment opportunities**, of which 6% were full time positions. Additionally, more than **3300 volunteering opportunities** were also created.


Over the three-year period, at £10.8 million, 2021 generated the greatest economic impact from cycling events. The 2021 Tour of Britain was responsible for nearly 90% of this figure. Due to the multi-day nature of this event, spectators and participants of the Tour of Britain are more likely to book overnight accommodation and therefore may have a high spend in comparison to single-day events. This event also tends to have a high proportion of attendees coming from overseas. Overall, 2021 saw a 27% increase from 2019 (£3.3 million) in overseas economic impact.

The total spectator and participant attendance in 2021 was 265,000, with the Tour of Britain once again being responsible for nearly 80% of this figure. The attendance across all events saw a 11% decrease compared to 2019 (299,000), where the Tour of Britain again attracted the majority of attendees. This drop in attendance is likely due to impacts that the COVID-19 pandemic and the associated restrictions had on international travel to Scotland, as well as on the events industry.

In November 2020, [Scotland's Events Recovery Fund \(SERF\)](#) was established in conjunction with the Scottish Government to provide support to Scotland's events sector in delivering events as the industry adapted to the effects of the COVID-19 pandemic. Throughout 2021, 8 cycling events took place under this programme, receiving a total of £119,800 in funding.



© British Cycling, Glasgow 2021 National Track Cycling Championships

 British National Youth and Junior Track Cycling Championships 2021, Glasgow

2020 did not display a typical annual performance, generating just £240,000 in total economic impact and attracting 3,000 attendees. This is a result of the COVID-19 pandemic, which led to all major cycling events being cancelled or postponed, with the exceptions of the Strathpuffer 24 and the Dukes Weekender.

## Cycling Events in Scotland

### Cycling Events in Scotland 2019-2021

Year	Event	Programme	Audience/ Spectators	Participants/ Performers	Total attendance	Total Economic impact (£m)
2019	Mountain Bike World Cup	International	16,890	4,302	21,912	4.23
	Tour of Britain	International	155,822	120	156,362	4.50
	Tour Series- Aberdeen	International	10,000	332	10,437	0.09
	Tour Series- North Lanarkshire	International	7,000	318	7,424	0.33
	UCI Track Cycling World Cup	International	9,185	518	9,952	0.63
	Women's Tour of Scotland	International	91,000	154	91,426	0.95
2020	Strathpuffer 24	Spec Pro - Beacon	600	1,040	1,704	0.09
	The Dukes Weekender	National	1,000	532	1,628	0.15
2021	24seven	Recovery Fund	0	80	104	-
	British National Youth and Junior Track Championships	Recovery Fund	500	594	1414	-
	Electric Tweed	Spec Pro – Beacon	6,587	2,271	9,069	0.67
	Electric Tweed (Tweedlove Festival)	Recovery Fund	6,587	231	7,029	-
	Enduro World Series	International	12,640	1,250	15,000	1.31
	Etape Loch Ness	Recovery Fund	8,666	5,104	14,233	-
	HSBC UK National BMX Series	Recovery Fund	0	629	629	-
	Ride the North	Recovery Fund	0	344	345	-
	Tour of the Borders	Recovery Fund	4,625	1,927	6,669	-
	Tour of Britain	International	210,000	108	210,714	8.76
Tour Series Castle Douglas	International	2,500	270	2,875	0.05	
TweedLove Local Enduro	Recovery Fund	0	152	210	-	



# Taking a Look at Our Competitors

## Denmark

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Denmark is considered a to be one of Europe's leading cycling nations due to their world-class infrastructure, continuous investment and innovation. They are considered a key competitor to Scotland, having a similar-sized population and a comparable temperate climate. Below are some examples of best practice that make Denmark particularly stand out in terms of cycling.

### 1. Copenhagen – The Cycling City

Copenhagen is considered one of the most bike-friendly cities globally. This is mainly due an excellent network of paths that include cycle superhighways, innovative bridges and high-quality services. Thanks to the city's continuous prioritisation of cyclists and innovative long-term strategy, cycling has become one of the quickest, safest and most convenient forms of transport and is only showing signs of improvement with time. As of 2016, almost one third (29%) of all journeys across the city and 41% of commutes to work were done on a bicycle, covering a total of 1.4 million kilometres, an increase of 22% since 2006. The PLUSnet project aims to extend, maintain and improve the city's current cycle route network, making the cycling experience even more safe, comfortable and accessible by 2025.

