ATLANTIC ON BIKE PROJECT

WORK PACKAGE 2 / COMMUNICATION

ACTIVITY 4 / TRANSNATIONAL MARKETING STRATEGY

The market

Trends

Motivations

The product

Characteristics

Specificities

The competition

Long distance routes

S W O T

Transnational marketing strategy

Positioning (Name, Baseline, Values)

Brand guidelines

Action plan (Objectives, Targets, Tools)

Methodology

- Analysis
  - Desk research/Market surveys/Cycle tourism
  - Data base/30,000 questionnaires
  - Bulletin boards on long distance cyclists
- Interviews
  - Tour operators
  - Publishers
  - Territorial managers/Regional officers
  - Service providers
- Benchmark Eurovelo
  - Marketing
  - Governance

Who are we working for?

YES

NO

Urban cyclists

NO

Day trip cyclists

NO

Sports cyclists

NO

Moutain bikers

Who are we working for?

International level

Local level

Local, regional, national level

What does the ideal trip look like?

Does EuroVelo 1 correspond to this ideal?

THE CYCLING MARKET

THE EUROVELO PRODUCT

THE COMPETITION

SWOT

STRATEGY

## Average length of a trip (overnight cyclists)

Database of long distance routes in France 2009/2017
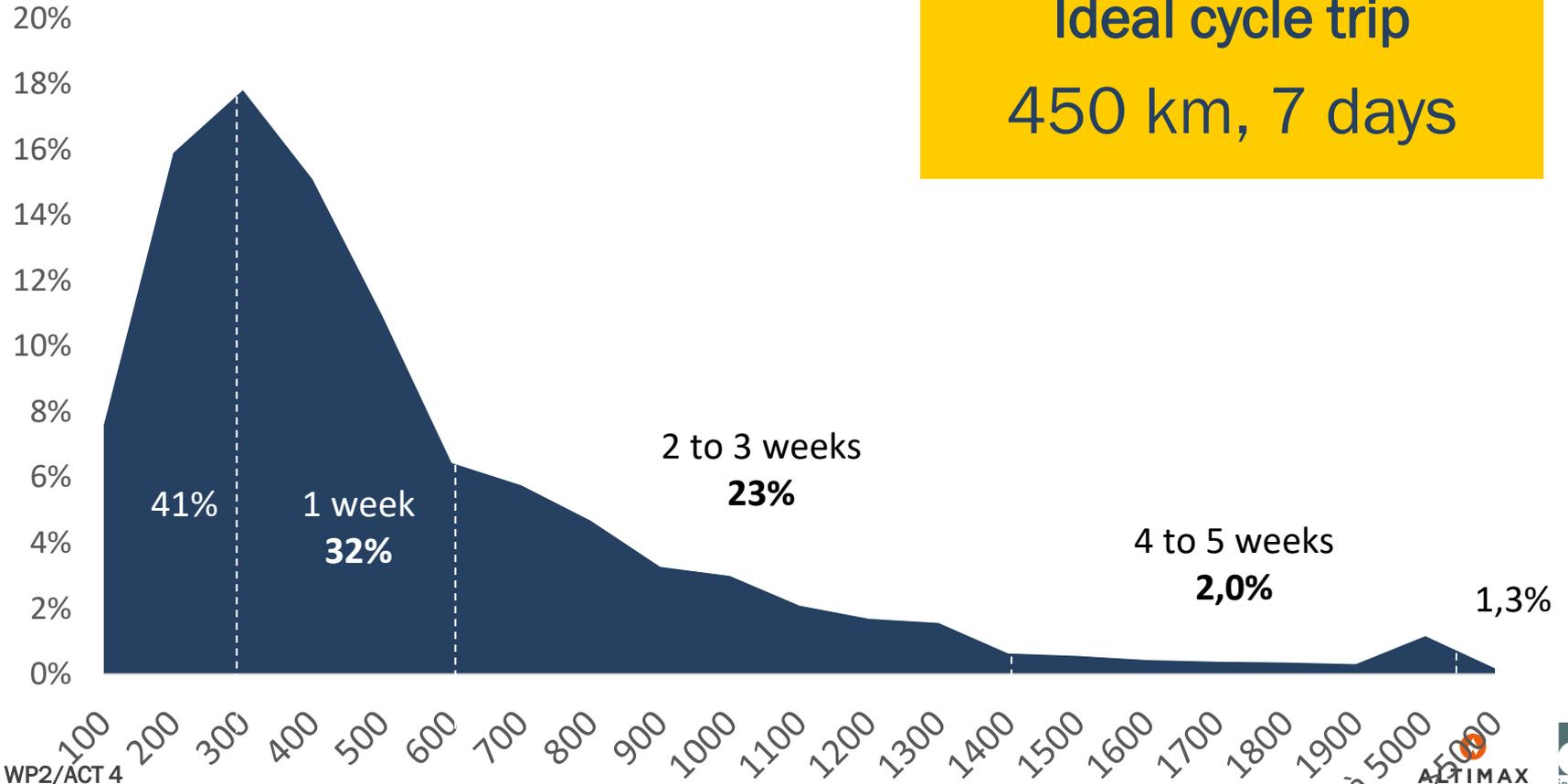
Ideal cycle trip
450 km, 7 days

41% 1 week **32%** 2 to 3 weeks **23%** 4 to 5 weeks **2,0%** 1,3%

Average distance per day (overnight cyclists)

Database of long distance routes in France 2009/2017
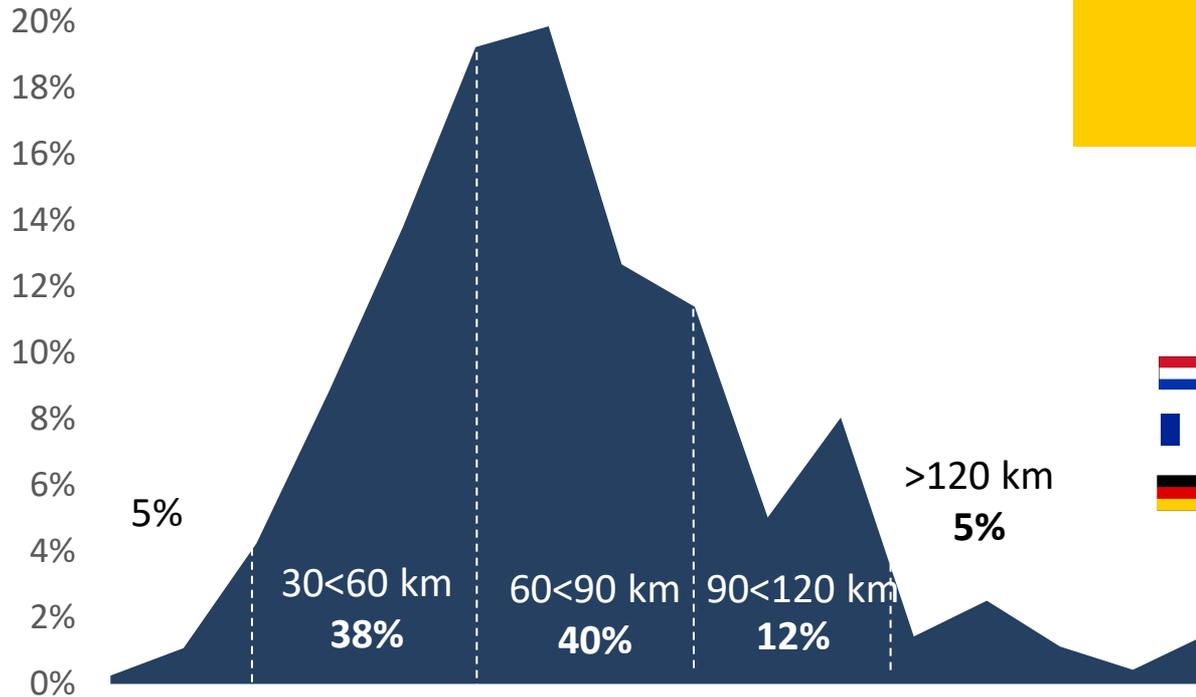
Ideal cycle trip

65 km/day

5%

30<60 km
38%

60<90 km
40%

90<120 km
12%

>120 km
5%

58

64

65

EuroVelo 1

9000 km

150 days

5 months

What does the ideal trip look like?

SHORT
1 WEEK

Does EuroVelo 1 correspond to this ideal?

Duration
Length

NO

Transport (access)

Ideal cycling trip

< 3 h/home + Train

	Bicycle	Train	Bus	Car	Motorhome/Campervan	Plane
🇨🇭	26%	47%	4%	16%	3%	4%
🇫🇷	21%	30%	5%	36%	3%	5%
🇩🇪	20%	36%	3%	36%	2%	4%

