

Latest trends and data on cycling tourism

Round-Table

6 March 2024
ITB Berlin



ECF gratefully acknowledges financial support from the LIFE Programme of the European Union



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[EuroVelo.com](https://www.eurovelo.com)

Latest trends and data on cycling tourism

Our speakers:

Christian Tänzler
Allgemeiner Deutscher
Farrhad Club-ADFC
(Germany)

Heiko Riekenberg
Bikemap / CycleSummit

Russell Walters
Adventure Travel Trade
Association-ATTA

Agathe Daudibon
ECF

Moderator: Jessica Casagrande, ECF



ADFC-Radreiseanalyse 2024

ADFC Bicycle Travel Analysis- for the 2023 cycling year



A broader view on cycling tourism

Cycling trips | 3 nights +
Main motive of the holiday:
cycling



Cycling trips | 1-2 nights
Main motive of the holiday:
cycling

New



No cycling trip
No cycling trip in 2023/ the
last three years

New



Cycling on holiday
Other activities as main
motive, but regular use of
bicycles during the trip

New



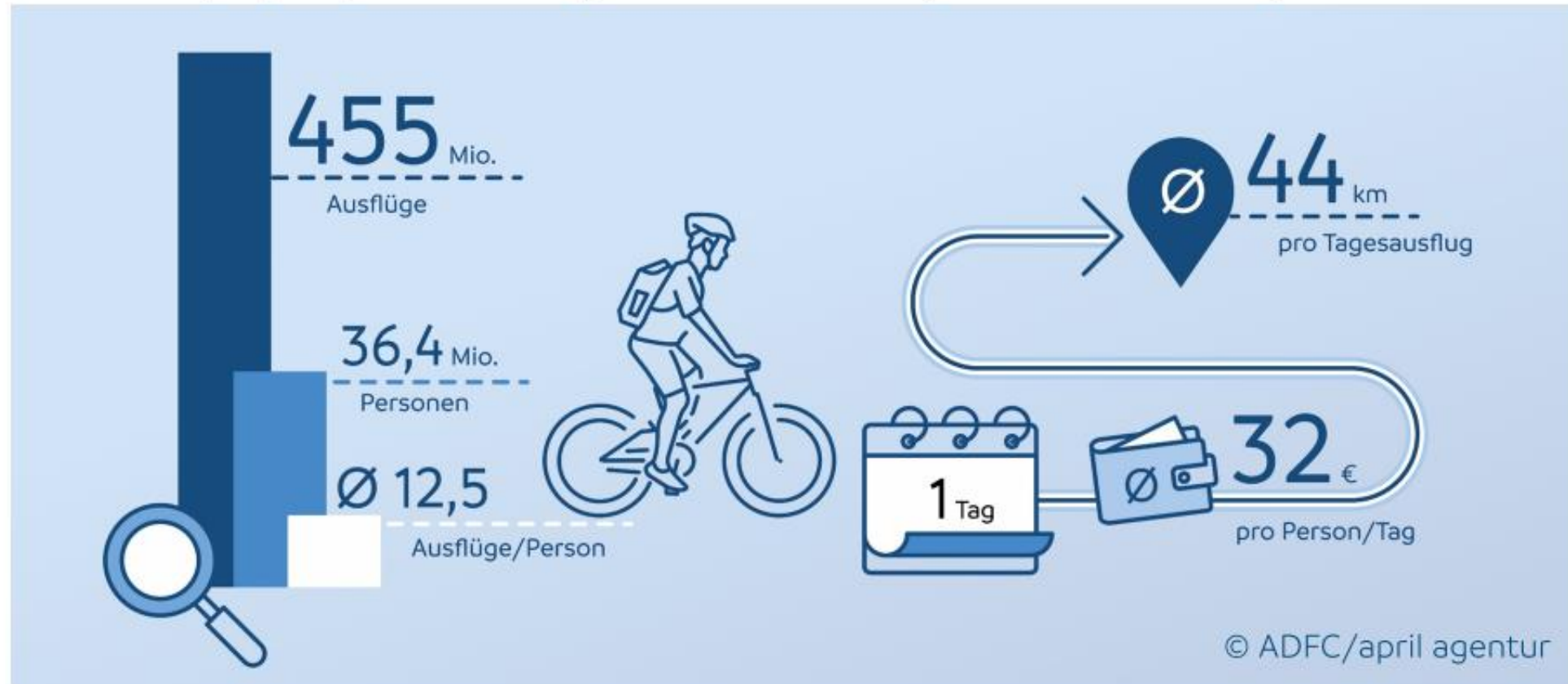
Day Trips
Day trips by bike
Not during the holidays





Increasing number of day trips

- 455 million day trips
- 36.4 million day trippers
- 12.5 trips per person and year
- On average 44 km covered
- Spendings of 32 € per person and day (excl. travel costs)



© ADFC/april agentur

New data: cycling on holiday



- 29 million people in the last 3 years
- 10.6 million people in 2023
- Average of 9.8 overnight stays
- Bicycle was used on 6 days on average during the holiday
- Spendings of 123 € per person/day (incl. travel costs per day)



© ADFC/april agentur

New data: short trips by bike

- 7 million short trips in 2023
- 5 million people in 2023
- Average of 1.8 overnight stays
- Distance covered: 61.8 km/day
- Spendings of 130 € per person/day (incl. travel costs per day)



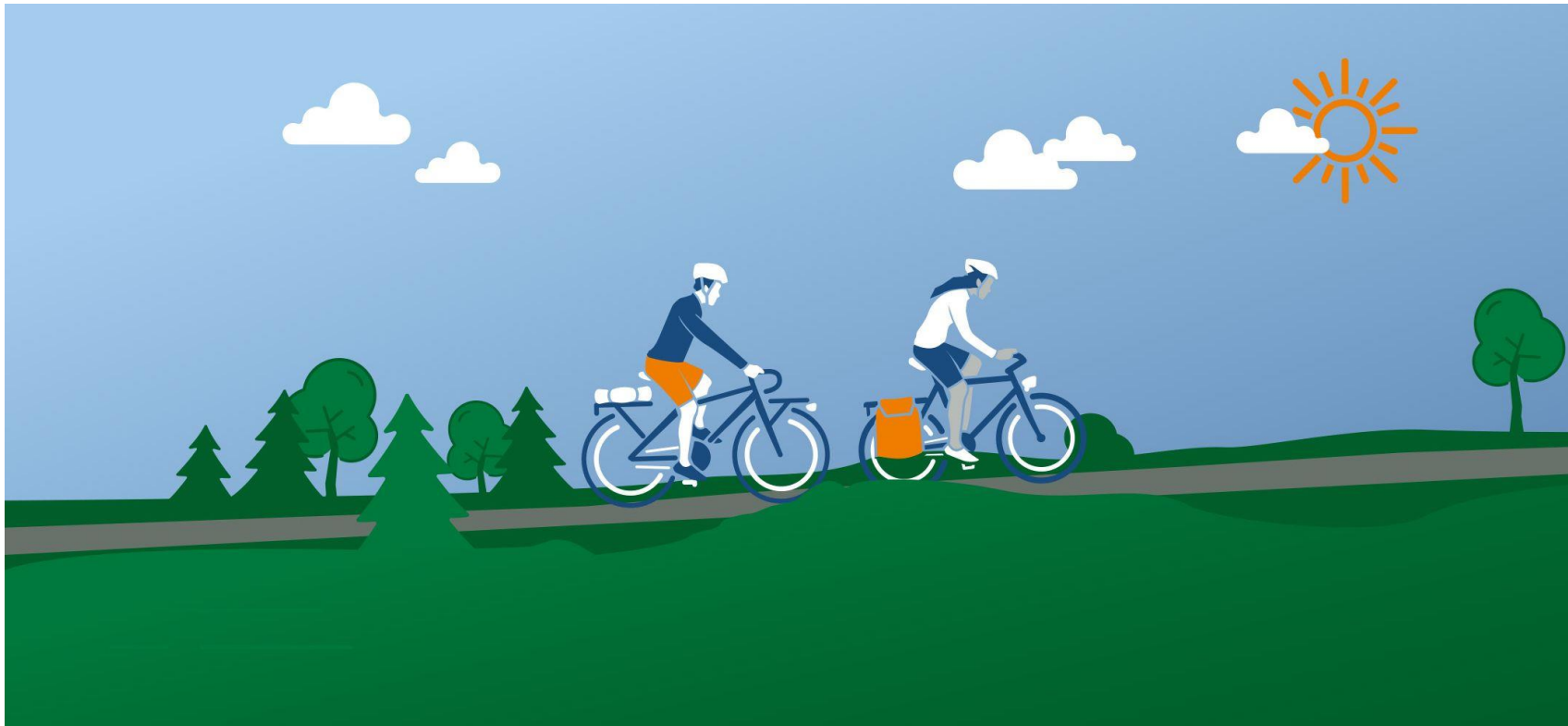
Less cycling trips in 2023 with 3 nights +



- 5.5 million cycling trips in 2023
- 3.6 million people in 2023
- Average of 7.6 overnight stays
- Distance covered: 64.7 km/day
- Spendings of 117 € per person/day (incl. travel costs per day)



37.7 million: more than half of Germany's adult population cycled during their holidays or day trips in 2023.



ADFC Cycling Tourism Team



Christian Tänzler
Board Member - Tourism



Till Palme
Head of tourism department
| ADFC head office



Annemarie Zirkel
Project manager tourism |
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Tourism officer | ADFC head
office



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Get in touch: tourismus@adfc.de

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- Annual Event connecting 120 cycle tour operators from 30 countries worldwide
- Established 2009
- 4 days for **networking** and incoming / outgoing business





According to our data (source: cycle tour operators)

1. Youth
2. Low budget
3. Domestic & sustainable bike holidays
4. Gravel Biking





ADVENTURE TRAVEL
TRADE ASSOCIATION



Cycling Tour Operators | Survey 2024



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Centralising available data in one place

1st pillar: Usage from **bicycle counters**

2nd pillar: EuroVelo developments from **national GIS data**

3rd pillar: Digital statistics from **EuroVelo channels**

4th pillar (tomorrow): **Cycling Tour Operators survey**

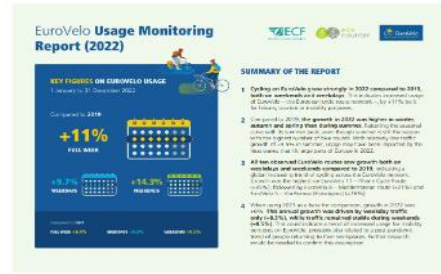


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Usage monitoring

Data provided by [Eco-Counter](#)

Read the [latest report \(2022\)](#)



+11% usage evolution (2019-2022)

Top EuroVelo routes

CYCLING TRAFFIC CHANGE 2022 VS 2019



Route development

Read the [latest report \(2023\)](#)



92,000+ km

total length of the EuroVelo network (as of 2023)