### 2. Cycle Superhighways

In an attempt to increase interconnectivity between municipalities and decrease congestion in and around cities, 23 municipalities of Denmark's Capital Region joined forces in 2009 to design a network of inter-municipal cycle superhighways. These long routes link urban areas and workplaces across municipal borders, allowing commuters to safely and comfortably cycle to and from work daily. As of 2021, more than 9 routes have been completed or financed, with 45 completed cycle superhighway routes being the target by 2045. Once completed, the €295 million project is estimated to increase cycle trips by 6 million annually, decrease CO<sub>2</sub> emissions by 1,500 tons annually, and bring an overall cost-benefit gain of €765 million to Denmark's economy.

Denmark's impressive investment and development in cycling infrastructure has been paying off in several ways. A higher proportion of cycle trips, fewer sick days, improved traffic congestion, a decrease in road accidents, positive economic gain and reduced carbon emissions are just some of these. Denmark's successful strategy and approach to cycling is a leading example for other nations looking to make the most of the great opportunities that the cycling market has to offer.

# Taking a Look at Our Competitors

## Switzerland

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Switzerland is another world-class destination among cyclists across the globe. This is mainly due to the excellent cycle route network expanding throughout the variety of landscapes, and the extensive bike-friendly visitor infrastructure available across the country. They are also considered a main competitor to Scotland due to their similar offerings in terms of stunning geographical features. Below are some best practice examples that make Switzerland a particularly outstanding cycling destination.

### 1. A World-Class Cycling Route Network

With over 10,000 kilometres of signposted cycling routes including 9 national routes and 50 regional trails, Switzerland has one of the largest and most diverse cycling networks globally. The large variety of high quality routes are designed to make the scenic and cultural diversity of Switzerland accessible by all types of cyclists from leisure cyclists, to e-bikers, mountain bikers and touring enthusiasts. Additionally, the country's cycling network is integrated extremely well with public transport, in particularly the railway routes, allowing for efficient and easy access to and from cycling trails. In 2019, 42% of locals and visitors aged 15 and above took part in cycling, with 8% of those riding mountain bikes and 10% e-bikes. This is an overall increase of 35% in participation since 2007. In 2019 the expenditure associated with cycling tourism was around £2.5 billion.

### 2. Bike-Friendly Infrastructure and Services

Many of Switzerland's services and visitor infrastructures are extremely bicycle friendly, and often designed specifically with the cyclist in mind. The country's 29,000 kilometre-long interconnected railway, bus and boat route network allows visitors to access outdoor adventures easily as well as transport cycling equipment in specialised carriages and bike racks. Flexible long and short-term bike rental options also allow all types of riders to easily combine cycling and public transport according to their needs. [Swiss Bike Hotels](#) cater specifically to anyone looking to spend some time on two wheels, whether that's road cycling, mountain biking or leisure cycling. These hotels meet certain criteria and offer services that ensure visitors can enjoy a care-free and quality cycling holiday. Ski resorts also often utilise their infrastructure for [mountain biking](#) during the summer, offering visitors a high quality experience even when there's no snow on the ground.