■ Bicycle　■ Train　■ Bus　■ Car　■ Motorhome/Campervan　■ Plane

Major markets

EuroVelo 1
Away from major markets

European cycle market
Millions of overnight trips per destination

VP2/ACT 4
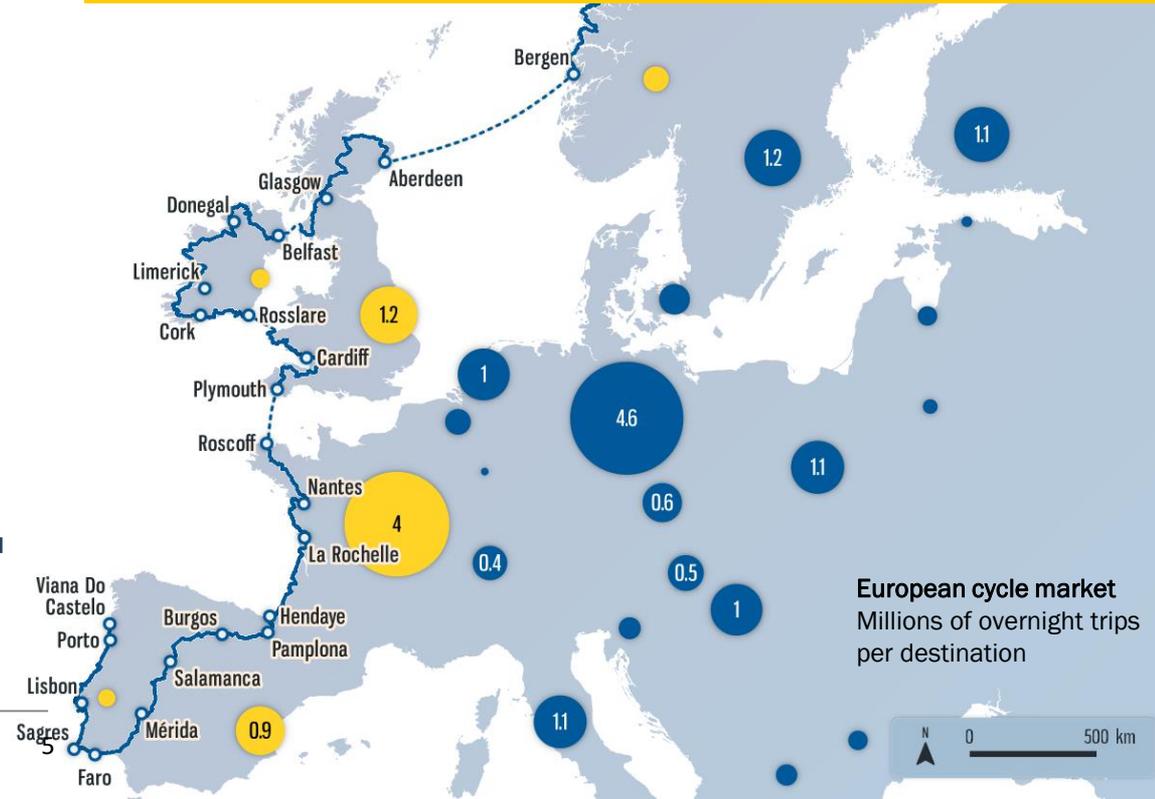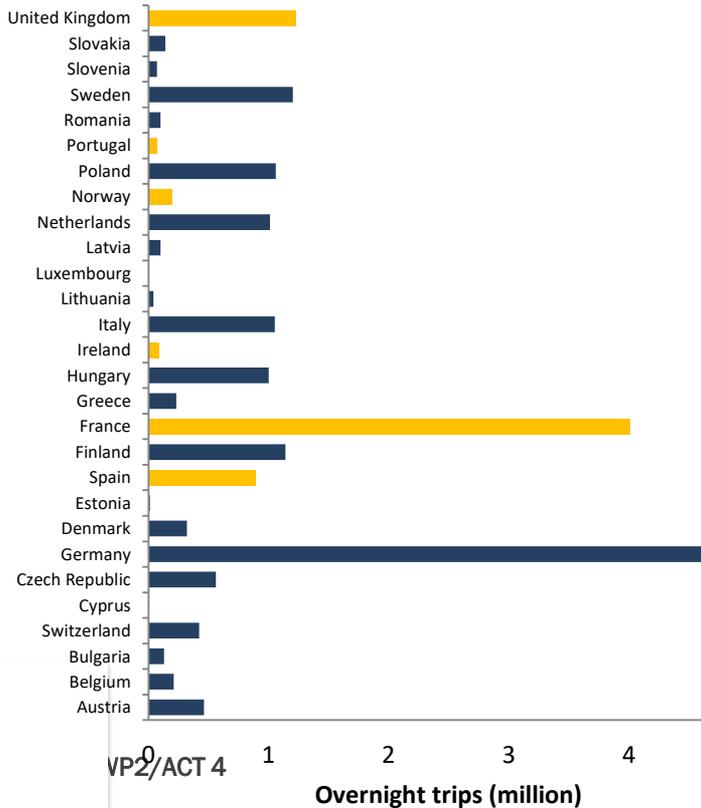
STRAVA Europe cycling heat map
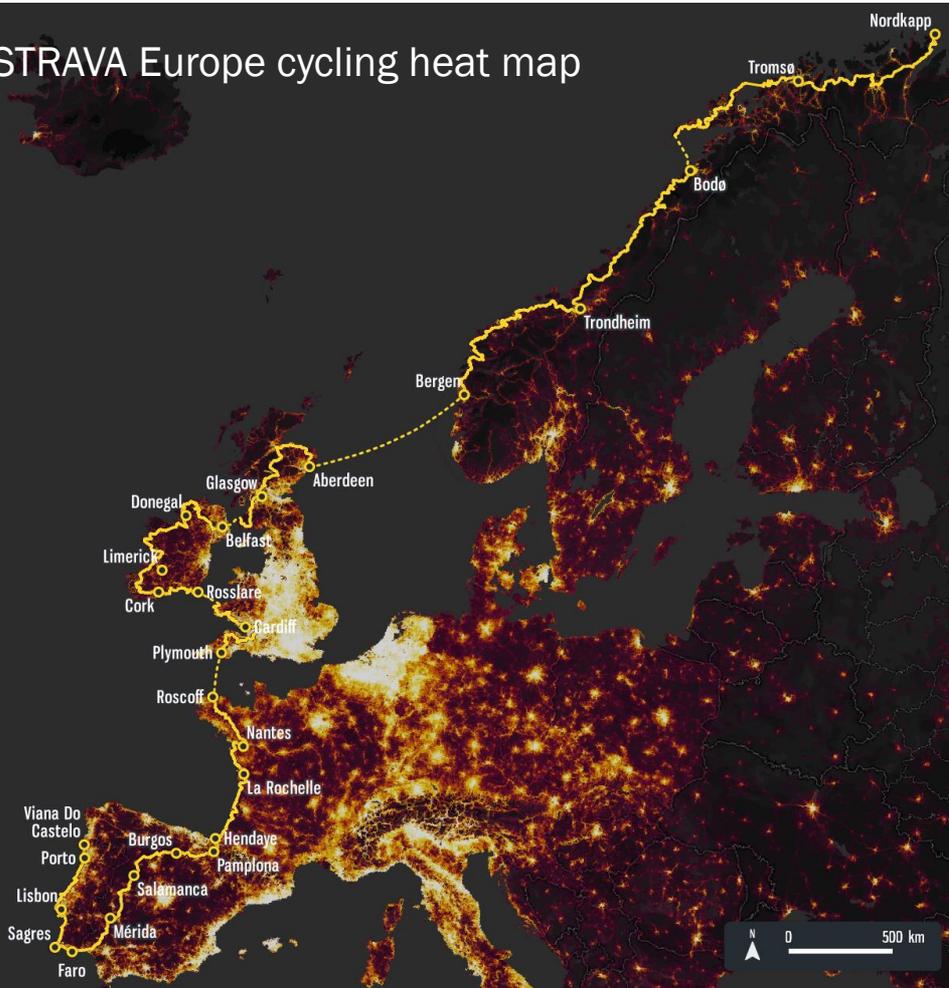
EuroVelo 1
A place cyclists rarely ever go
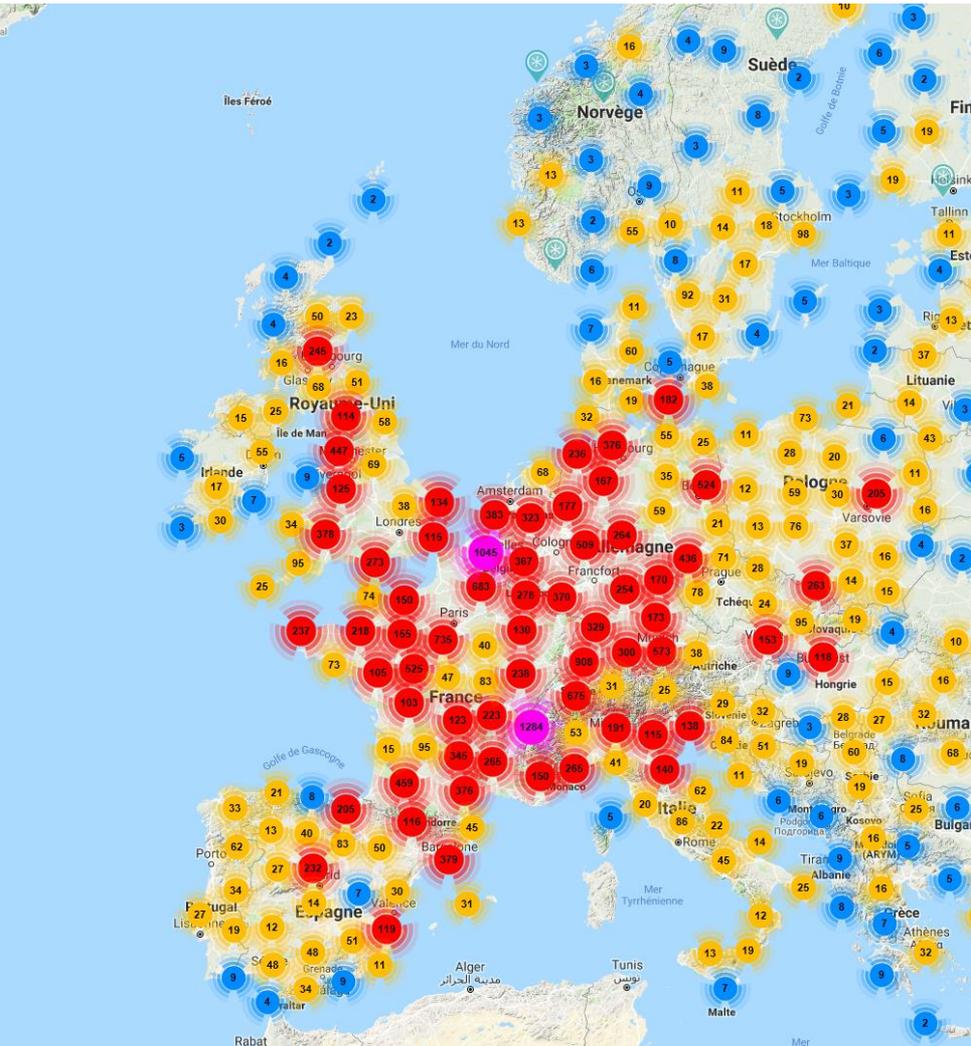
EuroVelo 1
Warmshowers network

Network for long-distance cyclists
- France
- Netherlands and Belgium
- Switzerland
- Germany

Public transportation
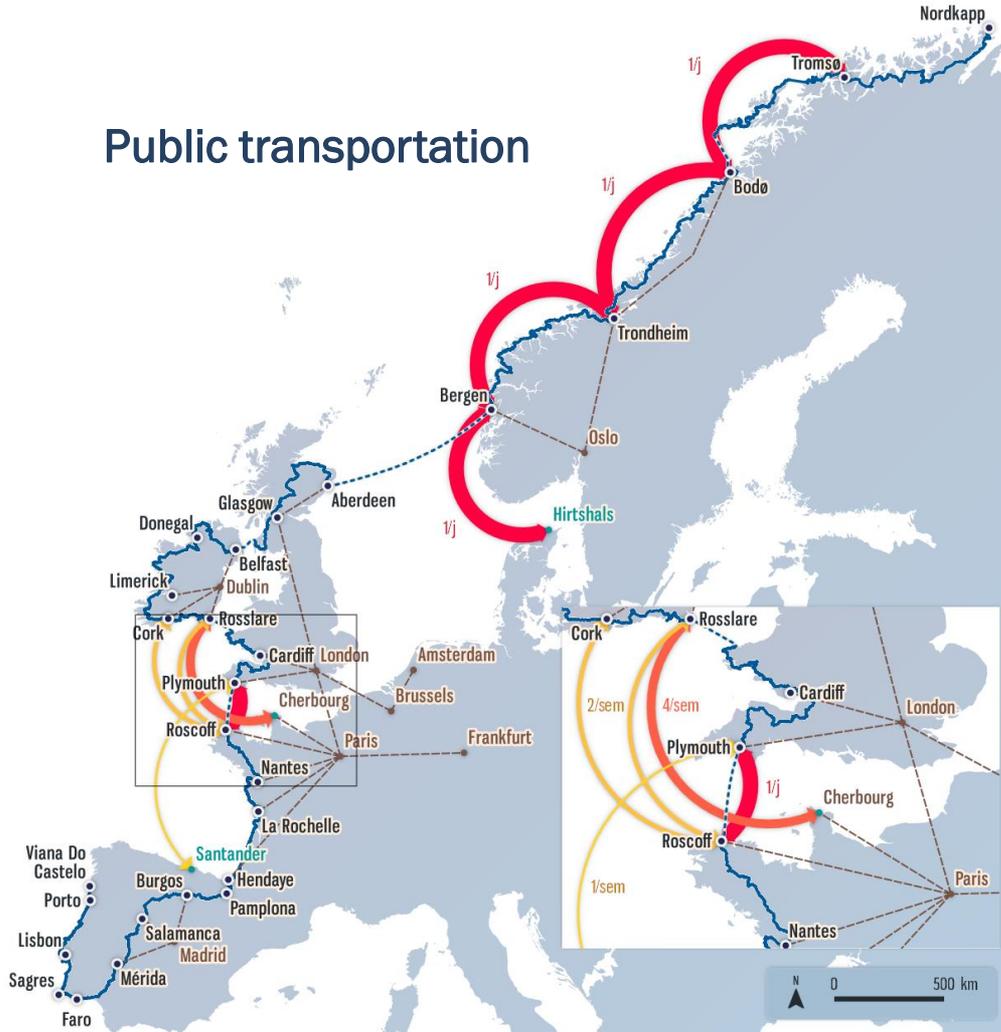
EuroVelo 1
Difficult to get to by public transport

- Paris-Bodö: **45 h**, 8 changes
- Berlin-Portugal PT: **40 h**, 6 changes
- Frankfurt-Aberdeen: **14 h**, 3 changes
- Frankfurt-Rosslare: **27 h**, 4 changes

… but original options by boat

EuroVelo 1
Plane essentials

- Reluctance to travel by plane: 5%
- Have to dismantle your bike and find a box
- Impractical for e-bikes

What does the ideal trip look like?

NOT FAR

EASY TO ACCESS

Does EuroVelo 1 correspond to this ideal?

Proximity
Access
Public transp.

NO

Ideal cycle trip

Comfortable (18-25°C)