66% (60,000+ km)

of the EuroVelo network is ready to cycle (as of 2023)

Digital statistics

Read the [latest report \(2022\)](#)



1.8M+

web visitors in 2022

74,000+

social media followers in 2022



EuroVelo 15

most popular route in 2022

NEW REPORT:

“increased usage of EuroVelo be it for leisure, tourism or mobility purposes”

EuroVelo Usage Monitoring Report (2023)

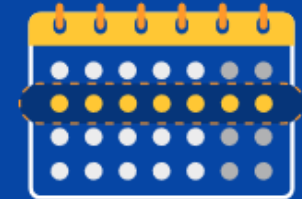


KEY FIGURES ON EUROVELO USAGE

1 January to 31 December 2023

Compared to 2019

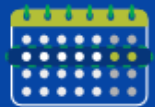
+9.8%
FULL WEEK



+11.3%
WEEKDAYS



+9.2%
WEEKENDS



Compared to 2022

FULL WEEK -1%

WEEKDAYS -1.6%

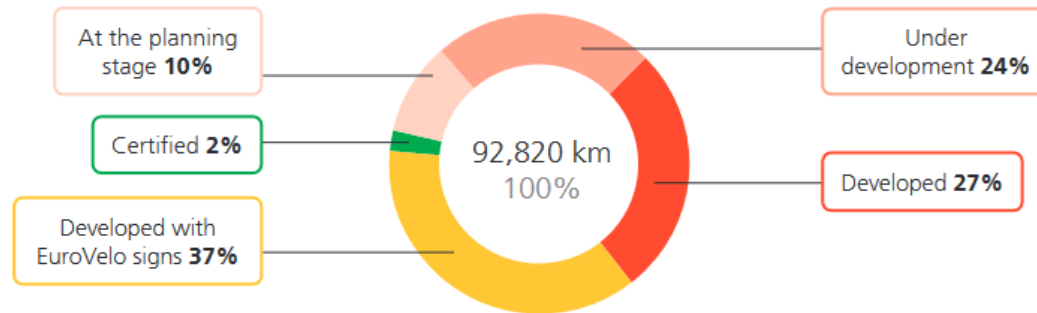
WEEKENDS -0.8%



EuroVelo Development Status Report (2023)

- **92,000+** km in total
- **66%** of EuroVelo is ready to cycle
- **37%** with EuroVelo signs

DEVELOPMENT STATUS DISTRIBUTION ON EUROVELO



DEVELOPMENT SECTIONS OF THE EUROVELO NETWORK IN 2023



NEW REPORT:

“Various EuroVelo channels with increased community engagement”

EuroVelo Digital Statistics Report (2023)



EUROVELO FOR USERS*

2 594 967
web sessions **+28%**

1 537 088
web visitors **-15%**

+20.7%
clicks through **Google search** (compared to 2022)

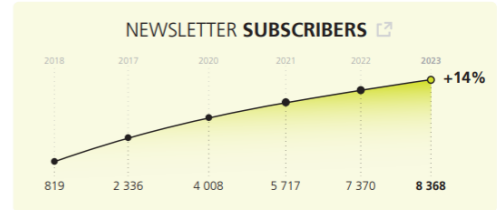
40.1%
record **click rate** for monthly newsletter in February 2023

SOCIAL MEDIA FOLLOWERS

- f 51 900+** **+7% GROWTH**
- t 11 800+** **+5% GROWTH**
- i 22 300+** **+52% GROWTH**

EUROVELO FOR USERS*

- 58%** **+5%** mobile web visitors
- 4m4s** **+37s** average session time per visitor
- 40%** **+0%** of web visitors are female

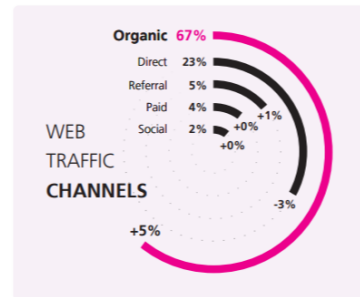
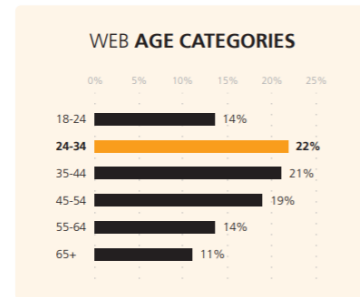


EUROVELO FOR PROFESSIONALS*

57 498
pro web visitors **+302%**

48% **+2%**
pro web mobile usage

2m28s
pro web avg. session **+34s**



GPX TRACKS DOWNLOADS

340 800+ **+124%** from Jul-Dec 2023 (the download feature was introduced in July 2022)

20% FULL ROUTE **80% DEVELOPED PARTS ONLY**

29 800+ **+55% GROWTH**
members on Facebook discussion group

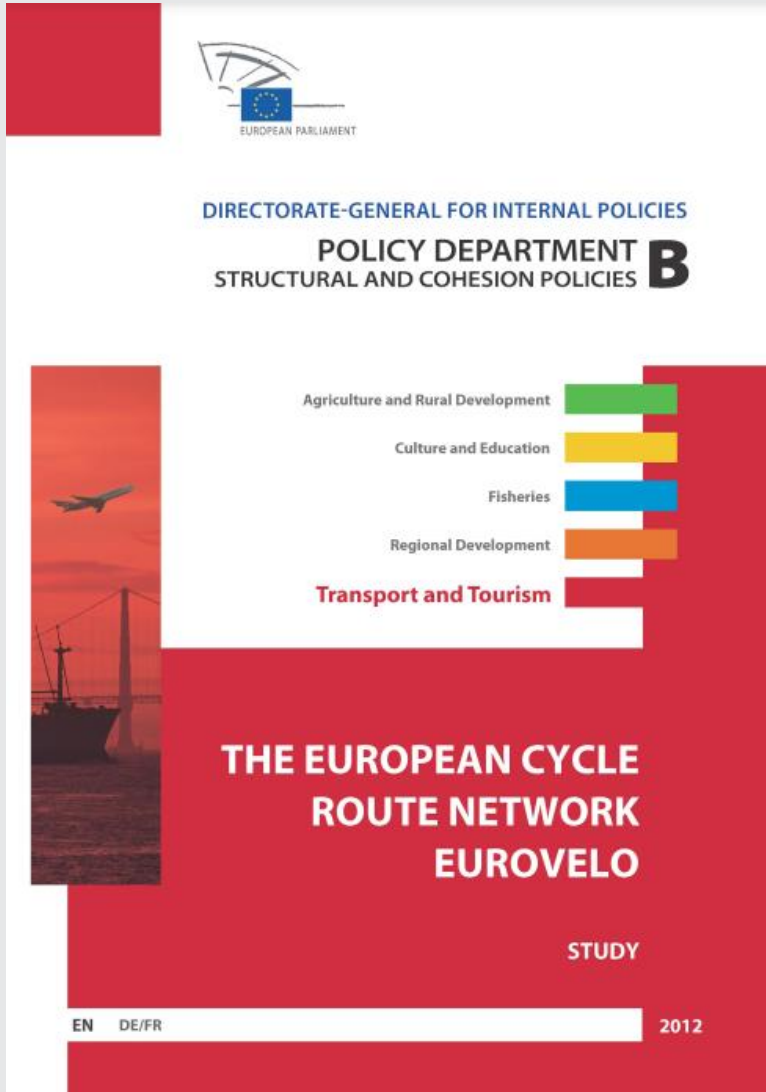
EuroVelo route and country with most web visits

- EuroVelo 8 Mediterranean Route
- France

FULL ROUTE AND COUNTRY STATISTICS CAN BE FOUND ON PAGES 2-4 →



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EuroVelo Data Hub

Economic impact estimations:



Europe (2012): €44 billion economic impact a year

- Germany (2009): **€9.2 billion** economic impact a year
- Italy (2019): **€4 billion** economic impact estimated a year
- The Netherlands (2021): **€1 billion** economic impact from Dutch in the NL
- France (2019): **€4.2 billion** direct economic impact estimated a year
- France-La Loire à Vélo-900km section of EuroVelo 6 (2023): **€0.5 billion** economic impact a year



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Conclusions

- **Cycling tourism offers:** new infrastructures, services, communication solutions, etc.
- Cycling tourism interest and visibility is growing – **large potential for growth!**
- **But we need more data** on the usage and economic impact to boost it even more!



Take the ferry to cross the Meuse River on EuroVelo 19 – ©EuroVelo Belgium

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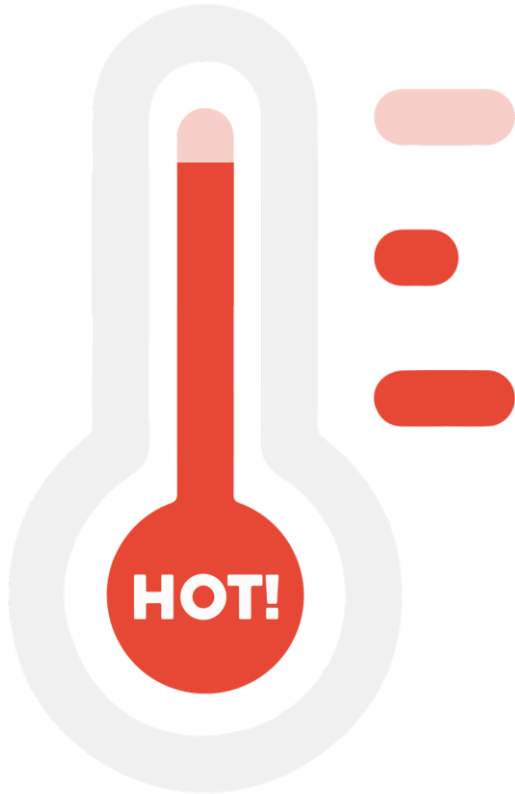
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“HOT” TRENDING ADVENTURE ACTIVITIES



1. Hiking/Trekking/Walking



2. Cultural



3. Culinary/Gastronomy



4. Cycling (mountain/
non-paved surface)



5. Safaris/wildlife viewing



6. Wellness-focused activities



7. Cycling (electric bikes)



8. Cycling (road/paved surface)



9. Photography (wildlife/nature)



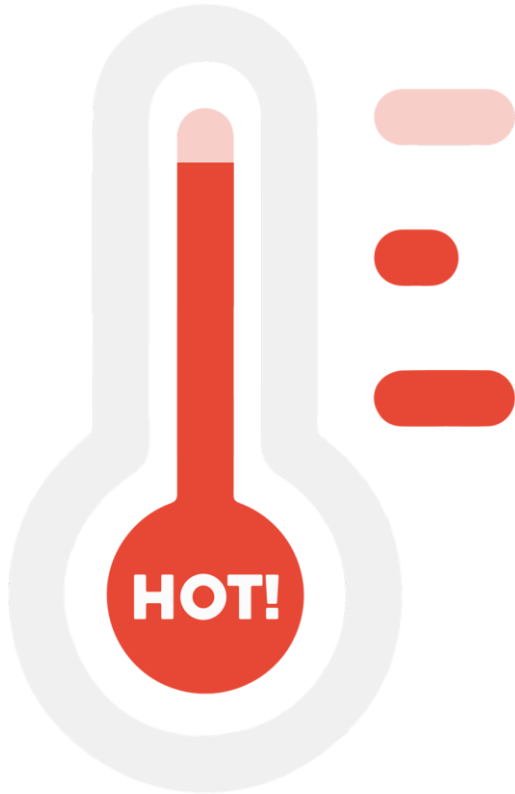
10. Birdwatching (NEW in top 10)

Q: What is your organization's perception of adventure travel activity trends, based on consumer demand and bookings in 2022 and going into 2023?