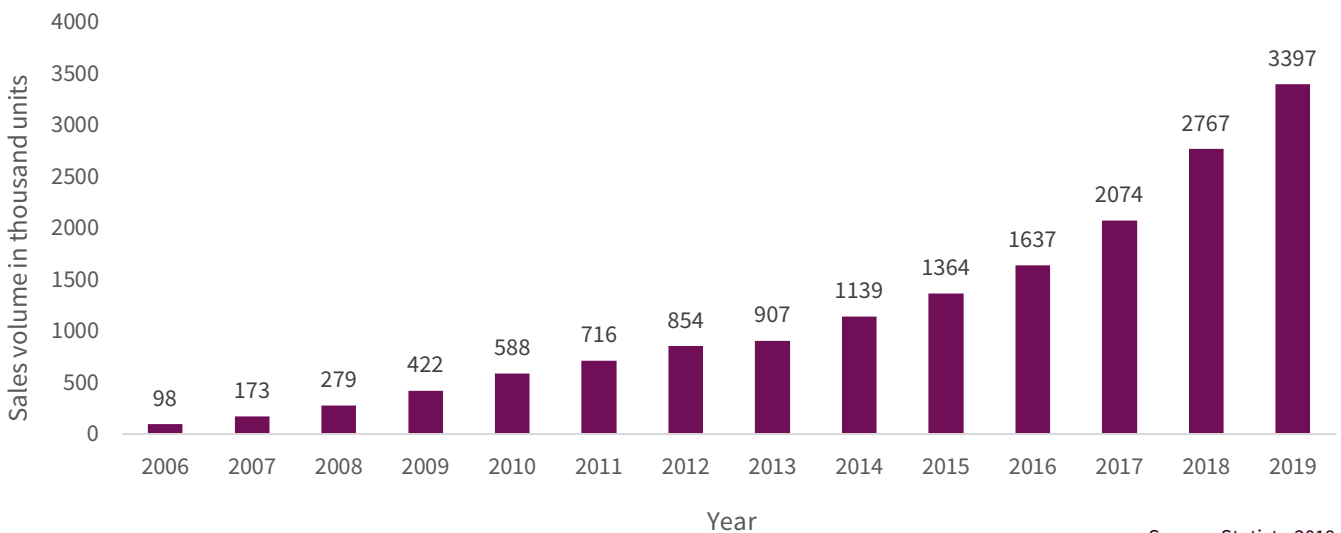
Switzerland sets an excellent example of how infrastructure and services can be integrated and designed to benefit the cyclist. In combination with a world-class route network, cycling in Switzerland has become more than just an activity for both visitors and locals. This is reflected by increasing participation in cycling and the £2.5 billion valuation of cycling tourism in the country.

## Trends

### E-bikes / Electric Mountain bikes

An electric bicycle or an e-bike is a bicycle with an integrated electric motor that assists the user with pedalling. E-bikes come in many different types and enhance what can be achieved on a regular bicycle, whether for daily commuting, leisure riding, touring or mountain biking. These power-assisted bicycles have seen a surge in popularity in recent years, with sales across Europe surpassing 3.3 million units in 2019. E-bikes have been and continue to attract users who may otherwise choose not to cycle, for instance those with a disability or those who struggle with difficult terrains such as steep hills, as well as current cyclists and mountain bikers looking to experience a fun alternative to their regular ride.

#### Number of electric bicycles sold in Europe annually



With the E-bike craze rapidly spreading across major markets such as the Asia-Pacific region and Europe, market research conducted by Deloitte predicts that the global E-bike market value will surpass £40 billion by 2027, doubling from 2021. This boom in popularity will undoubtedly present great opportunity for cycling tourism in Scotland as cycling will become even more accessible and attractive to a greater proportion of visitors.

There are a number of public e-bike hire schemes that have launched across Scotland. These include Bike Bute, Forth Bike, Hi-Bike (Highlands), Ride On Dundee and Nextbike (Glasgow and Sterling).



 An e-bike by Bike Bute, Isle of Bute

## Trends

### Gravel Biking

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Gravel biking or gravel riding is a form of adventure cycling that takes place on a variety of surfaces such as road sections and looser off-road trails, fitting somewhere in between road cycling and mountain biking. This relatively new category of cycling has seen a large rise in popularity due to the opportunity for cyclists to explore a path less travelled, away from busy roads and traffic. Advances in bicycle technology have made gravel biking much easier, safer and more comfortable, with manufacturers now making bikes specifically designed for this type of riding.

There are already several notable gravel biking routes of varying lengths and difficulties across Scotland, including routes around Aberfoyle, Highland Perthshire, Argyll, Dumfries & Galloway and Aberdeenshire. These allow both leisure cyclists as well as more experienced riders to discover Scotland through wilder territories and paths less travelled.

Although gravel riding has mostly been a recreational form of cycling in the past, large scale gravel riding events are becoming increasingly common in Scotland and across the globe. Events such as the Dukes Weekender, Raiders Gravel, Gritopia and Muck n' Mac Fest are just some of the events that bring together gravel enthusiasts from across Scotland and beyond, helping to further establish and grow this category of cycling.