Sunny with little wind

Legend: ADFC — France EV8 & 17 — Pays-Bas
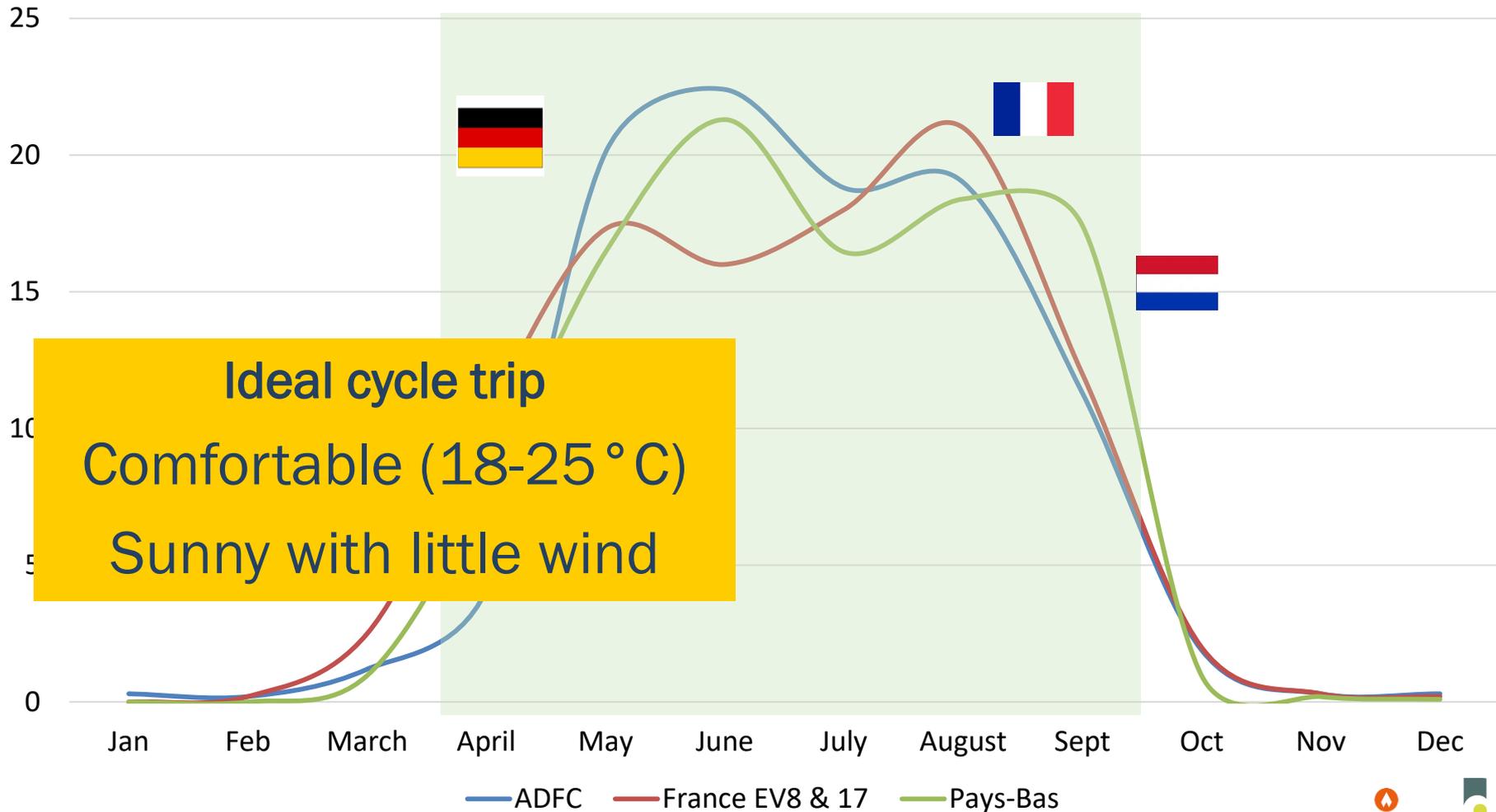
0°C < very cold < 6°C < cold < 12° < cool < 18°C <
comfortable < 24°C < warm < 30°C < hot < 36°C

EuroVelo 1

Large contrasts
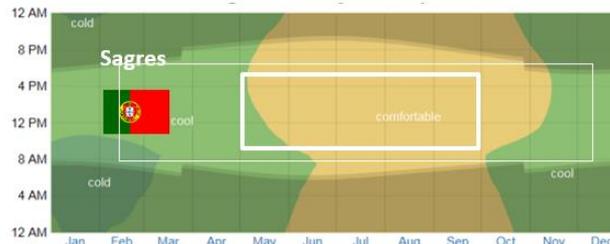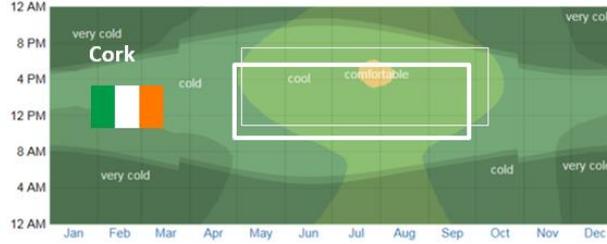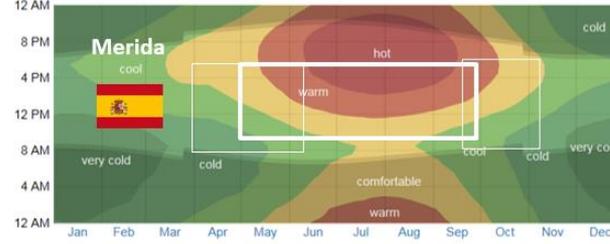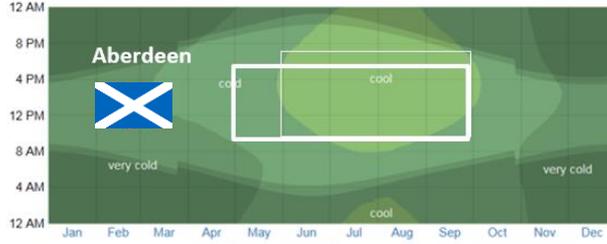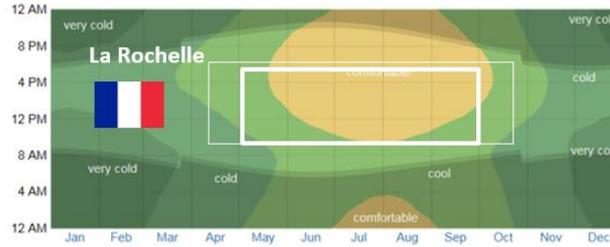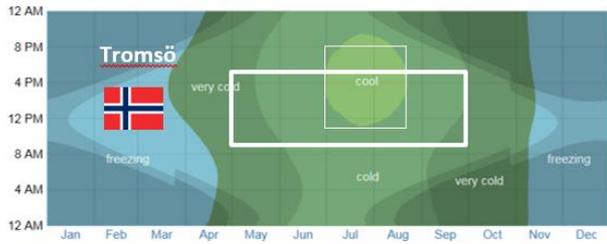
Average number of rainy days

EuroVelo 1

Fairly rainy

Legend: Bodo, Inverness, Cork, Bristol, La Rochelle, Salamanca, Faro
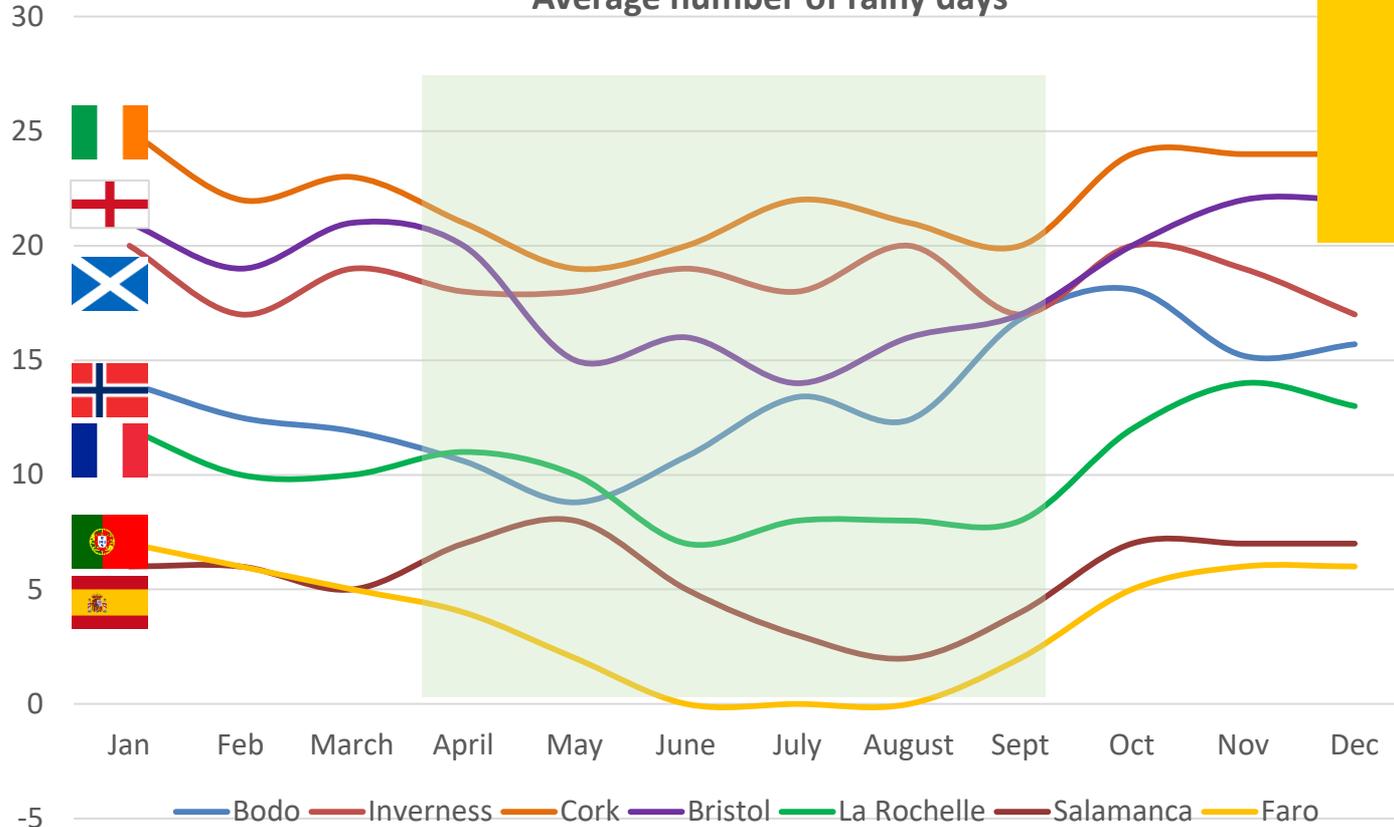
What does the ideal trip look like?

COOL AND SUNNY

Does EuroVelo 1 correspond to this ideal?

Climate

NO

Not always
Not everywhere

Ideal cycling route

Safe, traffic free, low traffic

Well surfaced

EuroVelo 1
Currently, routes with little traffic, good road surfaces

EuroVelo 1

Potentially in the future, routes with little traffic, good road surface

What does the ideal trip look like?

TRAFFIC FREE
WELL SURFACED

Does EuroVelo 1 correspond to this ideal?

Traffic
Surface

NO

Not yet

Ideal cycle route

FLAT

EuroVelo 1

Challenging!

Elevation gain

120,000 m in 9400 km

830 meters every day/65 km per day
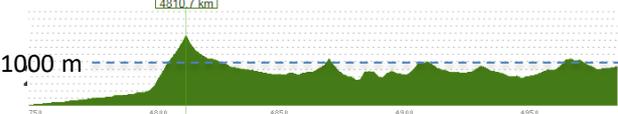
Pedelec users

Age of pedelec tourists in France

70 et + ans	12,2%
60 > 69 years	12,2%
50 > 59 years	7,4%
40 > 49 years	3,7%
30 > 39 years	2,4%
20 > 29 years	2,3%
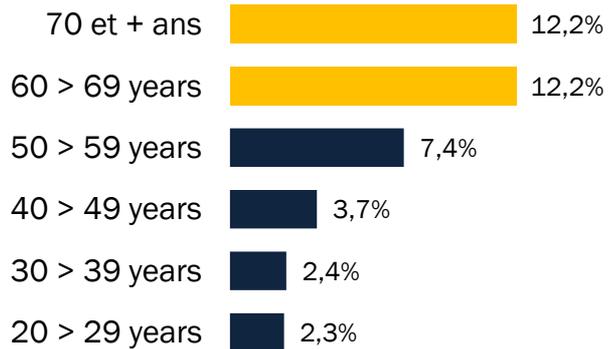
Pedelec sold in France x1000

Year	Value
2006	6
2007	9
2008	15
2009	24
2010	38
2011	40
2012	46
2013	56
2014	78
2015	102
2016	134
2017	257

% Pedelec /cycle tourists

Country	Value
Belgium	20,0%
Germany	18,9%
Netherlands	15,6%
Switzerland	13,4%
UK	10,0%
France	6,9%
Spain	4,0%
USA	0,0%
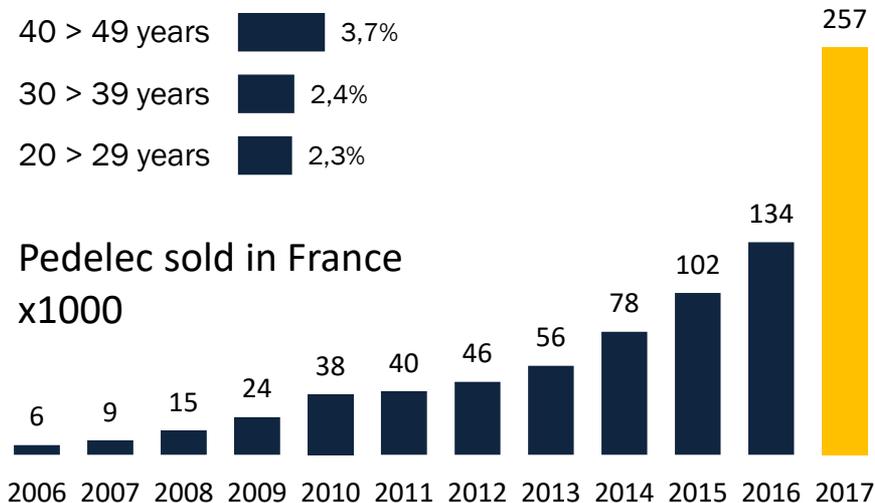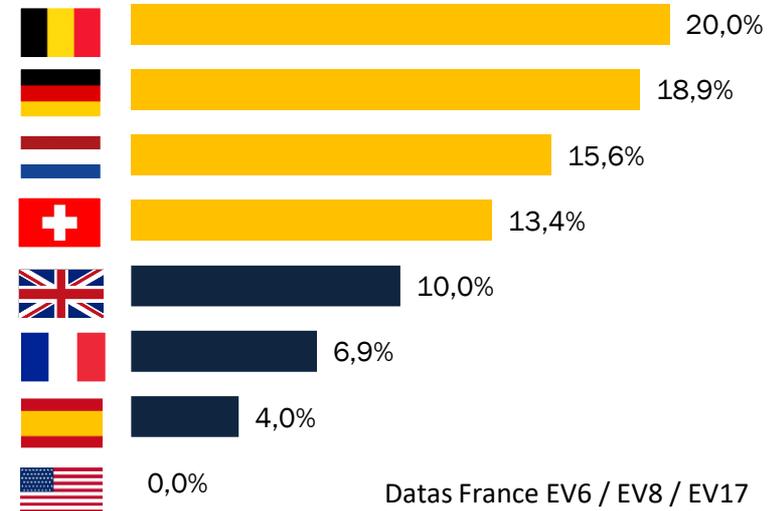
Datas France EV6 / EV8 / EV17

ALTIMAX   inddigo

What does the ideal trip look like?

