



**MARCH 2007**

**A STRATEGY  
FOR THE DEVELOPMENT OF IRISH CYCLE TOURISM  
CONCLUSIONS REPORT**

**NEW EXECUTIVE SUMMARY**



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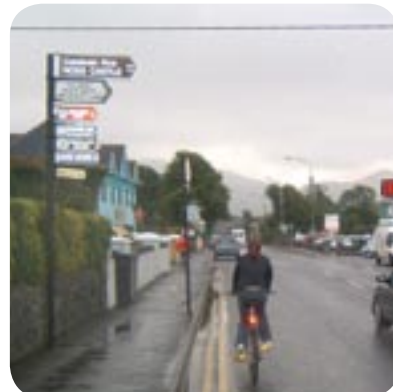
# 01 The Challenge Facing Irish Cycle Tourism

## 1.1 Cycle Visitor Numbers and Satisfaction Ratings

Cycle tourism is in decline in Ireland. In 2000 the number of overseas participants in cycling stood at 130,000. By 2004 this number had dropped to 85,000 and by 2005 it had fallen by a further 25,000. While there was a very slight increase in cycle tourism numbers in 2006, this increase was less than the increase in walking tourism numbers and the satisfaction ratings for the product continued to decline. Satisfaction with the quality of the product is also being eroded with the percentage of very satisfied holiday makers falling from 76% in 2000 to 50% in 2005 and unsatisfied customers rising from 2% to 9% over the same period. Despite the decline, overseas visitors who cycled while in Ireland contributed an estimated 34.5 million Euro to the economy in 2005.

While it is difficult to pinpoint the precise causes of the decline, a research project specifically designed to elicit both quantitative and qualitative information on the cycling product was conducted by MORI in 2005. It found that;

- Cycling on Irish roads is not perceived to be safe – cyclists face dangerous bends, fast cars, intimidating HGVs, more traffic and higher speeds;
- There are very few, if any, traffic-free routes to cater for touring cyclists wanting to leave the cities to discover the countryside or for families who wish to participate in cycling;
- Airlines and ferry companies do not make it easy to carry bikes, there is no evidence of a coherent network, much less one that is linked to a reliable public transport system;
- Compared with other European destinations, the system and facilities in Ireland for the carriage of bikes on trains is poor and cycle parking facilities at many train stations are inadequate;
- The lack of good quality, strategically located, professionally run bicycle and accessory hire facilities is a key constraint.



When we look to Ireland's competitor destinations we discover evidence of an increasing demand for cycle tourism, with clear indications that this demand is being converted into tangible economic benefit for local and regional economies. There is also a growing recognition that there are motivational links between health and recreational cycling, which also have an impact on the demand

for cycling and walking within the tourism sector. Cycle tourism is a growing niche market. It can stand alone or support other markets. It has the potential not only to make an active contribution towards the economic revitalisation of rural areas but also to improve the quality of life for people locally.

## The Mori Survey

This two-stage project involved 13 in-depth interviews with cycling tour operators and 6 in-depth interviews with journalists in key markets. A second stage of research involved a quantitative survey of some 764 Irish and overseas holidaymakers. Fieldwork took place between the 14th of July and the 11th of September 2005. Key recommendations included;

- Develop a designated cycling network around the country.
- Design the routes around particular themes, like the Wine Tour in France.
- Improve cycle routes with better signposting, better road surfaces and greater safety for the cyclist.
- Vary the Irish cycling product and spread the network to take in places like Sligo, Donegal and the Wicklow mountains.
- Sort out adequate supporting public transport to help cyclists travel more extensively.
- Work together to provide safe, clearly marked, well signed routes.



## 1.2 The Response

In response to this challenge the “Strategy for the Development of Irish Cycle Tourism” has been developed to determine how best to renew the popularity of cycling in Ireland, how to encourage visitors to come to cycle in Ireland, and how to ensure that cycle tourism can generate visitor spend in rural areas. This strategy forms a subset of the Fáilte Ireland Tourism Product Development Strategy within the NDP. It focuses on a number of areas within the destination with particularly high potential for holiday cycling, and describes various measures to make them attractive to both domestic and overseas visitors. It also suggests the development of some longer more challenging routes and sketches out the framework for a National Cycle Network.