© Warren Sanders, Galloway Cycling Holidays



Gravel biking from Clatteringshaws to GlenTrool, Dumfries & Galloway

## Trends

### Bikepacking

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Bikepacking is a term that refers to taking multi-day self-supported adventures with a bicycle along various terrains and across remote areas, and is often associated with gravel biking. Bikepackers often choose camping as their form of accommodation, giving them the freedom to pitch a tent and spend the night at any point along their route. Although multi-day touring on a bicycle is not necessarily something new, bikepacking as we know it today is becoming increasingly popular, having come a long way in recent years largely due to the rapid advancement of bicycle technology and availability of lightweight equipment.

Scotland has recently started to offer and promote a number of bikepacking routes and organised events, including a 496-kilometre route connecting the Argyll islands and the islands of Mull, Jura, Islay and Bute. Commissioned by Wild About Argyll and Caledonian MacBrayne, the route can easily be accessed from Glasgow city centre, combining the use of several types of transport such as train, ferry as well as cycling. Bikepackers can experience the natural beauty and numerous attractions that the route has to offer, such as stunning beaches, world-class distilleries, local dining experiences and scenic gravel tracks. Also taking place along a 132-kilometre section of this route, is the annual weekend-long bikepacking event known as the Dunoon Dirt Dash. Bringing together adventure seekers from across Scotland, events such as this help in the promotion of new long-distance gravel routes and bring attention to the new and exciting concept of bikepacking.

There is no doubt that the dramatic landscapes, the wide range of existing routes, and the Land Reform (Scotland) 2003 Act and [Scottish Outdoor Access Code](#) that provides visitors the right of responsible access to most land and water, make Scotland a world-class destination for an activity such as bikepacking. Despite being an upcoming trend, bikepacking will certainly offer an increasing amount of opportunities to the tourism industry as it's popularity continues to grow.



 Exploring Glen Lonan, on The Caledonia Way

## Trends

### Packrafting


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Packrafting refers to the use of an inflatable reinforced raft that can be carried on a bike during long journeys and adventures, enabling cyclists to cross any water obstacles they may come across. A packraft allows cyclists to paddle on all kinds of waterways such as rivers and lochs along with their bike and bikepacking bags.

Packrafting is part of a wider form of adventure travel known as Pedaddling - a mix of pedalling and paddling. A concept recently developed and promoted by Argyll & the Isles Tourism Co-operative, Pedaddling is a fun and adventurous way to explore over 3750 kilometres of coastline, 23 inhabited islands and 40 lochs along Scotland's Adventure Coast. In combination with the UK's first active travel train, ScotRail's Highland Explorer, lovers of the great outdoors and adventure seekers are able to travel in a sustainable manner, keeping their carbon footprint to a minimum.

Although a relatively new trend within the cycling and adventure travel market, Pedaddling and Packrafting may open up opportunities for businesses to offer relevant services and equipment to visitors as these unique and exciting concepts become more popular over time.



 Packrafting Loch Tulla at Bridge of Orchy

## Appendix 1 Sources and their interpretation

The following sources were used in the development of this Topic Paper:

Deloitte, Discover the Future Report 2021  
EventScotland 2021  
Frontline Ltd, Estimating the holistic value of Scotland's Mountain Bike Sector, 2016  
Great Britain Day Visitor Survey 2019  
Great Britain Tourism Survey 2019  
Office for National Statistics, Consumer Trends 2020  
Statista Global Consumer Survey 2021  
Sustrans Bike Life Report 2019  
TransportScotland Statistics 2019  
Visitor Survey 2016  
VisitScotland Google Analytics 2021

**Analysis of sub-groups** – such as trips by purpose or demographic group – relies on small sample sizes that can be unreliable. Where this is a particular issue, methods to aggregate data, such as using a multi-year average instead of single-year data, have been employed. Before using the data, it is important to recognise the limitations of using a small sample size.

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The Pilgrim Way, Fife

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**CONTACT US**  
**Insight Department**  
VisitScotland  
Ocean Point One  
94 Ocean Drive  
Edinburgh EH6 6JH  
**0131 472 2222**

[research@visitscotland.com](mailto:research@visitscotland.com)

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