FLAT

Does EuroVelo 1 correspond to this ideal?

Elevation

NO

Signposting,
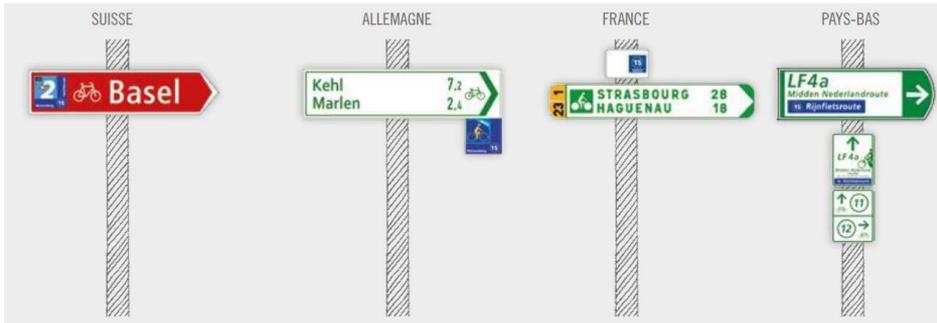
Ideal cycle route

Well signposted
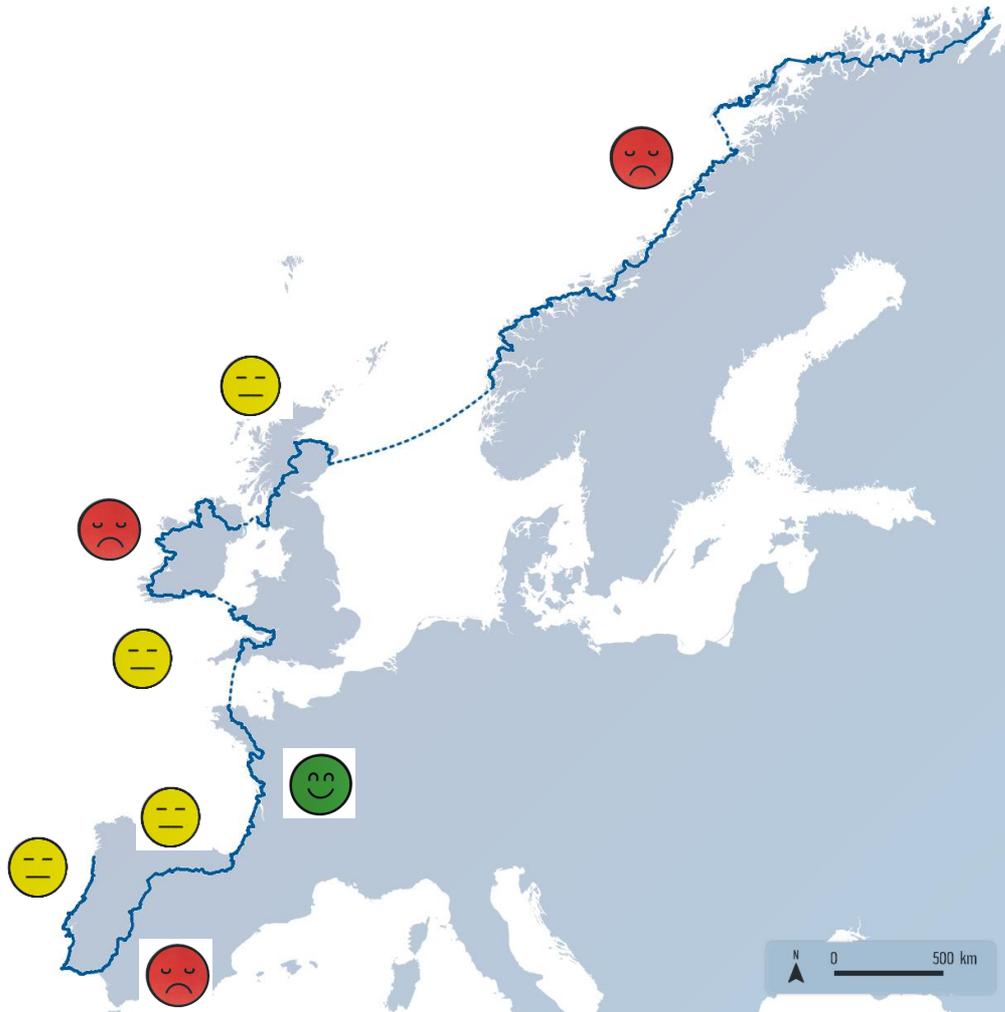
EuroVelo 1
Existing EV 1 signposting

What does the ideal trip look like?

WELL SIGNPOSTED

Does EuroVelo 1 correspond to this ideal?

Signposting

NO

Not yet

Services

Ideal cycle route

High density of services

Density

EuroVelo 1
The lowest population density in Europe

- 80% of the route < 15 inhab/km²
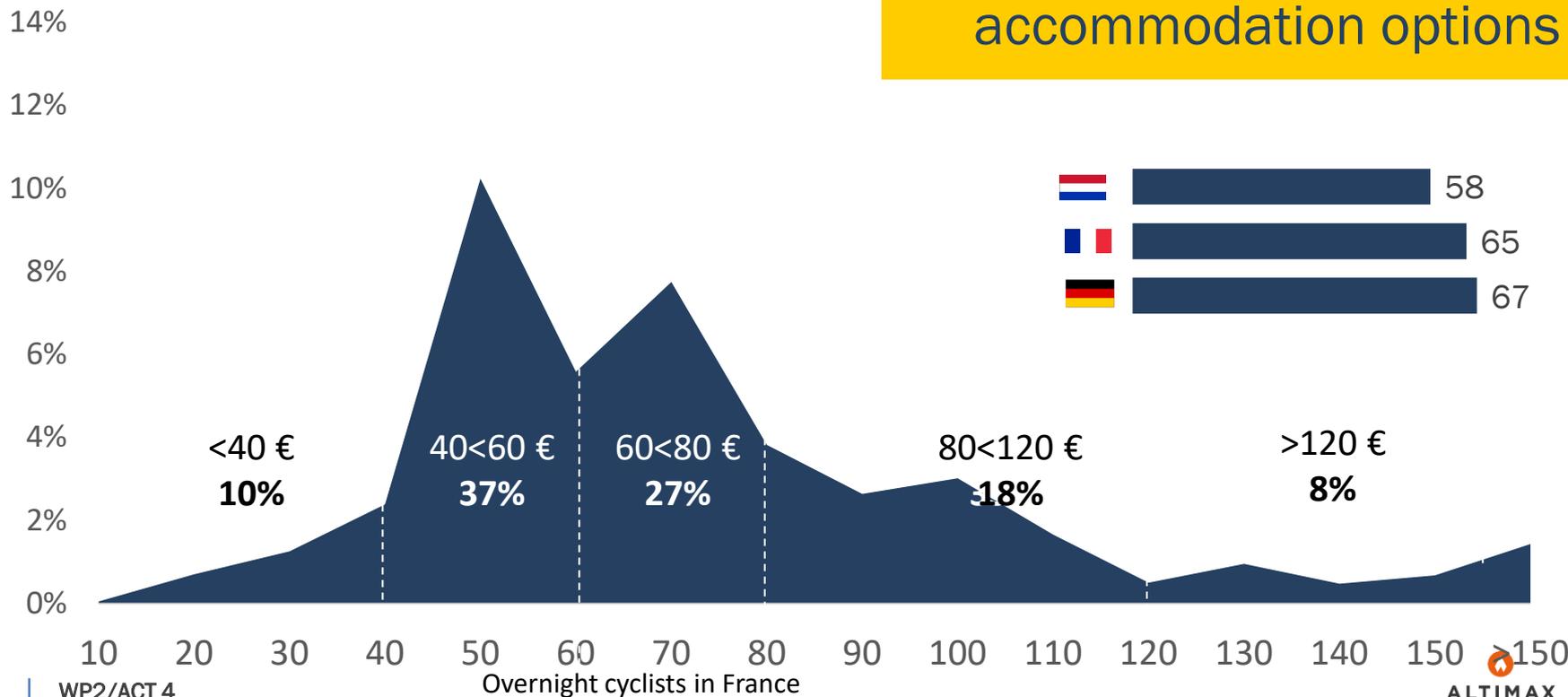
Ideal cycle route
Need for a wide range of accommodation options

Daily spend

- <40 € **10%**
- 40<60 € **37%**
- 60<80 € **27%**
- 80<120 € **18%**
- >120 € **8%**

🇳🇱 58
🇫🇷 65
🇩🇪 67

Overnight cyclists in France

ALTIMAX   inddigo

What does the ideal trip look like?

HIGH DENSITY OF SERVICES
WIDE RANGE OF ACCOMMODATION OPTIONS

Does EuroVelo 1 correspond to this ideal?

Services
Accommodation

NO

Ideal cycle route

Well known
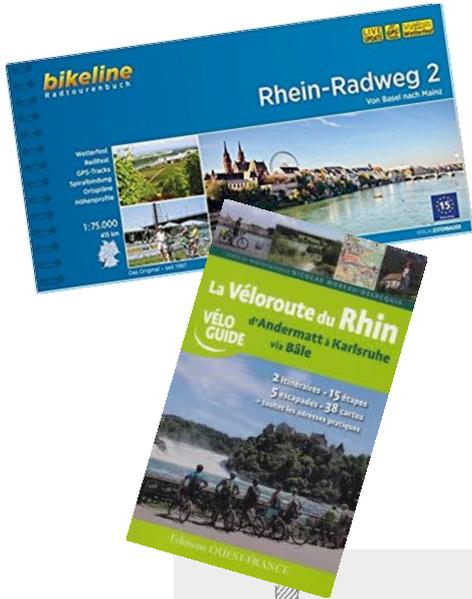
Germany: most popular cycle routes abroad
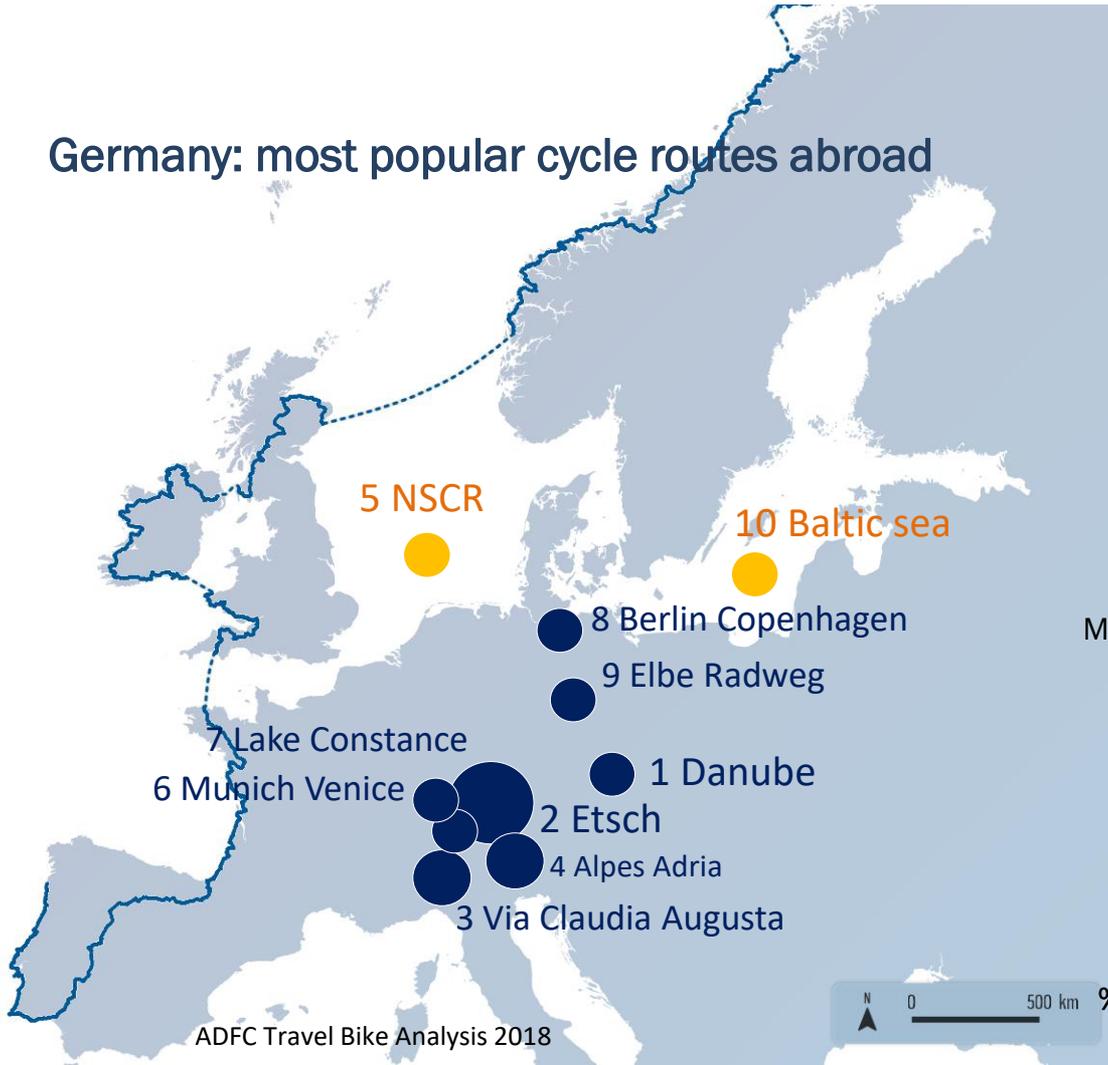
EuroVelo 1
Not on the German radar