Base: All respondents excluding those left blank (n=120)

Source: 2023 Adventure Tour Operator Snapshot Survey

“HOT” TRENDING HIGH-DEMAND TRIPS



1. Custom Itineraries



2. Remote Destinations/Trails



3. Expert or Specialist-Guided Trips



4. Slow Travel Itineraries



5. Greener/Sustainable/Low Impact Itineraries



6. Solo Travelers (NEW in top 10)



7. Family/Multi-Generation



8. Off-Peak Travel (NEW in top 10)



9. Longer-Duration (NEW in top 10)



10. Domestic/Regional Travel

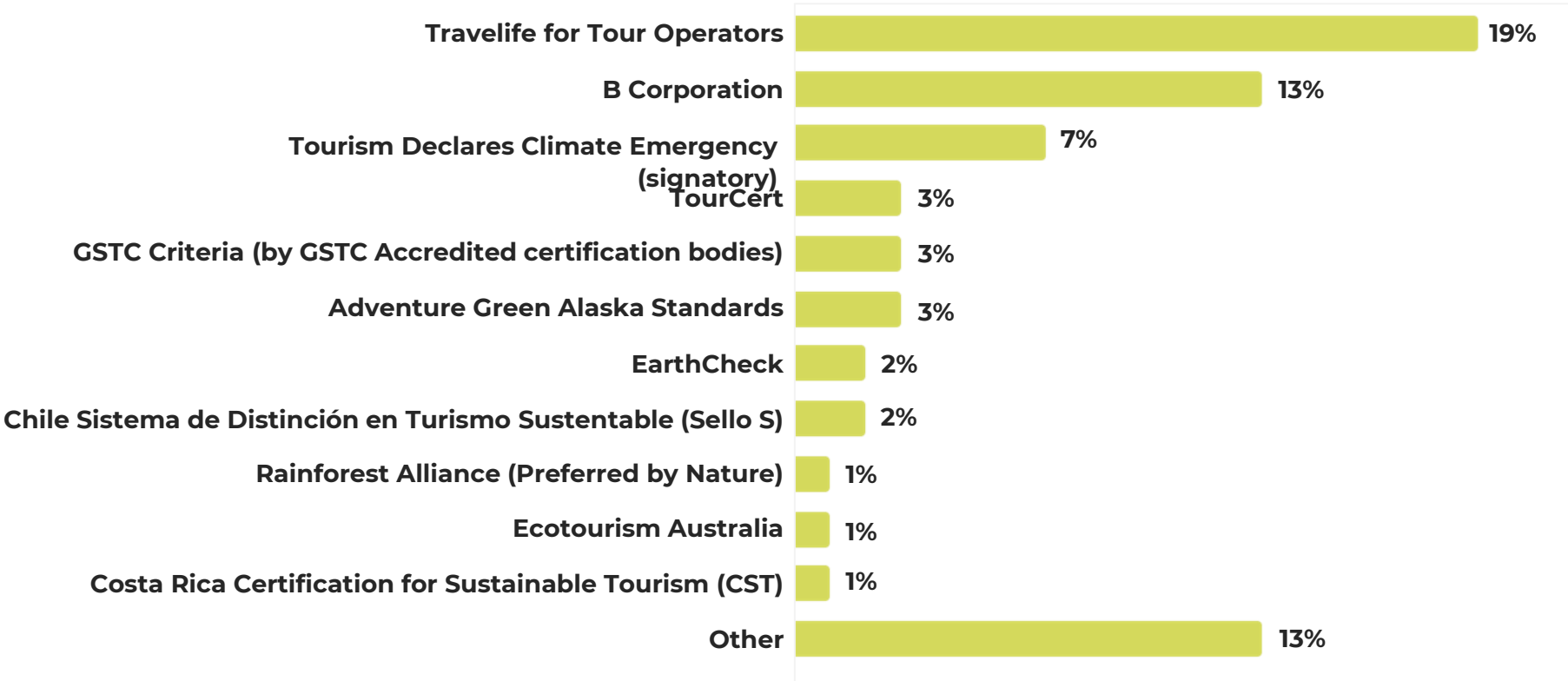
Q: What is your organization's perception of the following itinerary trends based on consumer demand and bookings throughout 2022?

Base: All respondents excluding those left blank (n=133)

Source: 2023 Adventure Tour Operator Snapshot Survey



SUSTAINABILITY CERTIFICATION



68%

(up from **45%** in 2021)

have or are working toward a sustainability certification

Q: Does your business currently hold (or are you working to acquire) any kind of sustainability certification? (check all that apply.)

Base: All respondents excluding those left blank (n=110)

Source: 2023 Adventure Tour Operator Snapshot Survey



2022 MOST POPULAR ADVENTURE TRIP SPEND

76%

of the \$3,000 total trip cost is
spent with local suppliers
(up from 65%-70% in recent years)

=

\$2,280

per trip is spent with
local suppliers (USD)

+

\$189

average spend per guest on
local handicrafts or souvenirs

Q: Still thinking of this popular 2022 itinerary, please estimate the percentage of your trip cost spent with local suppliers based in the host market. Please only estimate your spend with suppliers from the host market, and exclude all trip expenditure with suppliers based in other nations, trip margin, and your trip operating costs.

Q: If you can, please estimate what your average guest spends on local handicrafts or souvenirs on this popular trip in the host destination.

Base: All buyer respondents excluding those left blank (n=68)

Source: 2023 Adventure Tour Operator Snapshot Survey

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Thank you!

Do you have any questions?
eurovelo@ecf.com

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Tips and tools to make your cycling tourism offer a quality one

Keynote

6 March 2024
ITB Berlin

Alexandra Fournier



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[EuroVelo.com](https://www.eurovelo.com)

Quality – answering the first needs of cyclists

- Users need quality cycle routes to get started
- **Safety** as a primary need to fulfil with cycling infrastructure
- Different solutions to approach cycle route quality
- **‘European Certification Standard’** is ECF’s methodology to address the quality of **EuroVelo and long-distance cycle routes** in general



EuroVelo, the European cycle route network (2023)

The European Certification Standard – a ready-to-use tool



Objective: match European users' expectations and identify the level of development



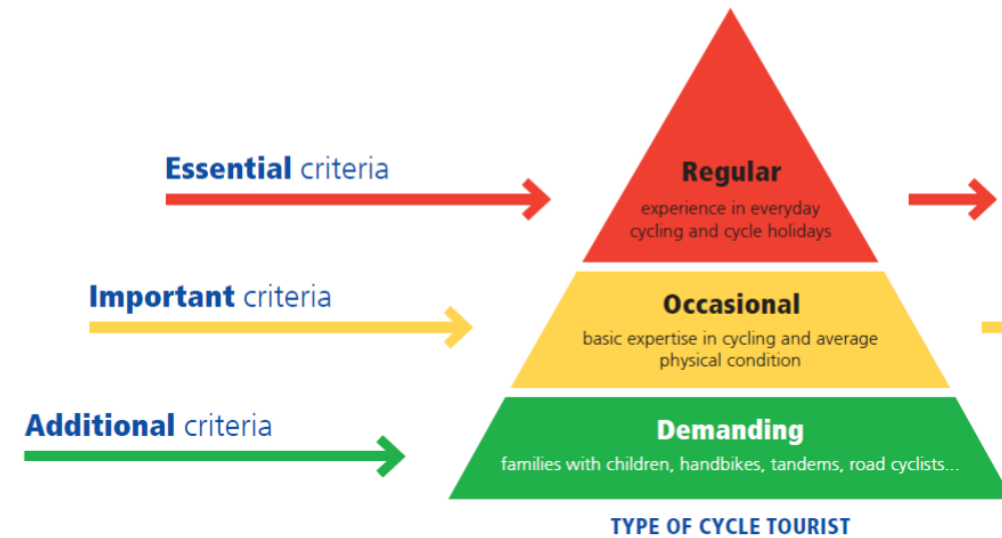
Three target groups of users



Double use:

- **Survey** – a methodology to assess the deficiencies and investments for improvements
- **Certification** – a label to market EuroVelo routes as a high-quality cycling route

Picture: Colmar, France along the certified EuroVelo 15 – Rhine Cycle Route © DEMARRAGE project



Three pillars of quality – the criteria categories of ECS



Route infrastructure

- Continuity
- Route components (public road, painted cycle lane, cycle path, greenway, cycle street, agricultural management road)
- Surface and width
- Gradients
- Attractiveness
- Signing
- Public transport

Road safety



Services

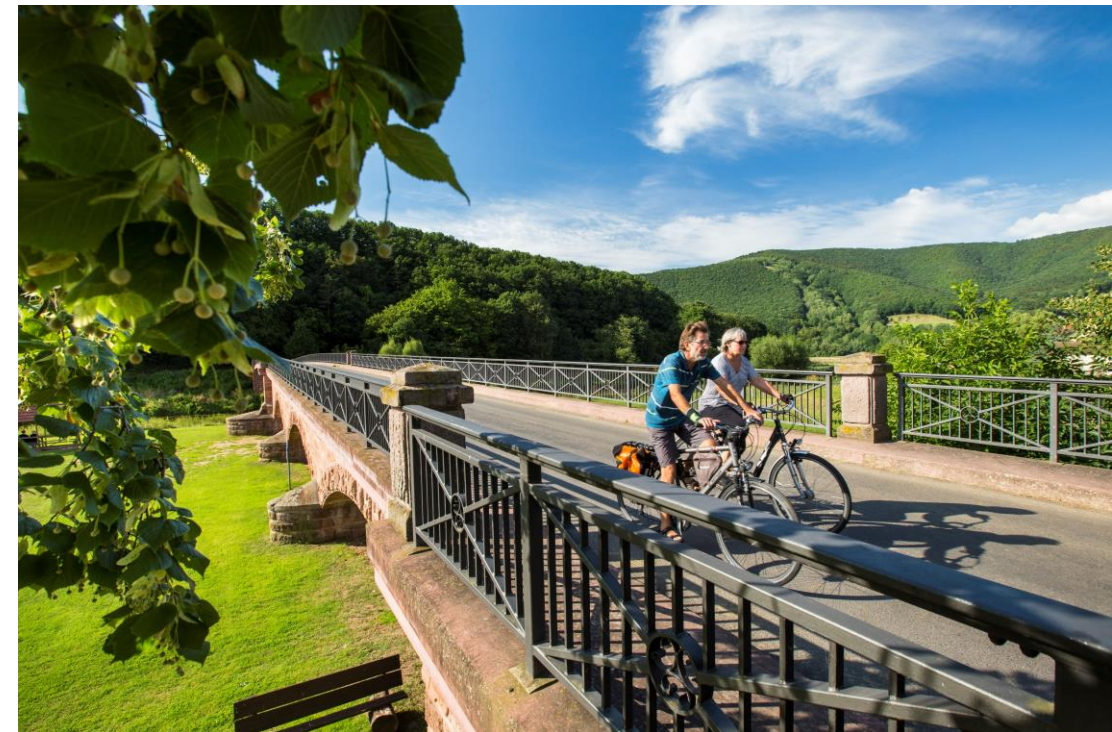
- Accommodation
- Food, drink and rest areas
- Bike repair and bike shops
- Other services
- Bookable offers