This initiative is concerned with developing, enhancing and promoting the cycle tourism product as a key component of Ireland’s product portfolio, the development of which will facilitate the growth of a spatially balanced and sustainable tourism economy.

The development of cycle tourism presents a particular opportunity to bring the economic benefits of tourism to the rural areas of Ireland. Cyclists enjoy the outdoor rural environment, they stay longer in an area, and since they cannot carry much in the way of provisions on their bikes, they need to shop locally and regularly thus benefiting local providers.



The existing Táin Trail route following the N61 is much busier than the quieter recommended alternative along back roads

02





## 02 What does the Competition look like?

### 2.1 The Increasing Demand for Cycle Tourism

When we look to Ireland's competitor destinations we discover evidence of an increasing demand for cycle tourism with clear indications that this demand is being converted into tangible economic benefit for local and regional economies. There is also a growing recognition that there are motivational links between health and recreational cycling, which also have an impact on the demand for cycling and walking within the tourism sector. Cycle tourism is a growing niche market. It can stand alone or support other markets. It has the potential not only to make an active contribution towards the economic revitalisation of rural areas but also to improve the quality of life for people locally.

#### Cycling as a tourism activity

- In France, where some 15% of the French population cycles for leisure, 4.7 million participate in half-day excursions, while 2.4 million participate in half-day excursions for an average of 10 days per year;
- In Denmark some 53,000 cycle tourists visit the Islands of Fyn and Bornholm and account for 477,000 bed nights;
- Some 22% of all Dutch cycle during their holiday, along with 21% of Germans and 6% of Swedes;
- In Britain some 2% of all leisure day trips (71.4 million trips) included mountain biking or cycling as a main activity. A further 25 million day trips involved people using their bike as a main means of transport;



## Veloland Schweiz - Switzerland

The network comprises nine routes across Switzerland. The routes offer a combination of off-road and very lightly trafficked quiet roads. In 1998, its first year of operation, there were an estimated 3 million trips on the Veloland Schweiz network with a total expenditure accruing from the network of some 100 million Swiss Francs (or approximately 63 million Euro). The average level of spending per day per capita by holiday cyclists was 121 SF, short breaks 89 SF, day trippers, 21SF

There are bicycle hire outlets at railway stations and a bike can be hired at one station and dropped off at another thereby providing maximum flexibility. The railway has become a key partner in developing cycle tourism.

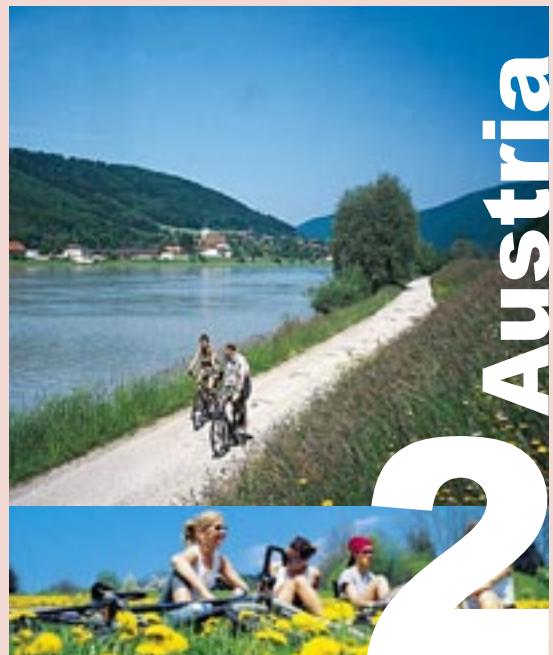
Estimates provided by the Veloland Schweiz office indicate that the initial 10 million Swiss Franc (6.3 million euro) invested in the 3,300-kilometre network has been returned within the first 2-3 years of opening of the network.