5 NSCR

10 Baltic sea

8 Berlin Copenhagen

9 Elbe Radweg

7 Lake Constance

6 Munich Venice

1 Danube

2 Etsch

4 Alpes Adria

3 Via Claudia Augusta

ADFC Travel Bike Analysis 2018

0   500 km

% cycle routes abroad

Baltic sea cycle route
Elbe cycle route
Berlin-Copenhagen
Lake Constance
Munich-Venice cycle route
North Sea Cycle Route
Alpe Adria cycle route
Etsch cycle route
Via Claudia Augusta
Danube cycle route

0   2   4   6   8   1

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Germany: anticipated travel destinations for 2018
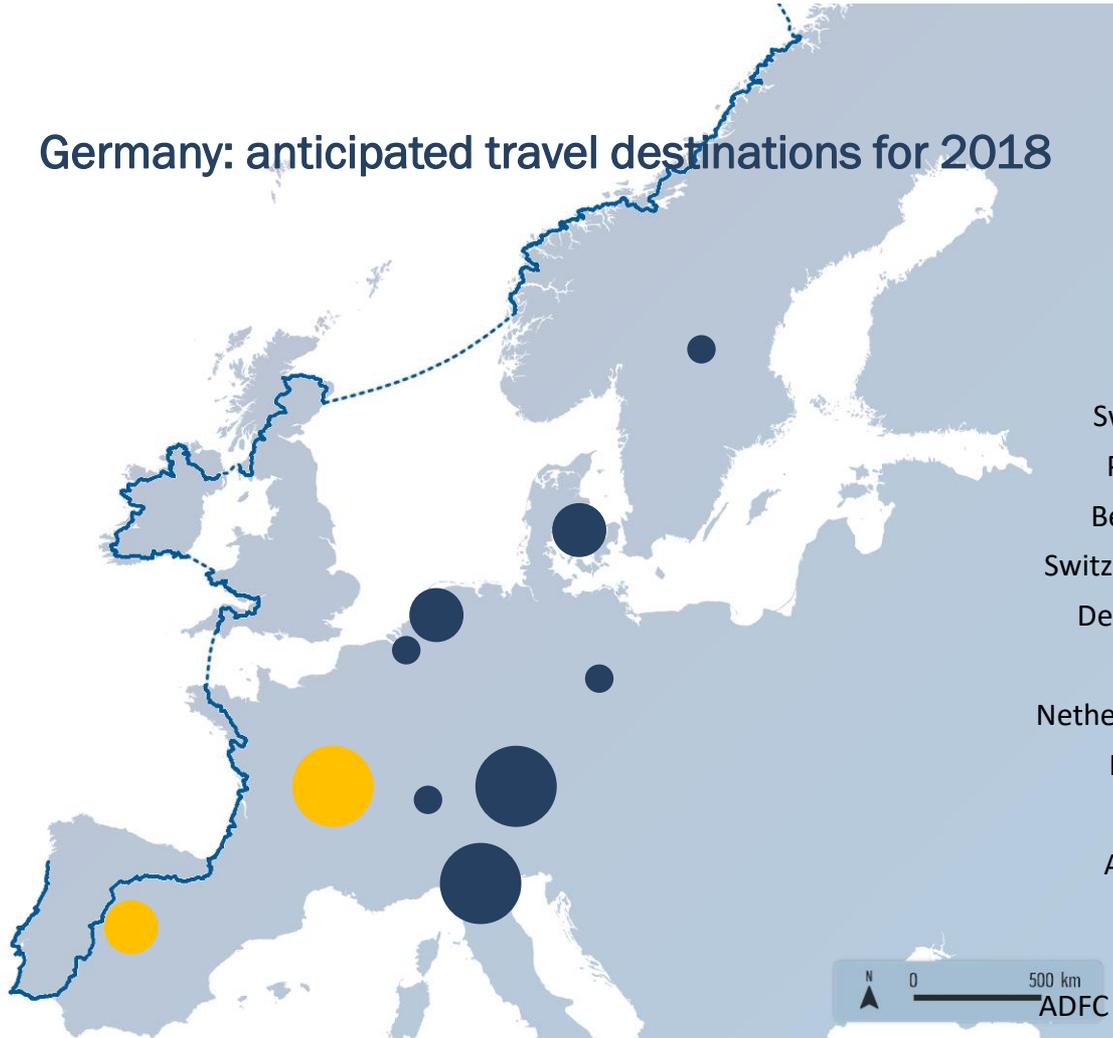
EuroVelo 1
Only two EuroVelo 1 countries

% cycle routes abroad

ADFC Travel Bike Analysis 2018
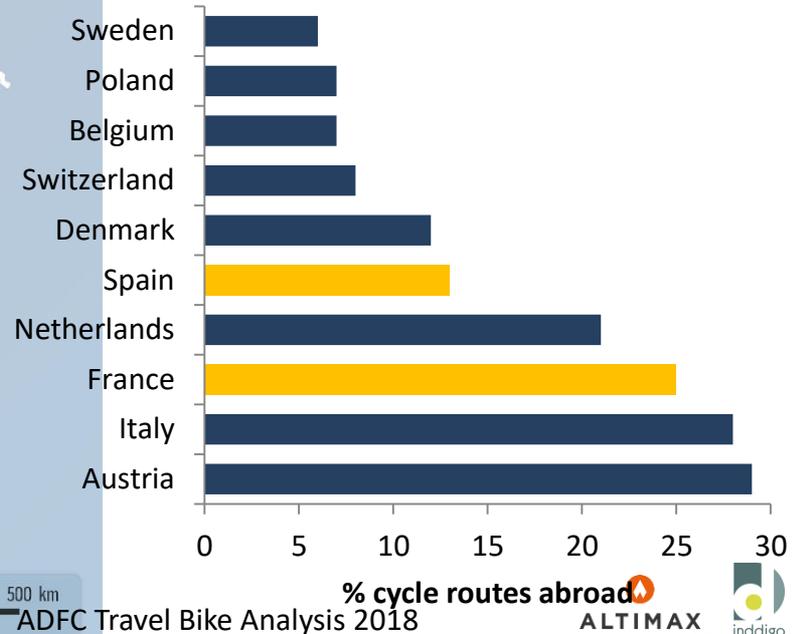
What does the ideal trip look like?

WELL KNOWN

Does EuroVelo 1 correspond to this ideal?

Awareness

NO

Not yet

Cyclists' motivations
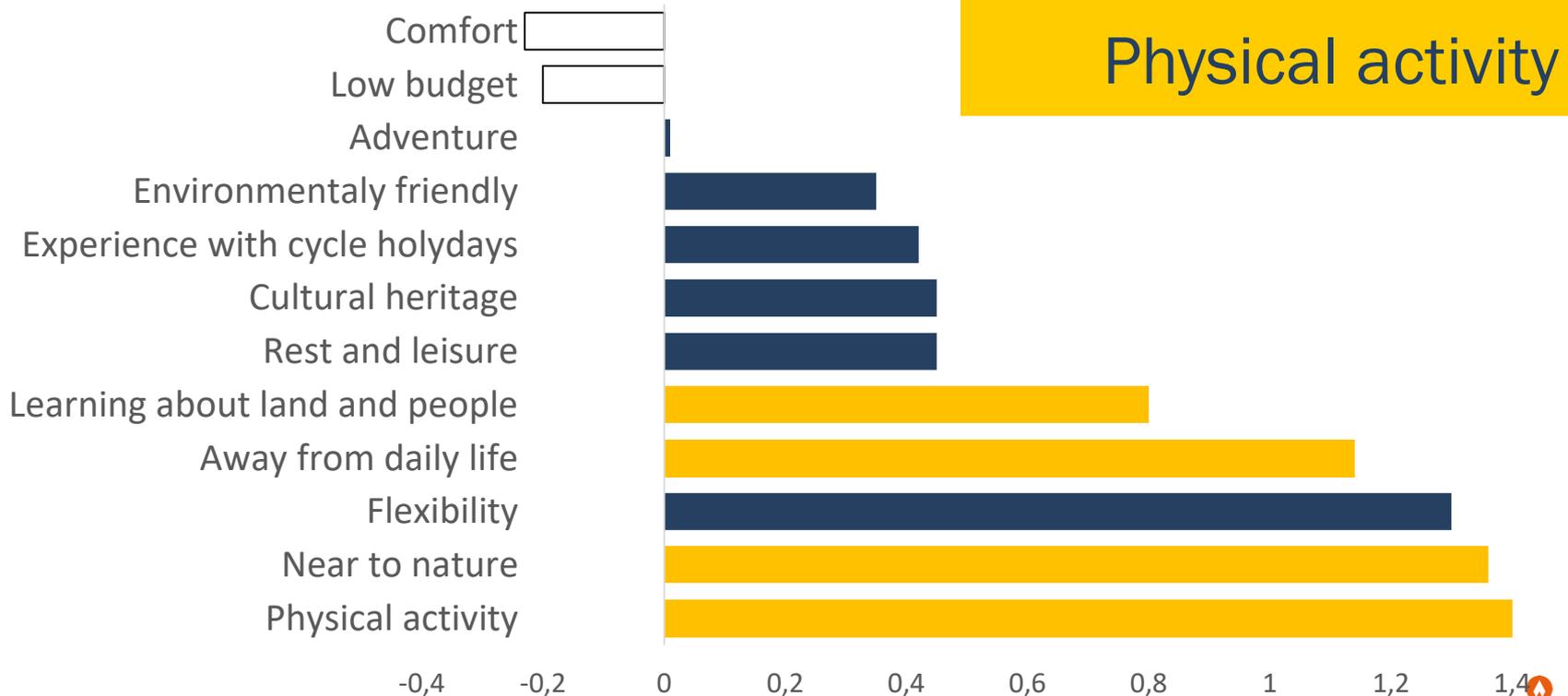
Ideal cycle route
Nature
Physical activity

Motivation	Value
Comfort	
Low budget	
Adventure	
Environmentaly friendly	
Experience with cycle holydays	
Cultural heritage	
Rest and leisure	
Learning about land and people	
Away from daily life	
Flexibility	
Near to nature	
Physical activity	

-0,4 -0,2 0 0,2 0,4 0,6 0,8 1 1,2 1,4 1,6

ALTIMAX   inddigo

What does the ideal trip look like?

NATURE
ACTIVE TRAVEL
LEARNING EXPERIENCE

Does EuroVelo 1 correspond to this ideal?

Motivations

YES

Ideal cycle route   EuroVelo 1

Short	🔴	Very long
Close	🔴	Far away
Accessible PT	🔴	Difficult access
Density of services	🔴	Lowest density
Cool	🔴	Cold and hot
Sunny	🔴	Rainy
No wind	🔴	Windy
Awareness	🔴	Not on cyclists' radar
Flat	🔴	Challenging
Signposted	🟠	No continuity
Nature / Physical activity	🟢	Yes/Yes

THE CYCLING MARKET

THE EUROVELO PRODUCT

THE COMPETITION

SWOT

STRATEGY

OK
The IDEAL cycle route is nice, safe & comfortable
and guarantees a wonderful holiday...

EuroVelo 1 is NOT the ideal cycle route.

But does this ideal cycle route inspire you?

