The Economic Impact of Long Distance Cycle Routes
North Sea Cycle Route (NSCR)

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Summary

The authors refer to the development of long distance cycle routes during the past decade. While there has been a number of studies evaluating their potential and estimating levels of demand there is little hard data on users and suppliers on such routes and economic benefits that might accrue from their development.

It summarises work currently being undertaken as part of an ongoing research project into the level of impact generated by routes which have tourist potential. The North Sea Cycle Route, in northern Europe, is discussed as an example. The paper, however, also refers to business confidence generated by such routes and how this might be measured. To what extent do routes attract new businesses, increase profits of existing businesses or help marginal businesses to survive? This research seeks to offer a response to this question.

The authors conclude by setting out a research method for the North Sea Cycle Route, which could be used by route managers to evaluate existing and future business development on such routes. It also points out the necessity of comparing social and environmental impacts of small villages and towns on such routes. A comparative approach across routes would provide useful data for planning the development of networks in the future.

Introduction

Throughout the past decade there have been a number of proposals which encourage the development of long distance cycle routes such as La Route Verte in Canada, Millennium trails in the USA, EuroVelo in Europe and trails being planned in Australasia. Long distance cycle routes tend to be been planned as transport systems, but they are also tourism attractions in that they have local, national and in some instances international appeal for cycle tourism. One of the major issues yet to be explored in any detail is the level of expected use of such linear long distance routes and the likely economic, social and environment impacts that these will have in the short, medium and long term Rails to Trails Conservancy, 1998). There is simply insufficient information available to begin any serious forecasting of demand.

Therefore researchers tend to build scenarios of use based on case studies of shorter routes such as the Donauradweg in Austria and the C2C route in the UK where there are historical data of cycle tourists (Cope *et al*, 1998). The assumption is that these routes are typical. Work undertaken on the Veloland Schweiz network (Richardson, 1999) and La Route Verte (Couture, *et al*, 1995) provide good a useful framework of analysis on which to develop more detailed research.

The North Sea Cycle Route (NSCR) is a 5500km route circling the North Sea(1). An integral part of the route is the local and international ferries which link the countries involved, namely, Denmark, England, Germany, Norway, Scotland, Sweden and The Netherlands. This is a major project organised by local and regional authorities along the route. It makes use of existing national or regional cycling routes already established, although there are links yet to be implemented in some countries so that there is continuity throughout. The project is part-funded by each respective local governments and the European Union INTERREG IIC programme (Interreg IIC Community Initiative concerning Transnational C-operation on Spatial Planning 1998-2001). The project is managed by an International Management Group (IMG) of which Rogaland fylkeskommune, Norway, is the lead partner and provides a secretariat.

One key element of the project is a monitoring programme. This will enable the IMG to measure and evaluate outcomes in relation to the original objectives as the NSCR is developed. This paper outlines a monitoring strategy aimed at this long distance route, The North Sea Cycle Route (NSCR).The next section outlines the general thrust of the research strategy and identifies indicators, which might be of importance in evaluating the impact of the NSCR. The subsequent section reviews methods of analysis that will be employed.

There are four key research tasks outlined in *North Sea Cycle Route: Research Programme,* April 1999:

1. Measure Business Development
2. Measure the level of use
3. Determine User Profiles and Spending
4. Trans-national Co-operation and Spatial Planning

The first three are discussed in this paper.

Research Strategy

Earlier documentation concerning the evaluation of the NSCR indicated that

> "The thrust of the research strategy will be to establish and trial research methods which will measure impacts attributable to the introduction of a long distance cycle route."
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> [North Sea Cycle Route:Programme of Research, April 1999]

The impact indicators identified for the NSCR, which will be the target outcomes of this strategy, have been identified as:

A) The number of participants on the opening ride
B) The number of cyclists using the route
C) The level of use of other routes linked to the NSCR
D) The level of use of associated passenger transport network
E) Sales of information packs and merchandising
F) Level of spend in communities on the route
G) Number of jobs retained and generated by NSCR
H) Number and range of products which incorporate the NSCR

This list of targets implies the need to identify and obtain a number of types of information:

- On the one hand, simple counts of cyclists using the route need to be established as, for example, indicated in indicator B.
- Secondly , the need to profile users of the route in terms of attitudes, lifestyle and socio-economic background is implied in, for example indicator F. Previous studies of cycle tourism provide some guidance on this aspect. The research for this project will be to verify the type of existing user profiles and whether NSCR generates a "new" market segment(s).
- Thirdly, previous studies have identified spending to be statistically associated with visitor profile factors. In addition the novelty of the NSCR implies that there is a need for primary research. The methods utilised tend to measure spending, itemised in some cases to the different supply sectors such as accommodation, transport, etc. There have been very few attempts to model the data to produce a generalised model of spending for this type of activity. The models that have been adopted in the past have used the well-established input-output multiplier model. The best example of this is La Route verte in Quebec.

- Finally, measuring spending, for example, in order to assess the level of employment attributable to a route, has been considered by a few studies. In terms of this research programme it will require information from both users of the route and businesses affected by the route.

Research Methods:

General Outline

The wide-ranging scope of the research issues involved indicates that no-one single research technique will adequately provide all of the relevant information. Consequently the research method employed will involve triangulating quantitative questionnaire responses with information from qualitative interviews of both users and businesses associated with the NSCR as well as simple counts of use. This in turn will be compared to previous studies of cycle routes. Triangulation is therefore a useful technique where data is limited, as it allows verification of results by comparison and analogy. In this respect detailed understanding of the users and their impact on businesses and the local economy can be obtained, but at the same time sensible bases of generalising these profiles exists.