Promotion & Marketing

- Web communication
- Print communication
- Other promotion and information tools

I – High-quality and safe infrastructure



EuroVelo 13 – Iron Curtain Trail © EuroVelo

II – Qualitative services

- Accommodations:
 - One-night stays available
 - A variety of types to meet different needs
 - Safe bike storage
 - One-way bike rental
 - Luggage transfer
 - Rest areas
 - Drinkable water and toilets
- **Essential to the development of successful cycling tourism products**
- **Developments within the ICTr (EuroVelo 13 – Iron Curtain Trail) and Biking Baltic Upgrade (EuroVelo 10 – Baltic Sea Cycle Route) Interreg projects**



Bay of Puck, Poland, along EuroVelo 10 – Baltic Sea Cycle Route and EuroVelo 13 – Iron Curtain Trail © Pomorskie.travel

Zoom on cycling-friendly schemes

Different systems adapted to national and/or regional needs: 28 on [EuroVelo.com/cycling-friendly-schemes](https://www.eurovelo.com/cycling-friendly-schemes)

A useful tool to guide cycling tourists to service providers that will fulfil their specific needs: safe and secured bike parking, repair tools, information, washing and drying facilities, possibility to recharge e-bike batteries and other electronic devices, etc.

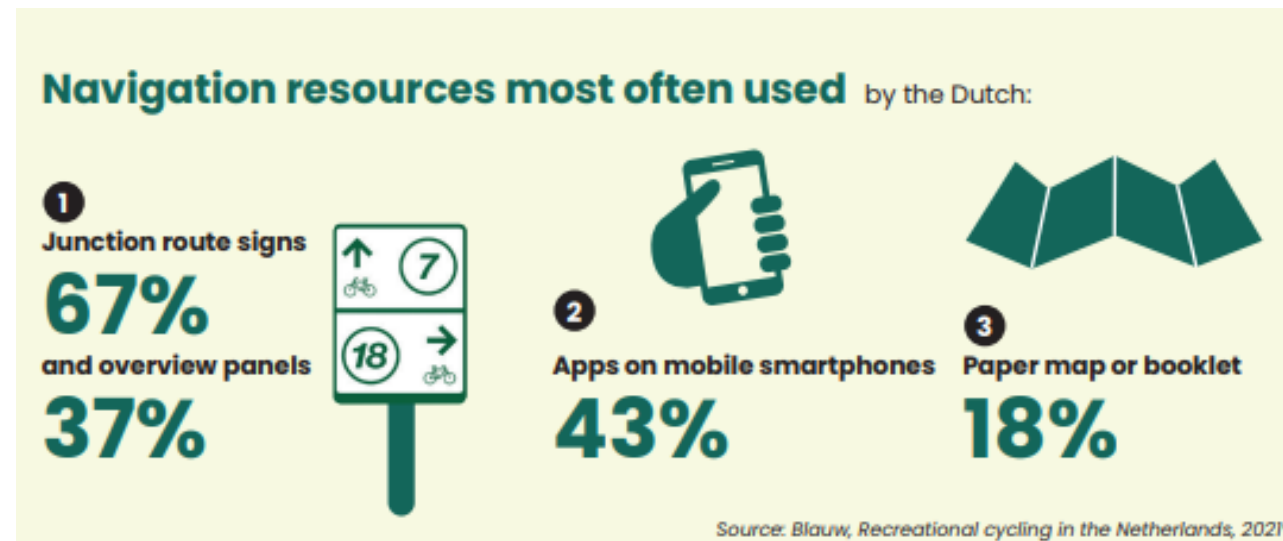


ADDITIONAL CRITERION: At least some accommodation available on the daily section are certified as cyclist-friendly.



III – Quality of information available: marketing & promotion

- Cycling tourists are **multimedia users** to prepare and orient themselves.
- **Printed materials** (maps, guidebooks, etc) are still relevant and important.
- **Signing** is still the most used navigation resource.

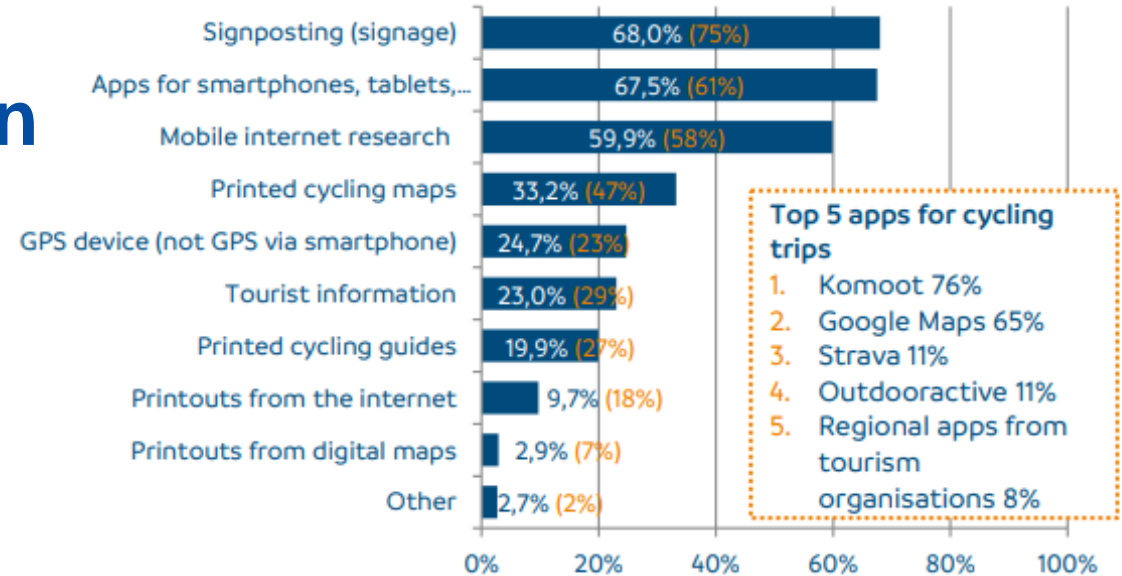


III – Quality of information available: marketing & promotion

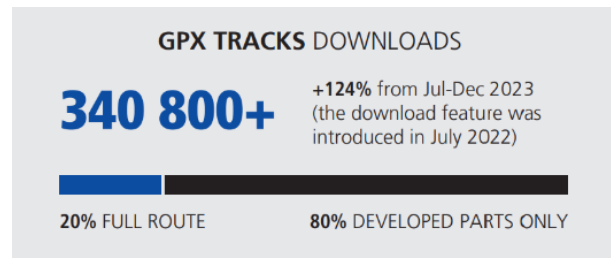
Digital information:

- **EuroVelo.com** as a centralised platform redirecting to national and regional websites
- Importance of availability of **GPX downloads**
- Large use of **apps**

During cycling trips Which sources of information and media did you use during your cycling trips, e.g. for orientation?
(Only cycle tourists; n=10,055)



ADFC bicycle travel analysis 2023



Who can develop a high-quality cycling product?



Private stakeholders:

- development of itineraries using the existing cycling routes,
- creation of new services/offers with cycling-friendly certification,
- marketing and communication online, printed and ads.



Public stakeholders:

- development and maintenance of the cycle routes and,
- services such as rest areas, drinking fountains, but also luggage transport (Luxembourg example), public transport, etc.
- information on the route (boards, signs), marketing and communication online and on printed material (flyers, etc)



Liège, Belgium, along EuroVelo 19 – Meuse Cycle Route © EuroVelo



“Cycling through History and Art” programme © Cities for Cycling, Greece

Tips and tools to make your cycling tourism offer a quality one

Thank you!

Do you have any questions?

Alexandra Fournier

EuroVelo & Projects Coordinator

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Digital tools to help businesses and destinations attract pedal-powered tourists

EuroVelo.com

6 March 2024
ITB Berlin



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Digital tools to help businesses and destinations attract pedal-powered tourists

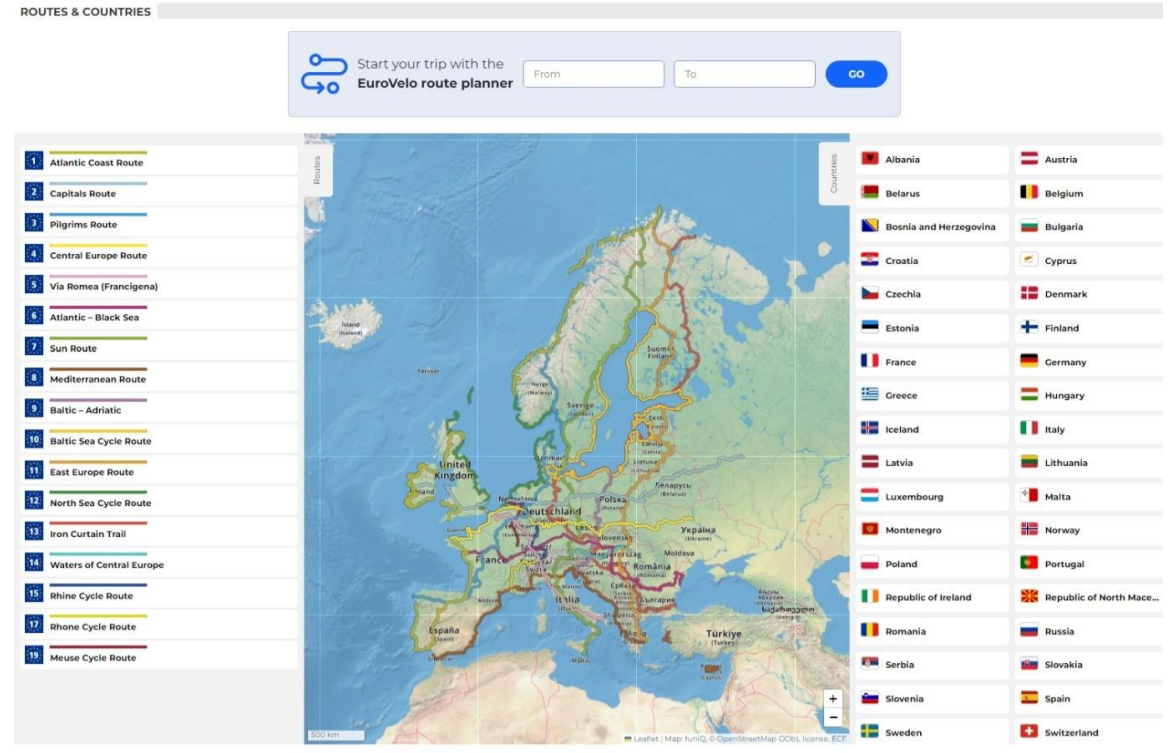
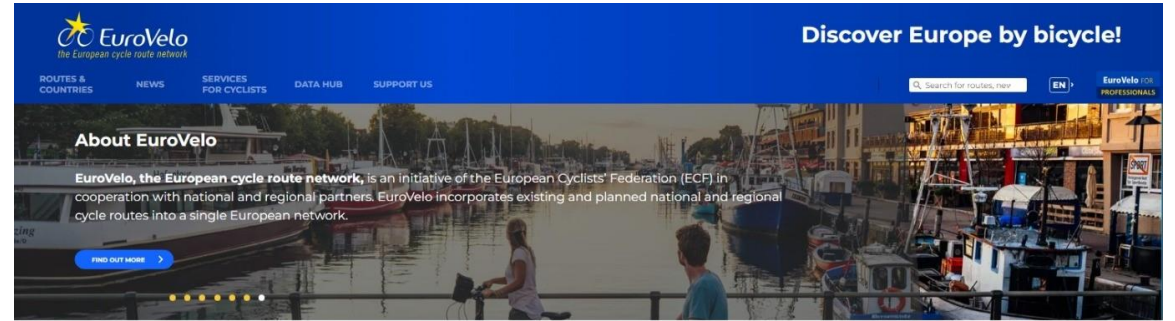
The EuroVelo.com portal