Not really

NO

The Guardian

10 best cycle destinations

That make you dream

Not EV1

Or German cycle routes

Sweden Sörmland Forest & Lakes

Bavarian Breeze

Danube Passau-Belgrade

Rides with altitude

Tom Simpson Pilgrimage

Adriatic Shores

Balkan Beauty

Fruitful Seasons
For Riding the Algarve

Italian Romance

Andalucian
Meander

ALTIMAX   inddigo

AtlanticOnBike
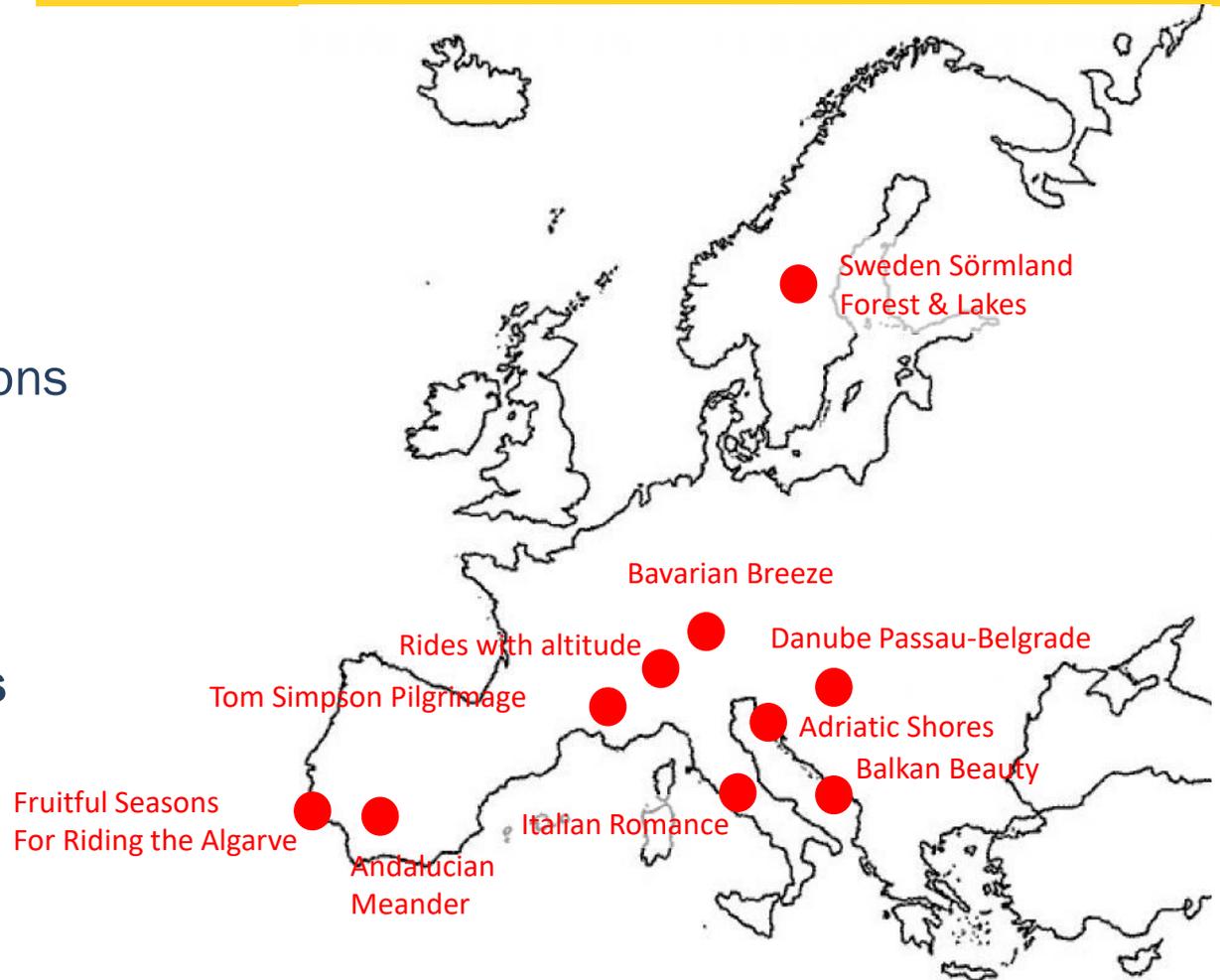
The Telegraph

30 incredible cycling holidays to add to your bucket list

Wild West

Cuba

Costa Rica

Peru

Chile

Atlas

Kirghizstan

Jordan Jaunt

Myanmar

Cambodia

Sri Lanka

Madagascan Highlands

Cape Town

NZ South Island*

www.waouo.com

But does this ideal cycle route inspire you?

NO

Not really

And does EuroVelo inspire you?

AtlanticOnBike

And does EuroVelo inspire you ?

YES
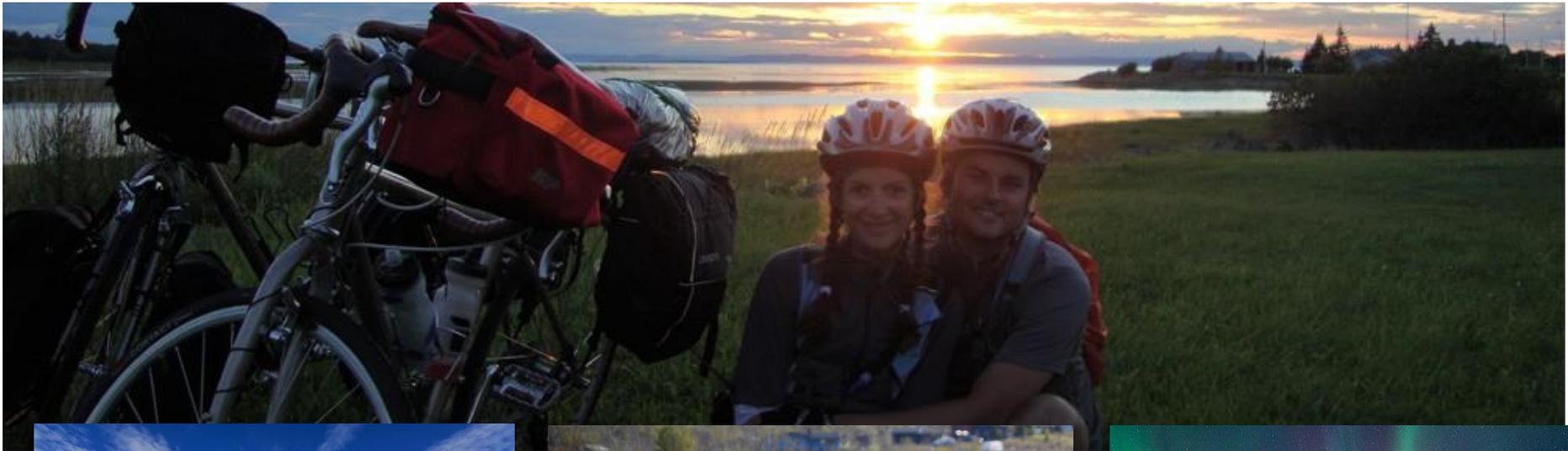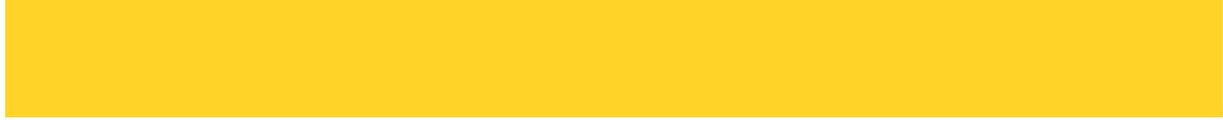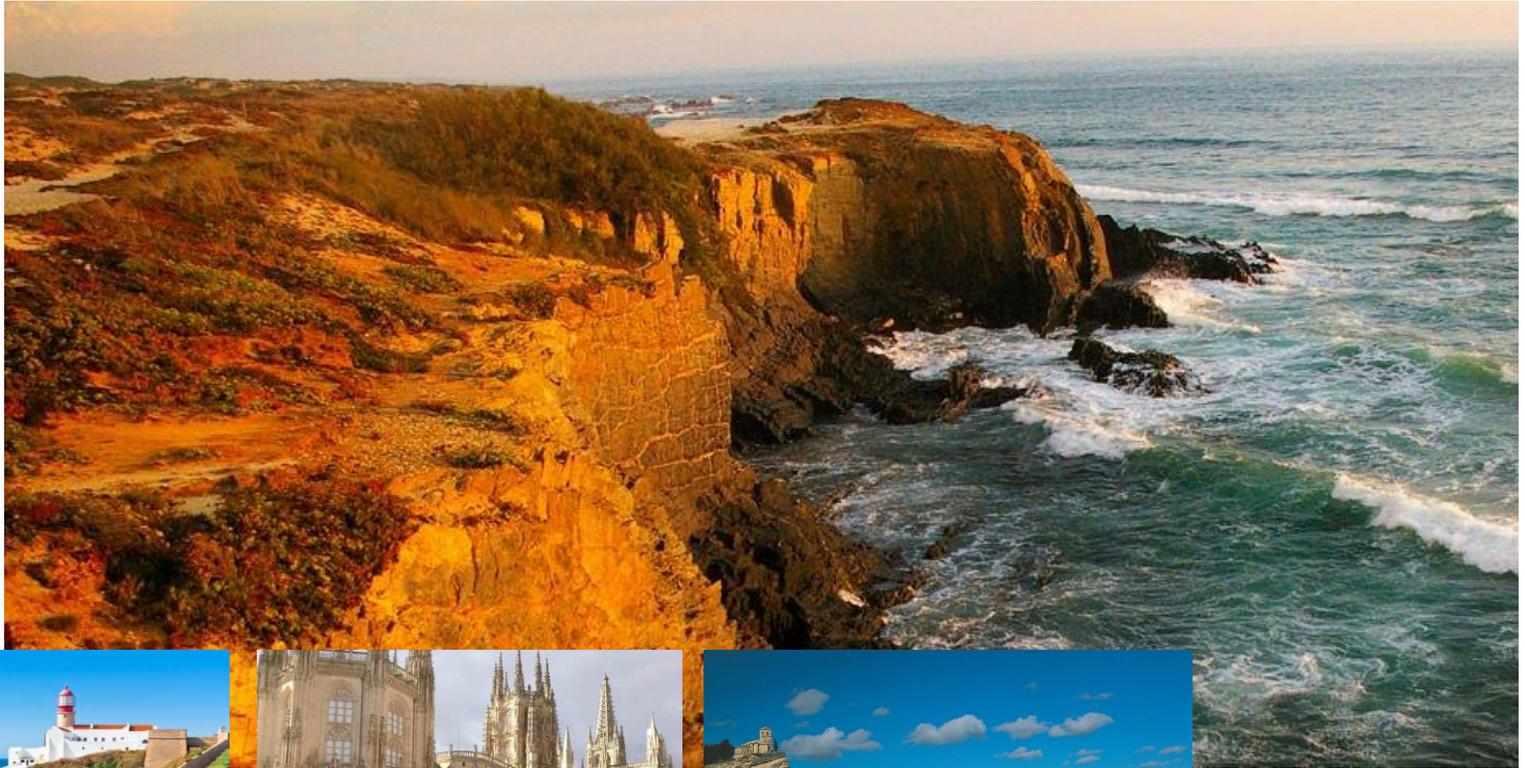
Definitely!

THE CYCLING MARKET

THE EUROVELO PRODUCT

THE COMPETITION

SWOT

STRATEGY

S

- Atlantic unity +/-
- Nature, wilderness
- Break/modernity
- Celtic/Scand. cultures
- Diversity (languages, cultures, landscapes, climates)

W

- Variability (surface, signage, quality)
- Length
- Challenging climates
- Elevation
- Distance from markets
- Accessibility by public transport
- Weak local cycling culture
- Population density
- Service density
- Cost of living (Norway)
- Eurovelo awareness

O

- Sustainability
- Health trends
- Nature expectations
- Growth in cycle tourism
- Growth in E-bikes
- 45-64 age demographic
- Concentrated market (France – Germany)
- Cross-border offers
- Baltic and North Sea cycle routes (top 10)

T

- Strong competition (long distance routes)
- Public not always cycling friendly
- E-bikes on planes
- Average cycling trip = 8 days/500 km
- Cyclists' habits: last minute/flexibility

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THE CYCLING MARKET

THE EUROVELO PRODUCT

THE COMPETITION

SWOT

STRATEGY

Don't forget!