## The Danube Cycle Path - Austria

The Danube Cycle Path is probably Europe's most popular and successful themed cycle route. It is estimated that it attracts in the region of some 1.2 million trips annually. It has matured into a major international tourist product. The Danube Cycle Path is only one of 23 regional, themed routes established throughout the whole of Austria,

The route runs for 278 kilometres along the Danube from Passau, on the German border to Vienna, along a dedicated cycle way, with dedicated ferry crossings, through the historic towns of Melk and Krems, passing castles and vineyards. The appeal of the route lies as much in its rich cultural associations as in the outstanding quality of the landscape, and the fact that for its 278 kilometres it is almost entirely off-road. The Danube route has become the key route from which a series of small networks has been developed. These routes are being built under the banner of 'Sanften Tourismus' or environmentally sensitive tourism.



## The C2C Cycle Route Britain

The C2C is the UK's pioneering long-distance challenge route. It runs for 140 miles on minor roads and traffic-free cycle paths through Cumbria and Northumbria, from the Irish Sea in the west to the North Sea in the east.

The route is viewed very positively by businesses in the route corridor. Cycle shops and bed and breakfast operators made the biggest gains, with a third of the latter estimating that the C2C had increased their visitor numbers by in excess of 20 per cent with some putting the rise in business at closer to 100 per cent.

Now over ten years old, C2C illustrates the value of such a route to local businesses, the changing dynamics of a maturing product which can accommodate a range of user profiles and holiday options whilst retaining the potential both for further improvement and development.



## The Kingfisher Trail An Existing Signed Cycle Route in Ireland

Primarily based in the Fermanagh and Leitrim lakelands, the Kingfisher Trail brings the cyclist to historic monuments and attractive landmarks. It loops around lakes and islands, winds by rivers and streams, and passes through woods and forest and country parks. The cyclist will travel to scenic viewpoints as well as down rustic village streets. It includes over 300 miles of trail and is suitable for cyclists of all levels. New loops were added in 2005 to allow for shorter "Out & Back" tours — ranging from 1 day upwards. The Kingfisher Trail can offer advice on all-in packages or the cyclist can also choose Semi-Independent Tours where only the first and last nights' accommodation is pre-booked. For the rest of those tours, the cyclist can chart his or her own course using the Kingfisher Accommodation Guide. For those who prefer total freedom, the Kingfisher Independent option offers the cyclist the opportunity to go as her or she pleases by purchasing the Kingfisher Trail Map and Accommodation Guide. Details at <http://www.cycletoursireland.com/>



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## 03 What needs to be done

### 3.1 Why develop a strategy for cycle tourism?

Of particular significance is the need to address the imbalance in the development of the visitor economy and the associated need to engage in long-term planning for the development of rural areas. Total earnings from Irish tourism in 2005 amounted to €5.3 billion, an increase of €200 million on 2004. While the number of tourists traveling to urban centres including Dublin, Limerick, Kilkenny, Waterford and Galway increased, visitors to rural areas continued to decline.

A recent report commissioned by Ireland West Tourism, which has responsibility for counties Galway, Mayo and Roscommon indicates that the numbers of overseas visitors to the region have fallen by some 12% since 2003. The economic contribution of tourism to the western economy is such that it accounts for 7.6% of gross added value in the region compared to 2.8% gross added value in Dublin. Tourism-related employment accounts for 5.4% of the workforce in the west compared to 3% in Dublin.

A report commissioned by the Tourism Industry Confederation shows that weaker regions, where tourism is of greater economic importance, are in danger of being eclipsed by stronger regional destinations. In 2003, Dublin absorbed almost a third of the national tourism spend, with the South-East and Midlands-East regions increasing their market share. While total bed-nights have increased in Dublin by 41% in the last five years, occupancy rates have fallen by 21% in the west and northwest and by 39% in the Shannon region. Even within these areas, tourism tends to be concentrated on the urban centres of Galway, Westport and Limerick.