Hub for cycling tourism in Europe:

- Route destinations
- Country destinations

1,5 million visitors in 2023

+25% page views in 2023



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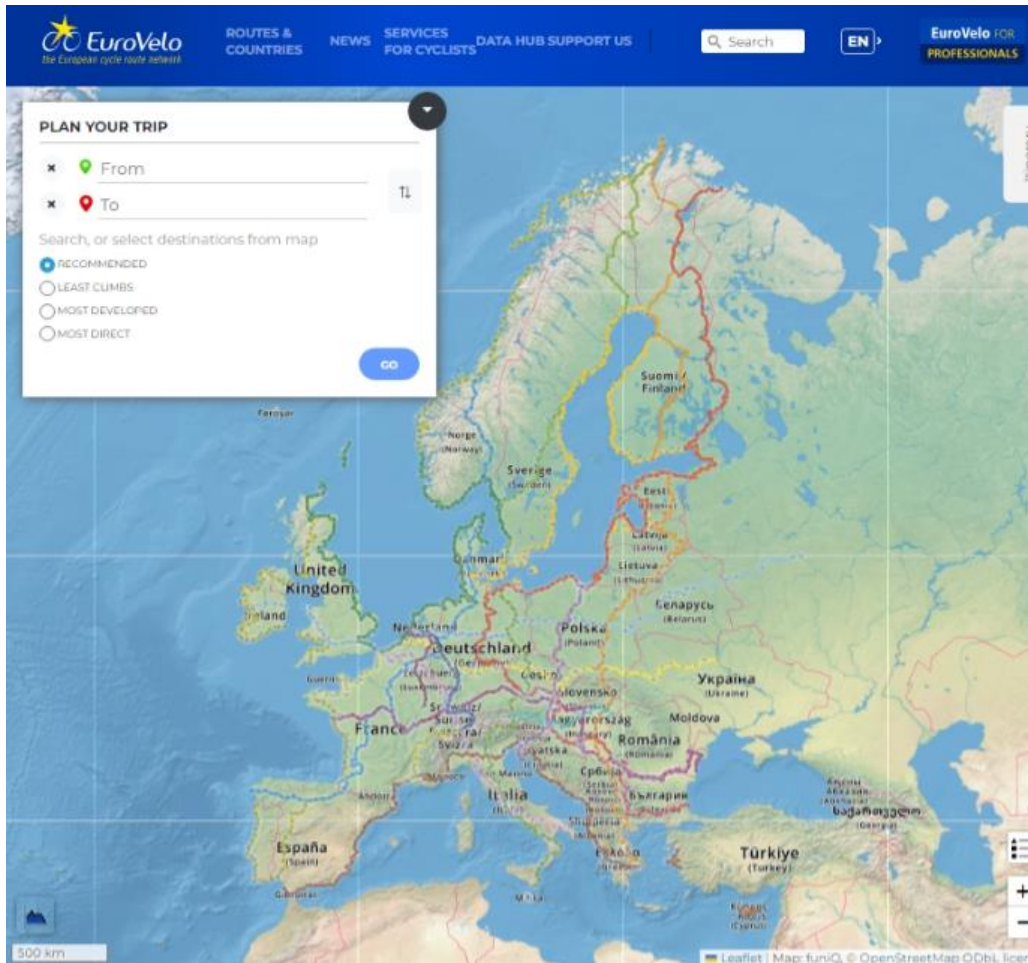


Start your trip with the
EuroVelo route planner

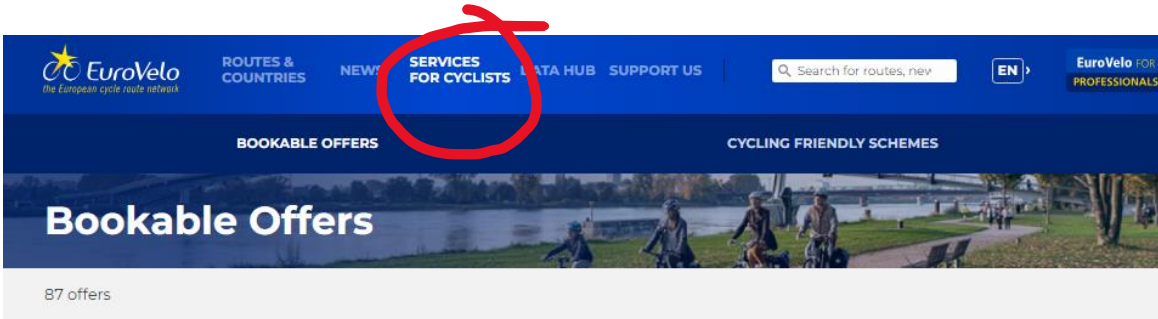
Digital tools to help businesses and destinations attract pedal-powered tourists

The EuroVelo.com portal

Interactive map + NEW route planner



ECF gratefully acknowledges financial support from the LIFE Programme of the European Union



Digital tools to help businesses and destinations attract pedal-powered tourists

Bookable offers on EuroVelo.com

An international spotlight for your cycling tourism offer!

3 languages (EN, FR, DE)

Filter selection and tailoring

- COUNTRIES**
- AUSTRIA
 - BELGIUM
 - CROATIA
 - CZECH REPUBLIC
 - DENMARK
 - ESTONIA
 - FINLAND
 - FRANCE
 - GERMANY
 - HUNGARY
 - IRELAND
 - ITALY
 - LATVIA
 - LITHUANIA
 - NETHERLANDS
 - POLAND
 - PORTUGAL
 - ROMANIA
 - SLOVAKIA
 - SLOVENIA
 - SPAIN
 - SWITZERLAND

- ROUTES**
- EUROVELO 1
 - EUROVELO 2
 - EUROVELO 3
 - EUROVELO 4
 - EUROVELO 5
 - EUROVELO 6
 - EUROVELO 7
 - EUROVELO 8
 - EUROVELO 10
 - EUROVELO 11

FRANCE

The Loire Valley Castles by Bike

FROM	649 €
DURATION	7 days
DIFFICULTY	Easy
ELEVATION	Flat
TOUR TYPE	Self-guided
FOR	Road bikes, Rideable with children, Mountain bikes, Suitable for trailers, E-bikes, Touring bikes.

[FIND OUT MORE >](#)

Embark on an unforgettable cycling adventure in the heart of the most majestic castles of the Loire, nicknamed the last wild river in Europe. This unique experience will introduce you to the region that, during the Renaissance, was adopted by the greatest monarchs of the kingdom. You wander through a delightfully rural landscape, adorned with some vineyards, mostly on greenways or small country roads.

ITALY

Discover Umbria

FROM	658 €
DURATION	8 days
DIFFICULTY	Challenging
ELEVATION	Hilly



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Digital tools to help businesses and destinations attract pedal-powered tourists

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Connect with the
biggest community
of adventurers



komoot



IRIS

Business Development
Director Travel
iris@komoot.de



Our mission is to make great
outdoor adventures accessible
to all.

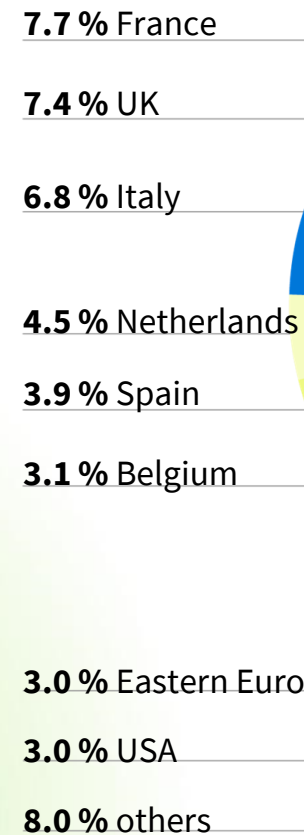
Reach and Markets

- ▢ Europe's biggest outdoor platform
- ▢ International community
- ▢ 100% connectivity with the user's favorite devices



BENELUX
Every 10th Benelux uses komoot

DACH
Every 5th German and every 10th Austrian and Swiss uses komoot



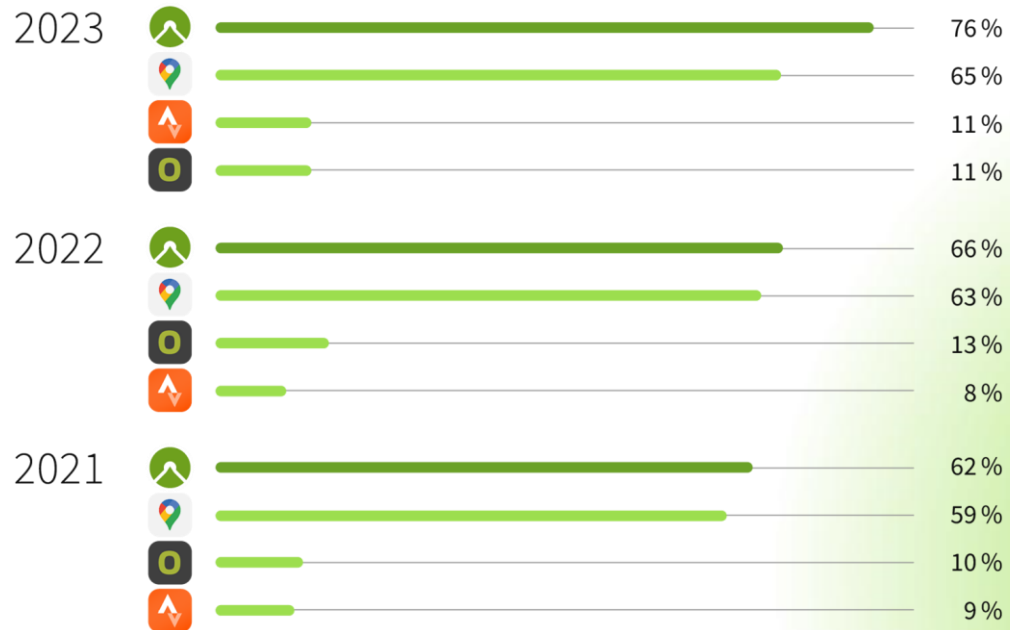
More than 38 million registered users* worldwide



* of which over 20 million in the German speaking market.