- We have few strengths, but they are very strong … and a lot of weaknesses
- We have money now, we won't have tomorrow (or very little)
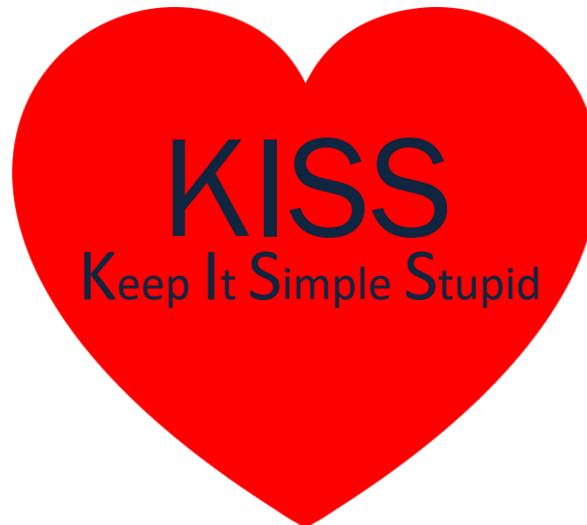
EuroVelo 1

Three levels of communication

- International
- National
- Regional and local

EuroVelo 1
Strong added value to local communication

- Integration into local cycle route marketing is a key issue
    - EUROPEAN AWARENESS
    - CROSS MARKETING BETWEEN EuroVelo 1 STAGES

- Invest in good quality infrastructure today and future maintenance will be cheap

SCENE

Atlantic/Ocean/Tides
Coast/Islands/Ports
Waves/Beaches/Salt
Cliff /Fjords/Moor

Nature/Environment
Wind/Rain/Storms
Heat/Cold
Birds/Wildlife

Celtic culture
Pubs-bars
Light/Colours/Contrasts
Megaliths

ACTIVITIES

Outdoor/Wide spaces

Sports
Bike, hike, swim, sail, climb

Adventure/Challenge

Zen

Nature watching

Disconnecting (day to day)
Reconnecting (self, family,
cultures, nature)

ATMOSPHERE

Wild/Secret/Isolated

Authentic/True/Simple
Strong/Intense/Invigorating

Resourcing/Sharing
Reunion/Warmth

Freedom
Safe

Position & Unique selling proposition

- EuroVelo 1: **Europe's ultimate wild frontier**

Promises

- Not just a holiday, an experience of a lifetime
- Experience the regenerating force of the Atlantic Ocean
- Unique Celtic and Scandinavian cultures
- Warm and vibrant city hubs
- So far, so different and yet so near
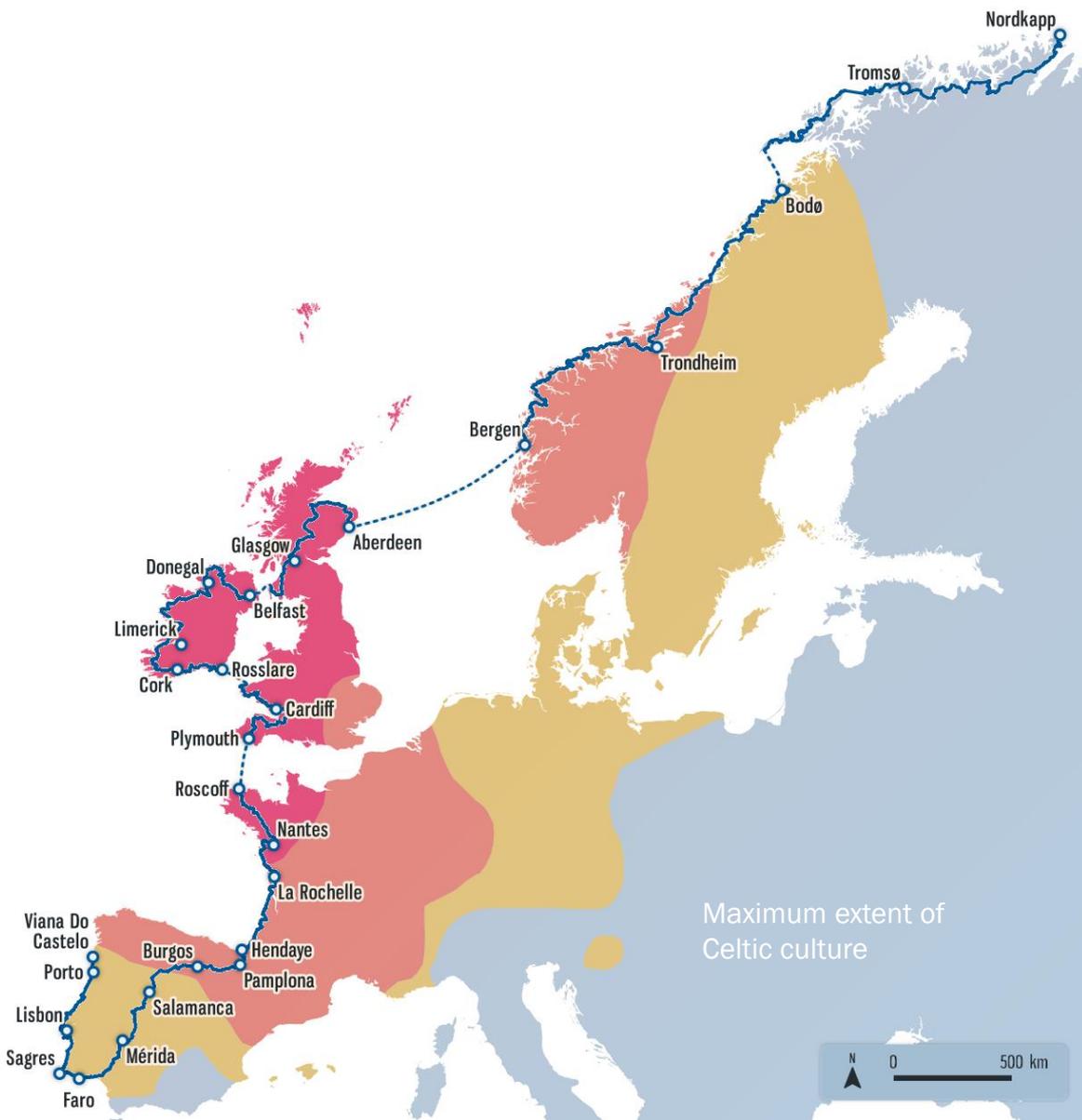
ALTIMAX

inddigo

EuroVelo 1

Experience the Celts' unique culture

EuroVelo 1

Experience the Celts' unique culture

EuroVelo 1

Experience Scandinavia's unique culture

ACT 4
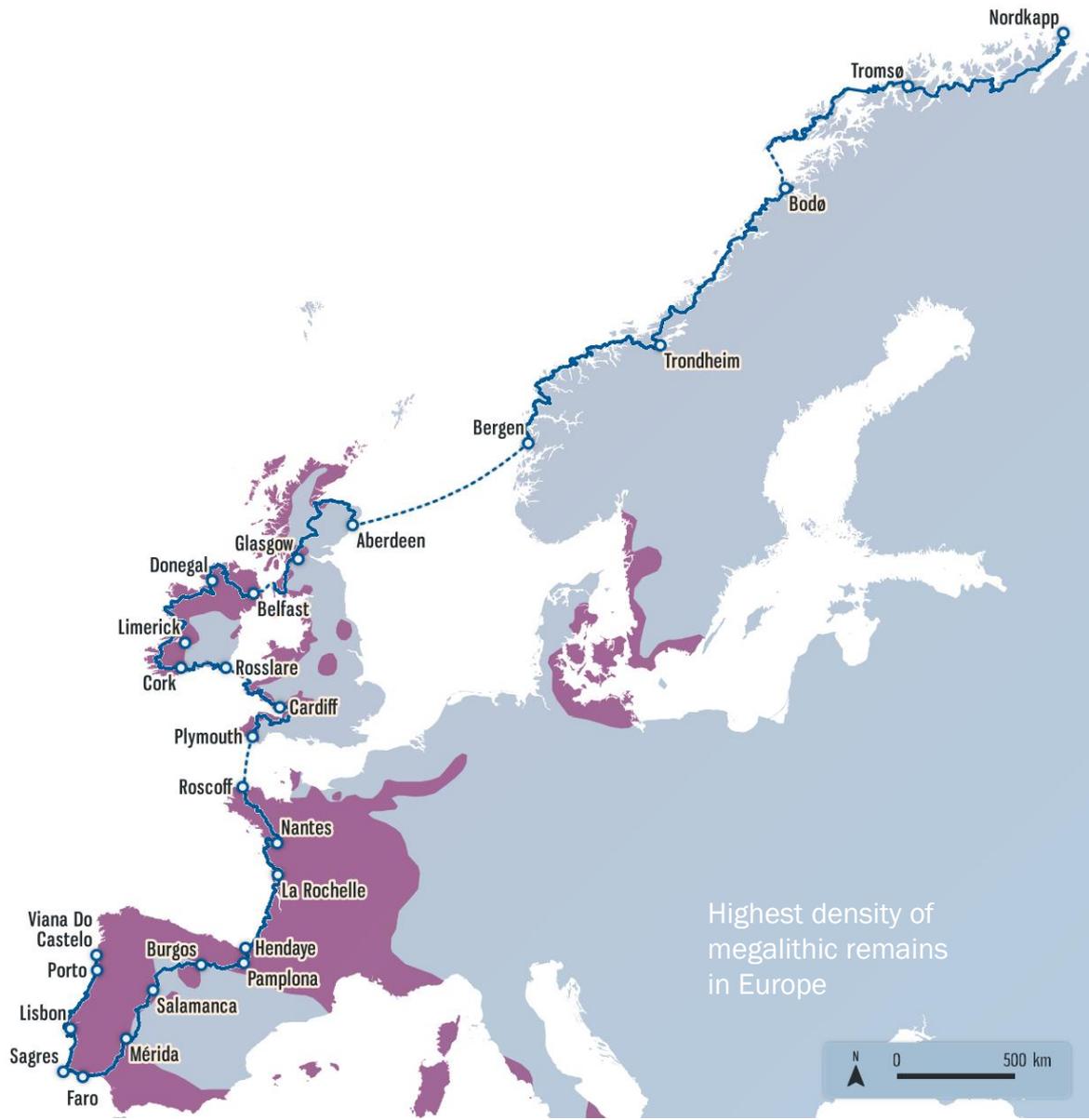
EuroVelo 1
Marketing targets

- Partners
- Local technicians, politicians, tourism organisations, accommodation providers, cycle shops, etc.
- International cycle tourism sector: tour operators, map and guidebook publishers, bloggers,

- … And then cycle tourists

Cyclist target groups: avoid a Jack of all trades strategy

- Long distance cyclists > 2 weeks and more
- Cyclists who have spare time
    - Young retired people (60/70) couples
    - Cyclists <30, single/couples/small groups
    - Seasonal workers single/couples
- Experienced cyclists, not families (except locally)
    - Adventure cyclists/warmshowers network

- International markets
    - Main European markets: Germany, Netherlands, Switzerland
- National markets to expand

Targets

YES

YES	**YES**	**YES**	**YES** / **NO**	**NO**
Very long distance	Light and fast	Gravel bikers	Families	Beginners

Overnight cyclists in France
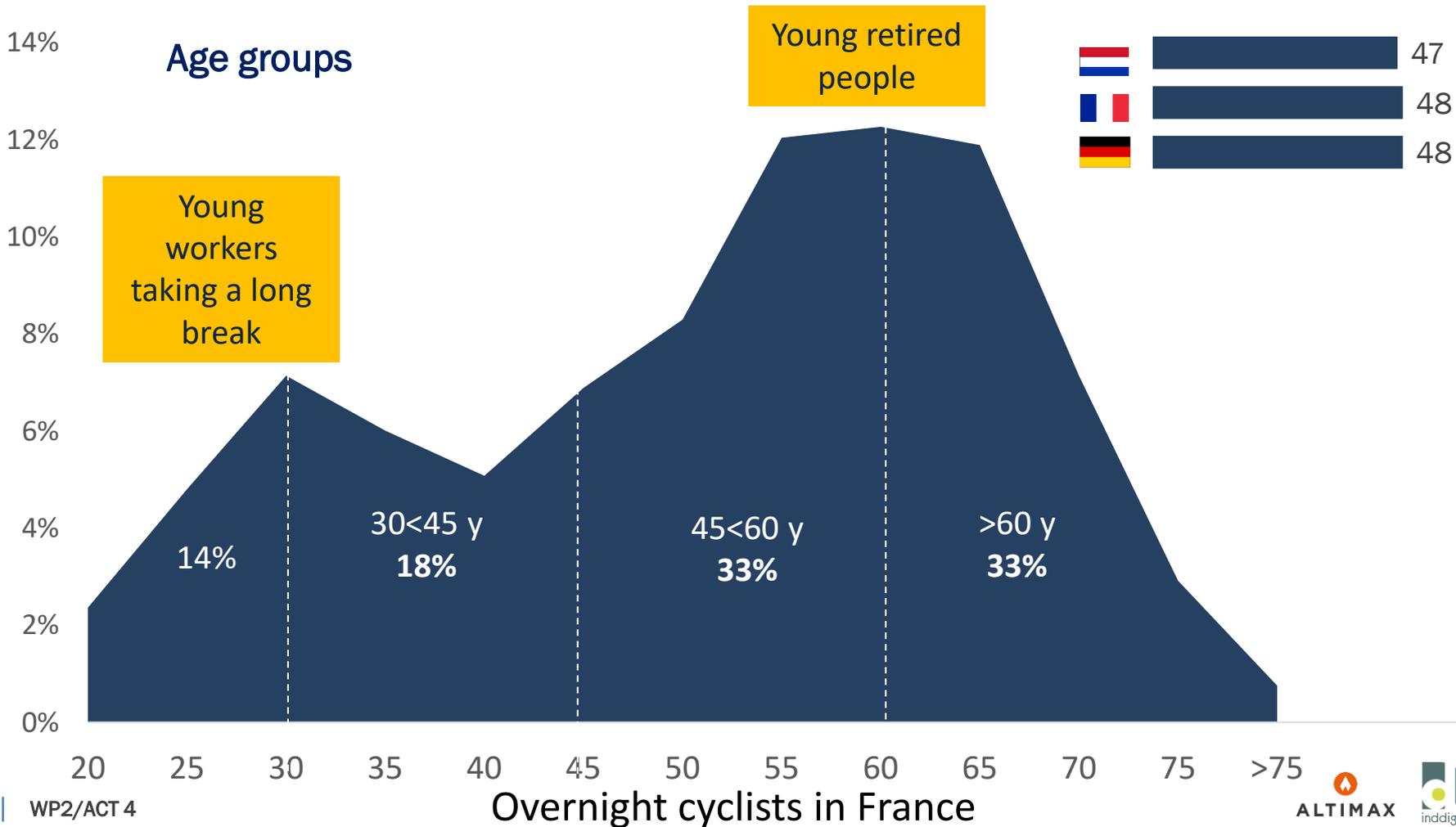
EuroVelo 1
Three levels of communication