Given the novel features of the NSCR, the research method will also involve triangulation of the sampling frames. The traditional sampling frame for the analysis of the economic impact of tourism development is usually confined to closely defined geographical centres of 'gravity' within which leakages from and injections to the 'local economy' can be defined.

In contrast the NSCR, is not a regional destination, it is linear by nature. An additional unique feature is its international character. Thus in various countries, the NSCR will comprise a 'necklace' of centres of gravity, interspersed with smaller localities which offer some attraction and accommodation en route. In this respect, it is proposed to take a representative section of the NSCR, in at least two countries, and develop the research methods as a pilot (test) before applying them elsewhere on the route.

It is therefore planned that a test survey (pilot) will be undertaken in two countries on the route this summer, in the UK and Norway. It will be necessary to sample users and tourism service providers from two major ports as centres of gravity and a small settlement half way between these cities. In the UK, Hull and Newcastle will be the proposed centres' of gravity. In Norway, Stavanger and Egersund are proposed.

Flows of usage of the NSCR will be monitored both into and out of these centres. This implies that at least 6 counters will be required to monitor the flow of cyclists into and out of these centres as well as 6 survey sites for examining cyclist profiles and spend. The importance of sampling a small locality between the larger centres reflects the fact that previous surveys indicate that long-distance or specialist cyclists will form a small proportion of overall users of cycle routes. The small settlement, being situated well away from the major cities, will increase the chance of obtaining data on this type of cyclist. This will be compared to what will probably be predominantly "day-excursion" and "short break" cyclists associated with larger centres of population and transport, particularly ferry access to the route.

Survey Methods

It is important to point out that this initial survey will only provide a "snapshot" of the NSCR at six points which are considered to be "representative" of the entire route. However, over time monitoring will produce an understanding of the changing nature and impact of the route.

It is proposed to sample users randomly. Thus to control for response bias, each user stopped will be asked a series of short questions to yield basic profiling data. Consequently, cycle tourists will be given a questionnaire (a holiday travel diary) to complete at the end of their journey. In particular the questionnaire will probe details of what the cyclist has done while on holiday and the level of spending associated with this activity. The responses for this enquiry can then be checked against the details of the initial survey. It is proposed that the questions will be targeted at the travelling 'group'. Experience of previous research suggests that tourism is consumed mainly at the group level. Thus group composition needs to be explored and linked to spend and other activities.

Because of the likely complexity of tourism supply sector in the large centres, coupled with the likely small overall demand made upon it by cycle tourism, it is proposed to interview tourism officers. In the smaller towns, interviews of tourism providers (accommodation, inns, shops) will be undertaken. It is this area of research which is lacking to date. The proposed research will seek to measure levels of knowledge, interest and commercial development or otherwise as the route develops.

It is important to note that while a degree of comparability between the UK and Norway is sought in the above research process, by identifying two countries that differ in their geography, climate and potential lifestyle (because of demographic differences), useful information on the broader nature of the users and suppliers on the route will be identified. Triangulating the results will be integral to providing a sensible benchmark from which a thorough evaluation of the route can begin.

Conclusions

The first stage of the project will be to test a research method. The expected outcomes are likely to be different in relation to centres of gravity, such as major cities on the route, and very rural towns/villages and between countries. The research will investigate the difference and similarities of the market at these points and the significance of the economic impact to different sizes of communities in the various countries.

It would be possible, depending on resources, to use the research method, once it is tested, on other sections of the NSCR to build a more accurate picture in 2001 when the route is formally launched. Previous studies have provided detailed information about cycle tourists (Countryside Commission, 1995). However, in terms of route development the supply sector is also critical. It is therefore likely that researchers will devote more time to discussing the attitudes of tourism officials, tour operators and businesses en route. The emphasis of the research on the NSCR will include in depth discussions with small businesses. This is especially relevant in the rural sections of the long distance route where additional numbers of visitors will bring much needed revenue into local economies. However, unless tourism businesses are receptive to new visitors, this will hold back development.

It would also be useful to establish case studies of small towns and villages so that social and environmental impacts can be monitoring from an early stage of development as well as economic impacts. While the life cycle concept has been extensively discussed in relation to resorts, there has been little work on its applicability within the context of linear recreational routes. This will enable researchers and managers to plan the development of routes and the marketing of them in line with expected visitation over time (Getz, 1986).

Finally, one of the major problems to date has been that most studies have focused on one particular research task. For example, one survey will reveal consumer profiles of users, another will evaluate the level of spending. It would be useful to provide a template of survey method and questions to include for each survey to be conducted on long distance routes. This would enable researchers to compare results more easily as at present this is not possible.

There have been a number of attempts to map out a path towards sustainable transport development (Davis,1991). What is being increasingly recognised in more affluent economies is that transport for recreation and tourism is still in growth. In developing economies it has, in contrast, barely commenced. Thus, there is a continual need to address this sector, i.e. where transport meets tourism, as well as utility trips. The research findings from the North Sea Cycle Route will help our understanding of the relationship between transport and tourism in this planning process.

Notes

1. See www.northsea-cycle.com

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