Community Relevance

In the ADFC Cycling Travel Analysis 2023, over 12,500 respondents showed that komoot is the most popular app used by outdoor enthusiasts on a bike trip.



Source: ADFC Bicycle Travel Analysis 2023



Excellent app



An absolutely imperative app if you are a frequent biker and want to get around safely in unknown areas.

Real-World Activity Trends

Our Explorer Insights - the treasure box for our partners with a lot potential for their product development

- Monthly report on activities in your region
- Users by home country
- Activity share in your region
- Average distances, durations, and elevation per activity

Save the outlay of expensive field studies and work with komoot!

Switzerland

Jan 24 - Jan 24
Dashboard Period

Previous Month

Users by Home Country

Switzerland	75.35%
Germany	11.20%
France	3.08%
ROW	2.89%
Italy	2.30%
Netherlands	1.29%
3 more	



77,701
Users in Destination

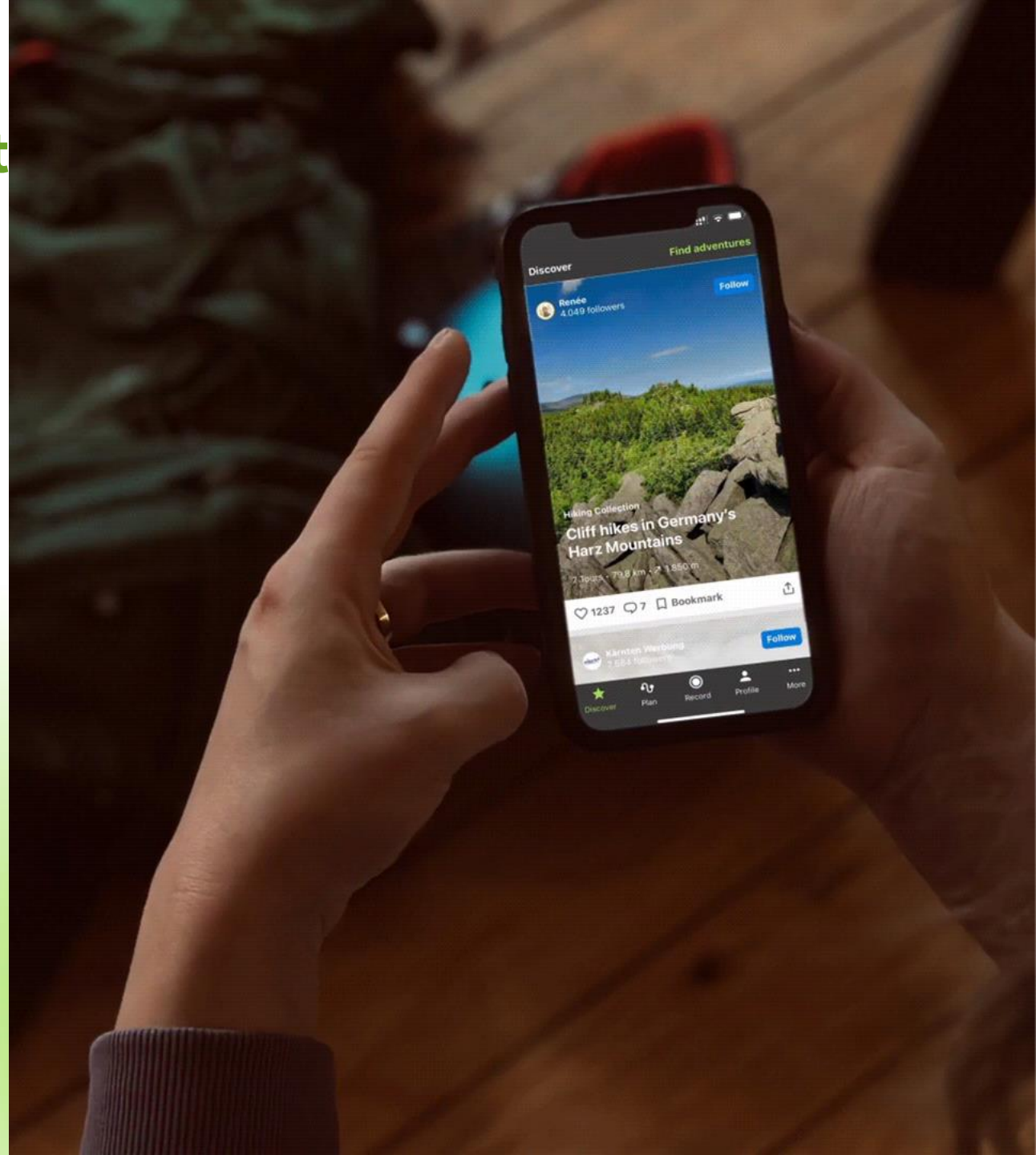
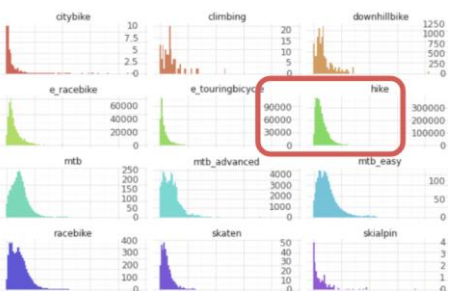
582.2k
Number of Tours in
Destination

Data driven product development

Explorer Insights for tailoring outdoor offers

Case Study: VisitFlanders used komoot data to build a visitor-centered hiking product.

- ▢ Tour distances, durations, where are users active
- ▢ 11 new [hiking Collections](#) born and promoted





Get in touch!



Follow us:



IRIS

Business Development

Director Travel

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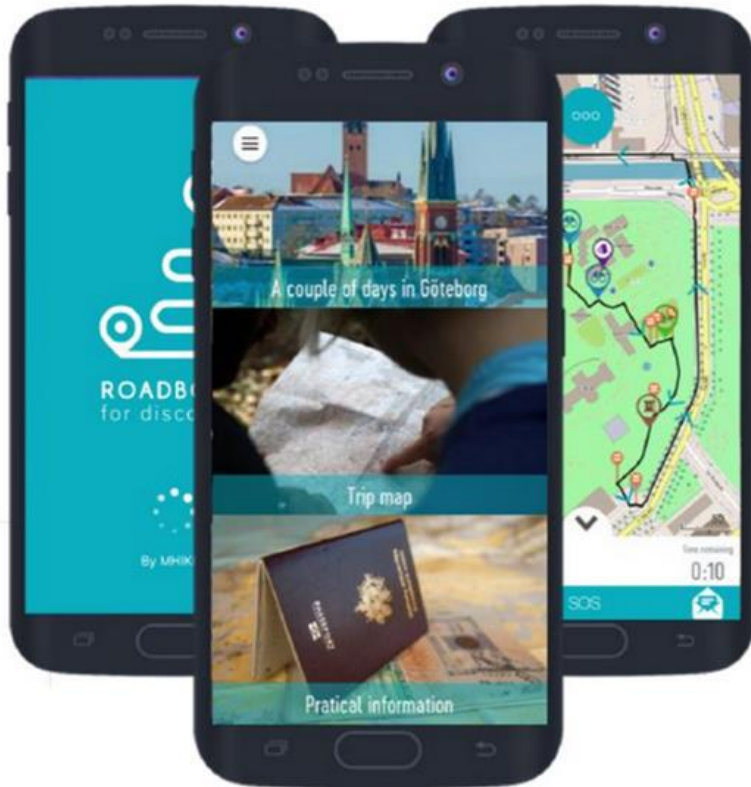
M H I K E S

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Guiding the cyclists but not only!



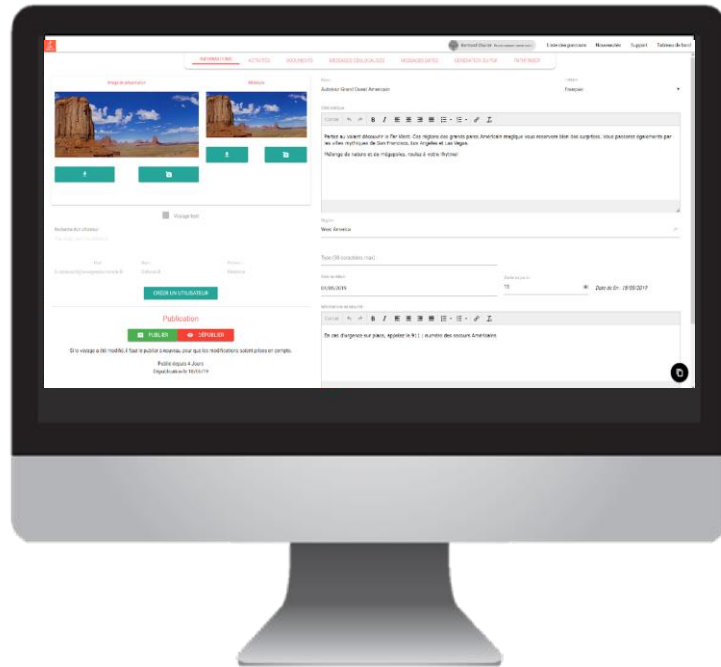
One Tech for all our apps - configurable

- **Of course : we guide in Off-line mode!**
 - Guidance on track with vocal system
 - POIs
 - Partners on track and stage list
- **More than that :**
 - The full roadbook in a day by day description
 - All activities set for the day
 - Vouchers and general descriptions
 - Push notif live or set before
 - POIs & Partners feedback





Protracer : win time in your back end production



- Key features :

- Track creation board :
 - Use the editor app
 - Import GPX
 - Plot manually
- Partners & Roadbook creation
- Roadbook management system for win of time during season
- Statistics available
- PDF printing for Roadbook
- APIs opened

- Administration

- Right system to provide only the needed part to each customers and sell options

Special key feature : Trip builder enabling a Dynamic service package creation easily



Further use of the app : use the data!