- International
- National
- Regional and local

Brand name

Atlantic – Coast Route

Véloroute de l'Atlantique

Atlantikküsten Route

Bealach Cósta an Atlantaigh

EuroVelo

Brand name

Atlantic – Coast Route

Atlantic- North to South

Europe – North to South

Atlantic on bike

Brand name hierarchy

Atlantic on bike
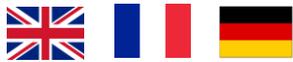
Atlantic on bike

Atlantic on bike

Brand name hierarchy

Atlantic on Bike

La Vélodyssée
by Atlantic on Bike

La Ruta de la Plata
by Atlantic on Bike

Baseline

Baseline

Baseline

Baseline

Baseline

Baseline

Baseline

Baseline

De Rijnfietsroute
Op de fiets Europa ontdekken

La Véloroute Rhin
Découvrir l'Europe à vélo

The Rhine Cycle Route
See Europe on a bike

Der Rheinradweg
Europa mit dem Rad erleben

Atlantic on bike
From North Cape to South Cape

Atlantic on bike
Du Cap Nord au Cap Sud

Atlantic on bike
Von Kap North bis Kap Süd

**Atlantic on bike**
Van Noordkaap to Zuid-Kaap
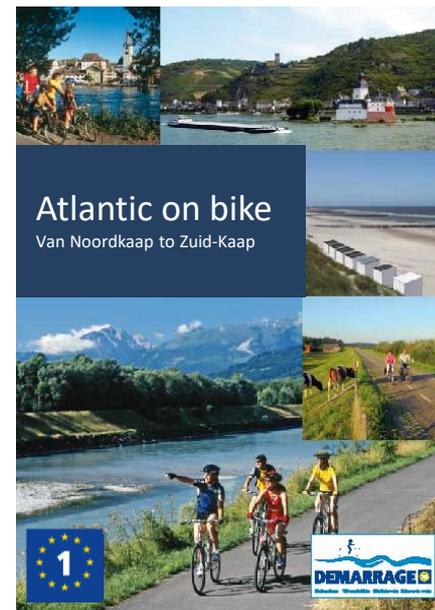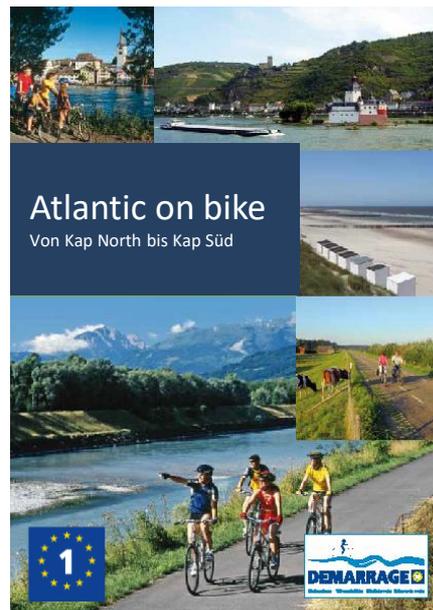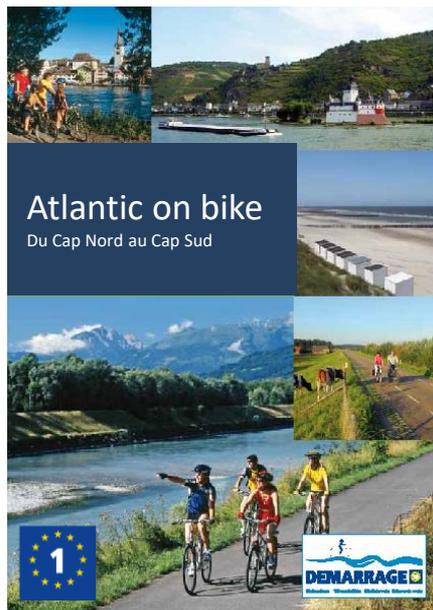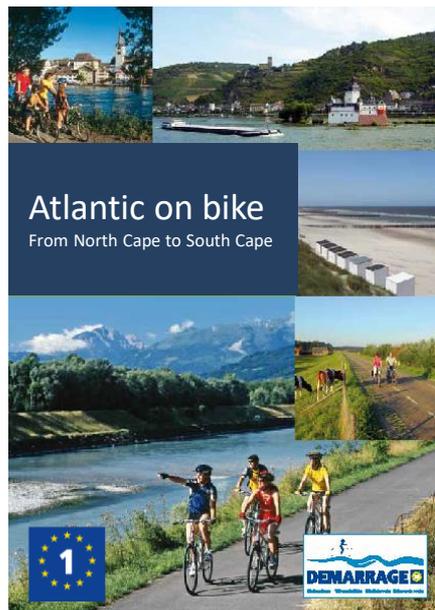
Marketing tools: 3 levels to amplify effects

Internal/Corporate
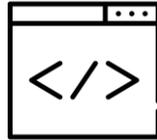
B to B level

B to C level
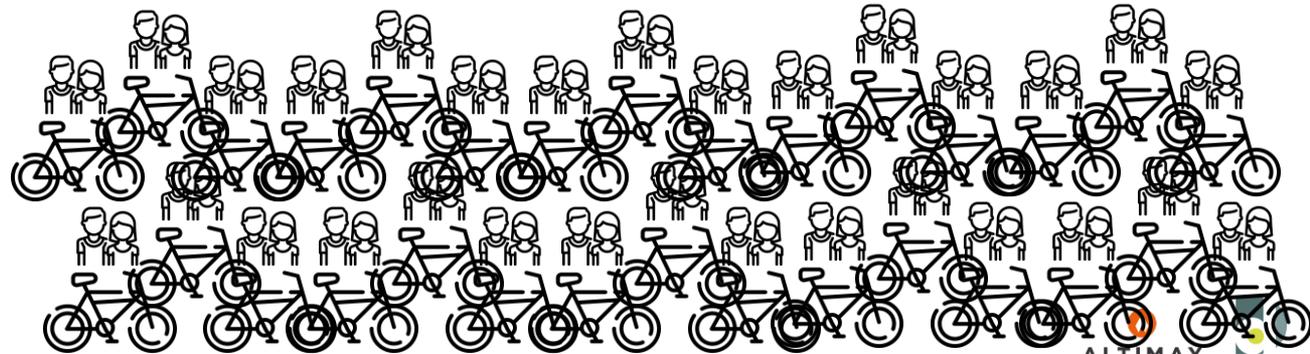
Internal/Corporate
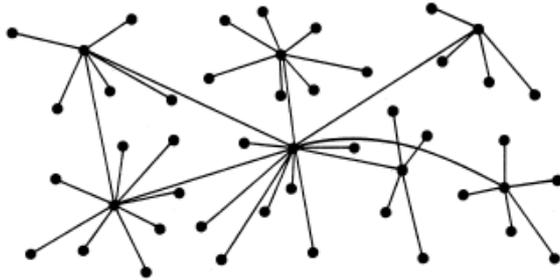
Marketing tools/Internal level

- Networking/Partners/Governance
    - 2 meetings/year
    - Infrastructures/Communication

- Extranet
    - Shared documents/pictures/logos
    - Shared planning

- Image bank (pictures/clips) free of copyright
    - Covering the full route
    - Qualitative (wilderness, POI)

- Corporate design manual
    - Integrating EuroVelo 1 communication into Regional Routes

B to B level
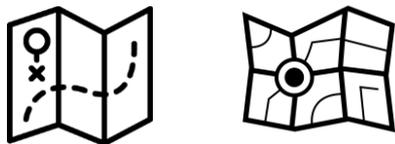
Marketing tools/B to B level

- **Specialised press and bloggers**
  - Identify influencers
  - Provide content (images/reports)
  - PR (launch event, eductours)

- **Guidebooks and maps**
  - Entire route published (EsterBauer, Huber)

- **EuroVelo route Certification**
  - Awareness
  - Visibility
 - Added value/attractiveness

EuroVelo 1
Already good guidebooks

North Cape route

Scotland

Dingle Peninsula

Vélodyssée

Camino Francès

Ruta de la Plata

Algarve
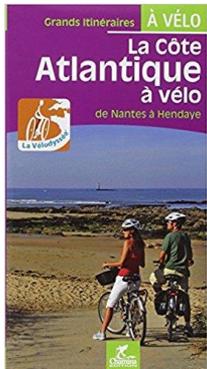
EuroVelo 1
Already package tours

🇩🇪 Germany	████████████████	16.0%
🇨🇭 Suisse	██	2.0%
🇫🇷 EV8	██	2.0
🇫🇷 EV6	█	1.3%
🇫🇷 EV1	▌	0.5%

North Cape route

Scotland

Dingle Peninsula

Vélodyssée

Camino Francès

Atlantic Coast

Algarve

Nordkapp
Tromsø
Bodø
Trondheim
Bergen
Aberdeen
Glasgow
Donegal
Belfast
Limerick
Rosslare
Cork
Cardiff
Plymouth
Roscoff
Nantes
La Rochelle
Viana Do Castelo
Burgos
Hendaye
Porto
Pamplona
Lisbon
Salamanca
Sagres
Mérida
Faro

500 km
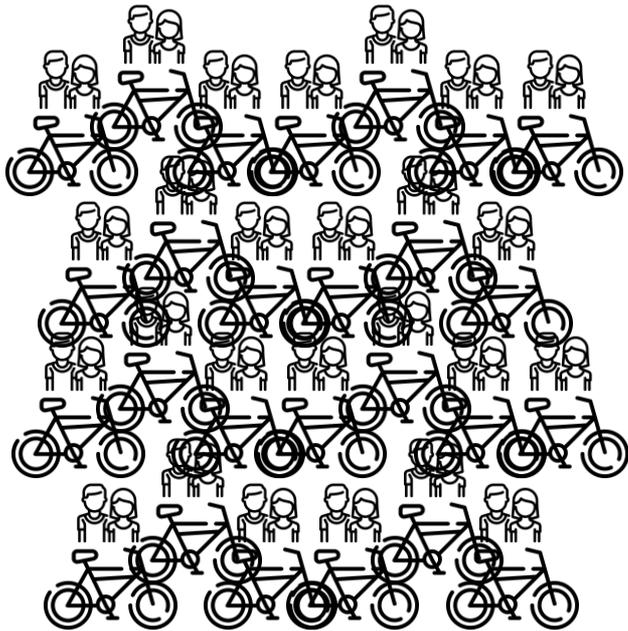
B to C level

Marketing tools/B to C level

- Web pages (integrated into the EuroVelo website) + App
    - Attractive (through images/reports)
    - Practical (sections, access, accomodation, climate, price level)

- Social media
    - Facebook, Youtube
    - Pinterest, Instagram

- Brochure
Specialist press, associations: editorial work

- Festivals, tradeshows, events

- Cross selling with national/local itineraries

THE CYCLING MARKET

THE EUROVELO PRODUCT

THE COMPETITION

SWOT

STRATEGY

NEXT STEPS

	Mar 18	Apr18	May18	June18	July18	Aug18	Sept18	Oct18	Nov18	Dec18
Meetings/Seminars		IRE			Stopover Mkg coord		Stopover Mkg coord	POR		
Audit (market, product, benchmark)										
Bulletin board (End users)										
Strategy										
Corporate design manual										
Marketing plan										

Validate/Steering Committee

- Audit – SWOT

- Strategy
    - Targets
    - Positioning/Values
    - Naming/Baseline
    - Communication levels

- Next steps
    - Replace focus groups by bulletin board
    - Planning

Homework/Marketing coordinators in each country

- List of POI + Characteristics
- Length of the route + Characteristics (road surface, traffic free, finished, signed EV1)
- List of major blogs + Guidebooks + Magazines + Influencers
- Potential contacts (e-mails) of cycle tourists who understand English

Homework/Marketing WP2-Act4 leader

- Brand registration
- URL registrations

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