OFF-LINE GPS

- Registering of the user gpx track for a statistic display
→ help you at looking where to improve the route!

The screenshot displays the MHIKES app interface for a heatmap view. The top navigation bar includes the MHIKES logo, a back arrow, 'Hike card list', a language dropdown (French flag), and 'Heatmap'. Below this is a sub-menu with 'Informations', 'Trace', 'Enrichment', 'PDF', and 'Publication'. The main area is split into three sections:

- Left Sidebar:** A vertical list of navigation icons, including a person, a plane, a calendar, a list, a house, a cloud, and a camera. The bottom icon is labeled 'ME'.
- Central List:** A search bar with 'Start date' and 'End date' fields. Below it, it shows '1 / 1 RESULT'. A table lists the results:

Name	Date
<input checked="" type="checkbox"/> Voyage de test envoi GPX	09/11/2023, 01:59 PM
- Right Sidebar:** A vertical list of map controls: 'Save', 'Import', 'Display (A)', 'Trace mode (Z)', 'POI mode (E)', 'Delete mode (R)', 'PDF mode (T)', and 'Shortcuts'.

The heatmap shows a blue trail on a green topographic map with red and yellow hotspots indicating high usage or difficulty. The map includes labels for 'Montquaix', 'La Frette', 'Le Bret', and 'D 57f'. A scale bar at the bottom indicates 300 m and 1000 ft. The bottom of the screen shows 'Deselect all results (1)', a counter '1', and 'Show' and 'Cancel' buttons.



MHIKES

THANK YOU



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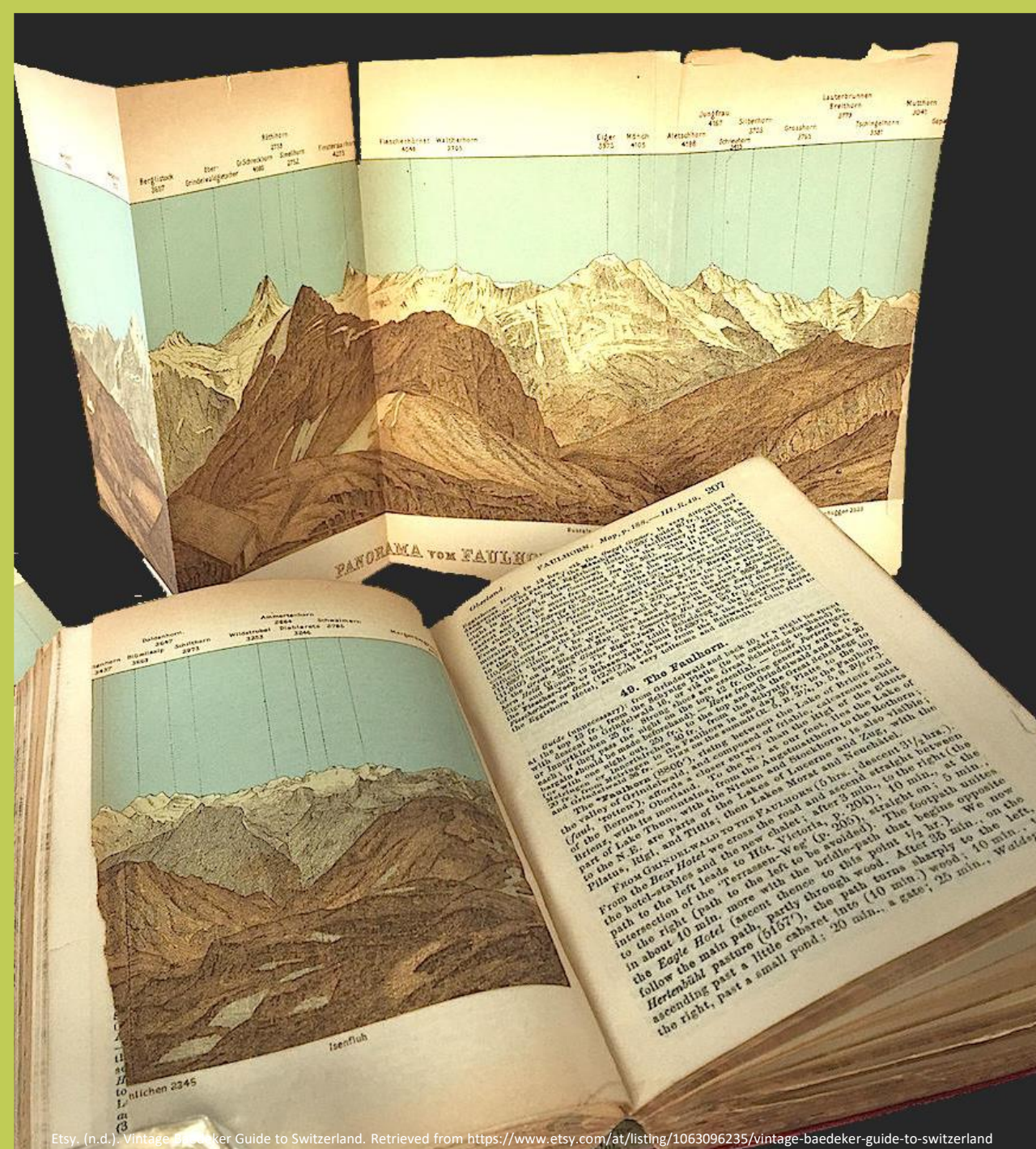
outdooractive

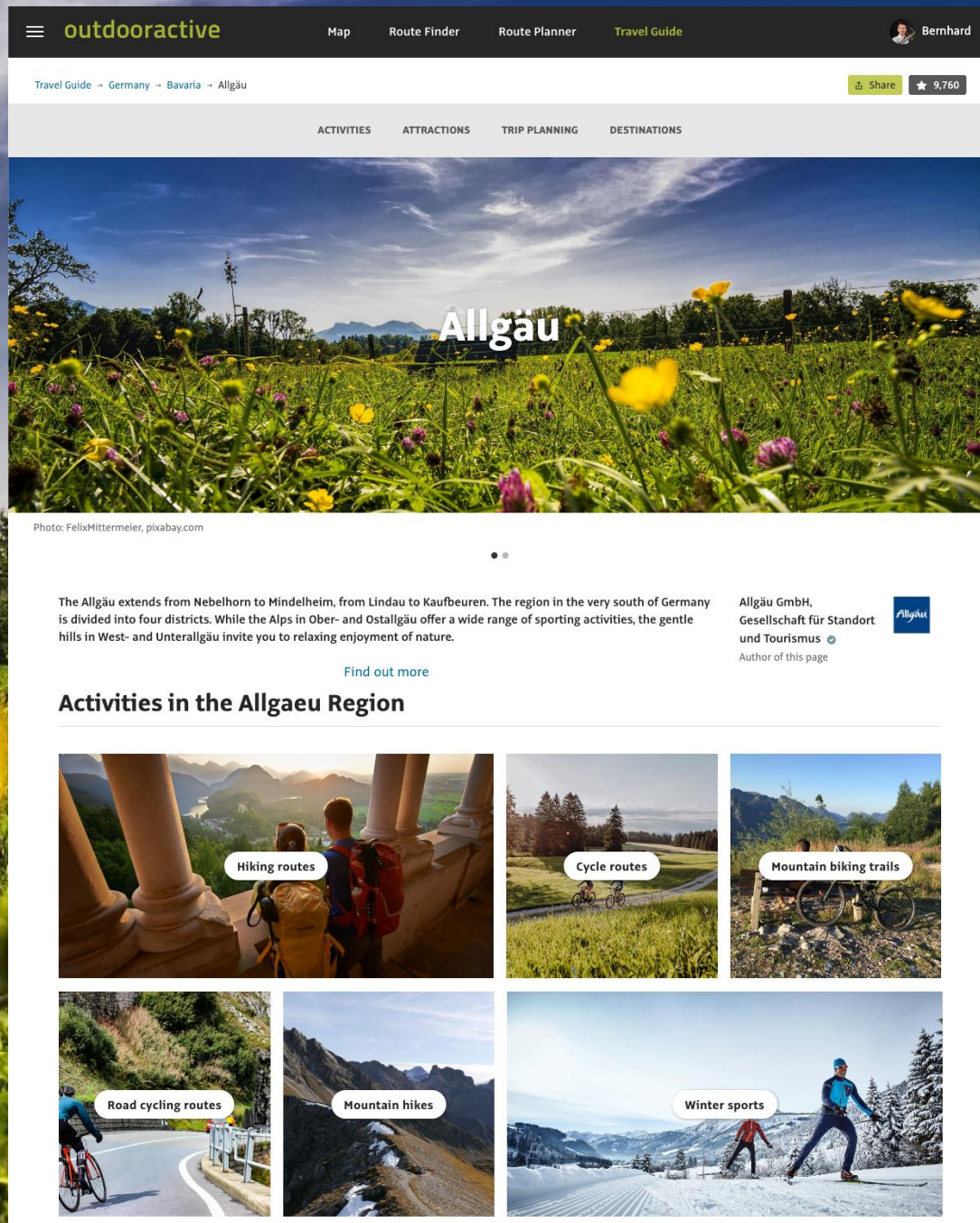
**Unlock the Power of
Cycling Tourism**

Hartmut Wimmer, Founder & CEO

Our WHAT

We are building the digital outdoor ecosystem that serves as a global travel guide.





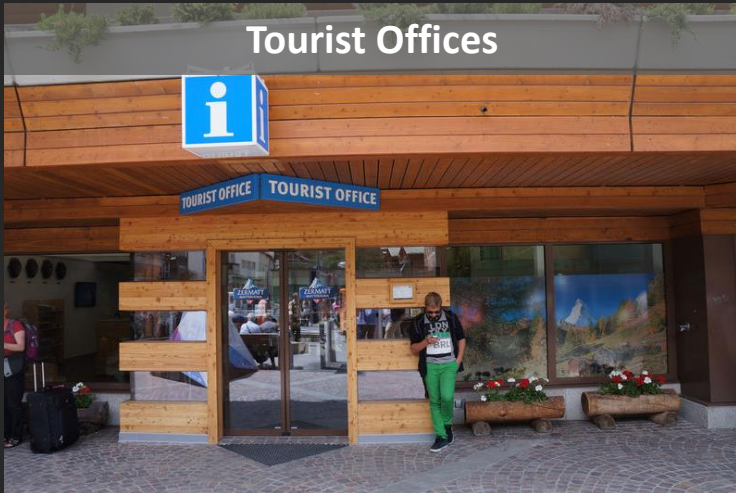
The screenshot displays the outdooractive website interface. At the top, the navigation bar includes 'outdooractive', 'Map', 'Route Finder', 'Route Planner', 'Travel Guide', and a user profile 'Bernhard'. Below the navigation, a breadcrumb trail shows 'Travel Guide > Germany > Bavaria > Allgäu'. A 'Share' button and a star icon with '9,760' are visible. The main content area features a large image of a field of yellow and purple flowers with the word 'Allgäu' overlaid. Below the image, there is a photo credit 'Photo: FelixMittermeler, pixabay.com'. A text block describes the Allgäu region, mentioning its location from Nebelhorn to Mindelheim and its division into four districts. It highlights the gentle hills in West- and Unterallgäu as ideal for nature enjoyment. To the right, there is a logo for 'Allgäu GmbH, Gesellschaft für Standort und Tourismus' and the text 'Author of this page'. A link 'Find out more' is provided. The section is titled 'Activities in the Allgaeu Region' and features six activity cards: 'Hiking routes' (two hikers on a path), 'Cycle routes' (two cyclists on a road), 'Mountain biking trails' (a mountain bike on a trail), 'Road cycling routes' (a cyclist on a road), 'Mountain hikes' (a hiker on a mountain trail), and 'Winter sports' (two skiers on a snowy slope).

Your Travel Guide

Our map-based travel guide is **automatically filled** in the proven structure for **guests and search engines.** Your content is **optimized** and **enriched** with maps, webcams and weather data.

The alliance of the officials with **5,000+ Partners**

Tourist Offices



Guides



Accommodations



Protected Areas

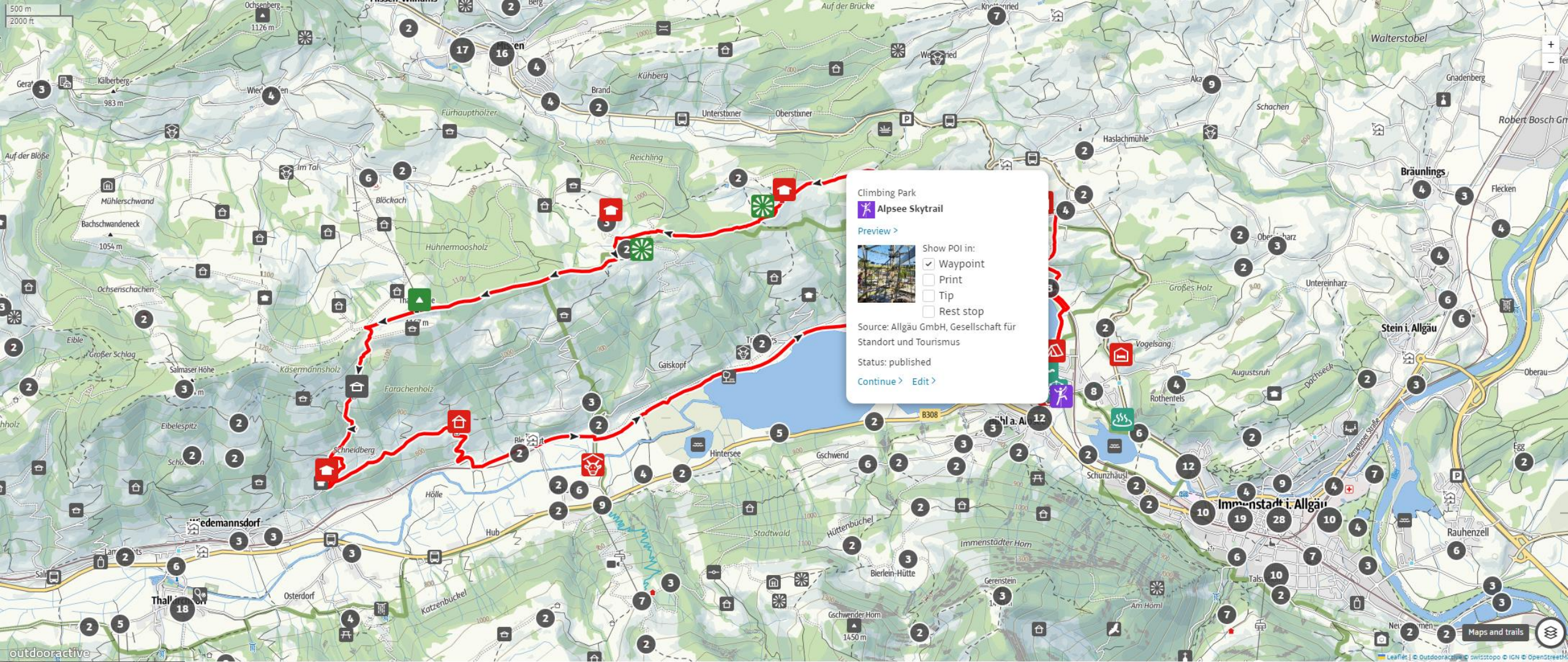


Trail Managers



Associations





↔ 19.7 km ⌚ 5:40 h ▲ 488 m ▼ 488 m ⚓ 1167 m ⚓ 725 m

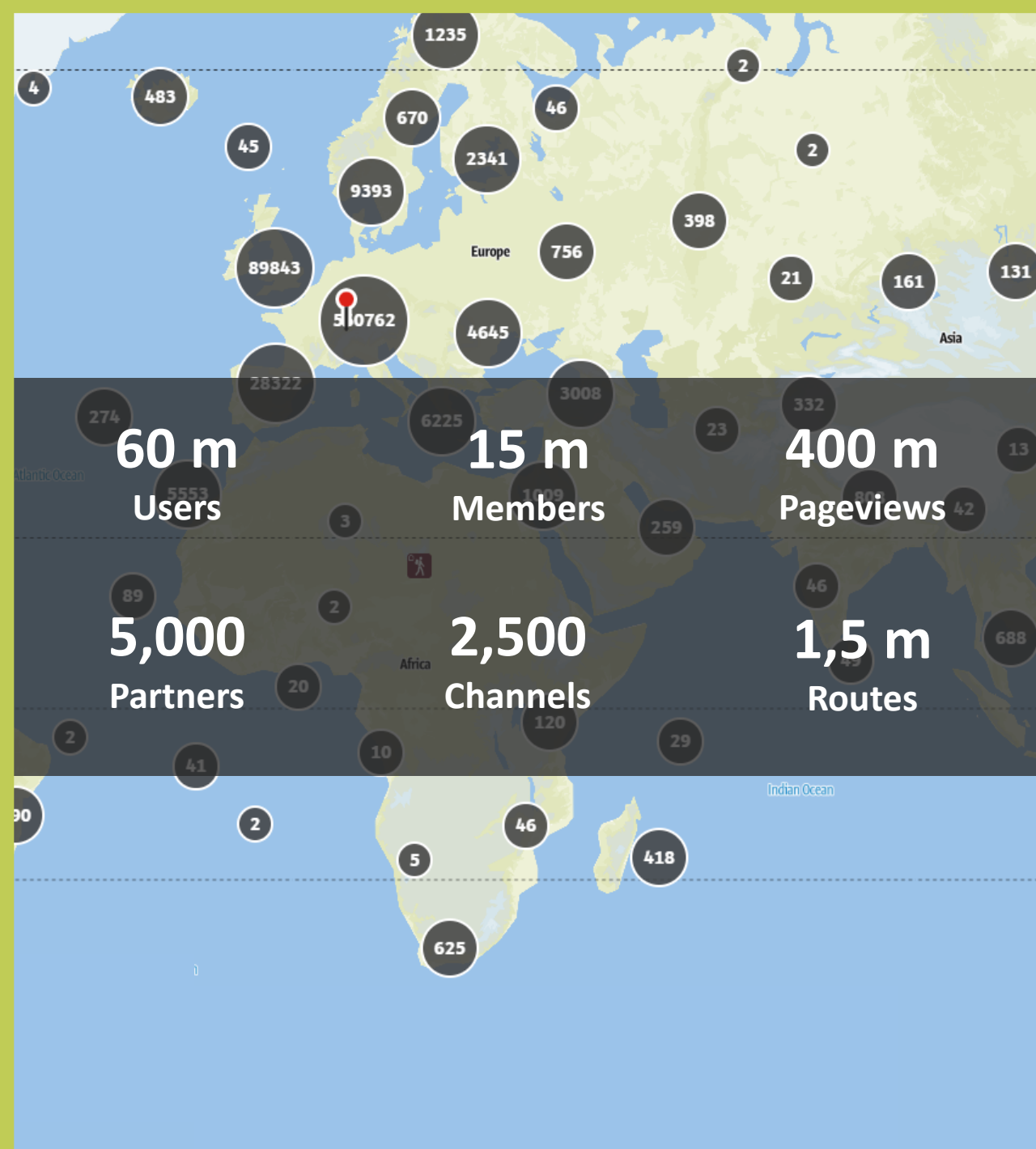


0.0 km Push the arrows to change the view 19.7 km

● Asphalt 7.1 km ● Path 4.8 km ● Dirt road 4.5 km ● Forested/wild trail 3.2 km

Community & Content Reach

Content is viewed 5 times more on our platform than on brands' individual channels, with the potential to reach more than 60 million users.



Analytics & Insights

We measure the entire user **journey** from inspiration to trip planning and on-site navigation, analyzing destination data – for you to learn how to **improve your product.**



European Trails



Potential partners

On the European level



and national organizations

Certifications

Harmonization & Integration of sustainability



Unified communication of the classifications

Quality scores (Draft)

GFT Criteria	Indikator	Score
Trail Management		100
Quality of Experience		82
Trail Information & Guidance		56
Sustainability		94
Culture, Heritage & Communities		79

We digitize the
rules for the use of
nature

The information must be
integrated in every digital
service



outdooractive

Join the Alliance of the Officials



Download this presentation from: business.outdooractive.com

Boosting the growth of cycling tourism with data, quality and digital tools

Thank you for joining!

Stay in touch with EuroVelo
eurovelo@ecf.com

Support us to
connect Europe
by bicycle!

Follow EuroVelo on



ECF gratefully acknowledges financial support from the LIFE Programme of the European Union



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**EuroVelo & Cycling
Tourism Conference**
Viborg, Denmark
23-25 September 2024

THEME UNVEILED & CALL FOR ABSTRACTS OPEN!



EuroVelo and cycling tourism at



ITB
BERLIN

The World's
Leading
Travel Trade
Show*

5-7 MARCH 2024



WED 6 MARCH

Hall 3.1b

Green Stage 14:50 - 15:40

Boosting the growth of cycling tourism with data, quality and digital tools

THU 7 MARCH

Hall 4.1b

Lighthouse Stage 14:30 - 14:50

Solutions for sustainability of long-distance cycle routes - focus on EuroVelo 10 and 13



EUROPEAN CYCLISTS' FEDERATION

WITH KIND SUPPORT OF THE FOLLOWING:



EuroVelo 15 Partnership



EuroVelo 19 Partnership



Interreg South Baltic



Co-funded by the European Union

Interreg CENTRAL EUROPE



Co-funded by the European Union

ICTI-CE