There is evidence that the potential of the countryside as a visitor destination and wealth generator is not being realised. The West appears to be failing to exploit its natural advantage as an ideal location for activity-based holidays. Given the uncertainty that surrounds the future of small-scale farming, many are looking to the tourism sector to provide a greater economic contribution. Many commentators would argue that there is a case for skewing tourism investment towards the west and proactively supporting the development of rural-based activity holidays. This would be seen as helping to reverse the trend towards the urbanisation of the tourism industry by rekindling tourism as a vibrant rural phenomenon driving small businesses.

The tourism sector is undergoing rapid change. Traditional B&B accommodation is finding it hard to compete against low-cost hotel rooms. Such businesses along with on-farm accommodation are seeking ways to reposition themselves in the market place and offer visitors close-up, personal experiences of the natural attributes and assets of the destination. Nine out of ten visitors specify 'beautiful scenery' and 'natural unspoilt environment' as their main reasons for coming here. All the more reason then to ensure that measures are introduced and infrastructure developed that will not only safeguard this resource for the benefit of tourism, but will also facilitate its dynamic use to create local wealth and employment.



## What are the main types of Cycle Tourism?

*Cycling Holidays:* these are defined as holidays, by both domestic and overseas visitors, where cycling is the main purpose of the holiday. Participants are usually referred to as ‘dedicated cyclists’. The holidays taken may be “Long Cycling Holidays” of four or more nights or more commonly “Cycling Short Breaks” of one to three nights. A distinction also needs to be made between “Centre-based Cycling Holidays” based on a single overnight location and “Cycling Touring Holidays” where the overnight stay changes. Cycling holidays can be either self-organised, or organised by a cycling holiday operator.

*Holiday Cycling:* this involves participating in cycling while on holiday and comprises day cycle rides taken by both domestic and overseas visitors while on holiday away from home. Cycling, in this instance, is one of a number of activities undertaken during the holiday.

*Cycling Day Visits:* these are defined as trips from home to places outside a person’s usual place of residence. These trips may involve setting out from home by bike, or taking the bike by car, train or bus for a day- or half-day cycle ride.

While there are other types of cycling such as mountain biking, club cycling, organised cycle rides and cycle racing that may have a tourism dimension, these are not the focus of this assignment. However, it is recommended that in future phases of this project, further attention is paid to the potential of these sub-sets of the wider cycling sphere.

### 3.2 What are the benefits?

The appeal of cycle tourism lies in its capacity to provide a tourism experience that visitors desire, such as offering a challenge or an overall feeling of relaxation and well-being. We see an increasing number of European countries such as Britain, the Netherlands, France, Germany, Austria, The Czech Republic and Switzerland as well as North American countries paying close attention to cycling as a tourism activity. These destinations are currently developing cycle tourism infrastructure including the provision of dedicated cycling routes. Such initiatives have increased cycle tourism related traffic and hence potential economic development opportunities for rural areas in close proximity to the routes. This has been achieved both through the creation of new infrastructure as well as, importantly, the maintenance of existing infrastructure and services. The lesson learned from the early stages of the UK National Cycle Network and other schemes such as La Route Verte in Canada and the German, Dutch and Swiss national cycle networks is that an improved infrastructure can generate a substantial demand.



While firmly couched within the agenda for the development of tourism, it is important to recognise the extent to which this initiative also addresses a range of other government priorities such as:

- Sustainable transport – cycling can reduce the number of trips made by cars, thereby improving local air quality, decreasing the amount of greenhouse gas (GHG) emissions, and decreasing the use of finite fossil fuels;
- Improved mental and physical health of the populations – regular physical exercise is required in order to maintain a healthy weight and properly functioning body. Cycling commuting / leisure riding is now recognized as an important element in strategies to improve public health. UK and continental based studies indicate that health benefits of cycling far outweigh the associated risks;
- Improved quality of life in urban and town environments – Transferring commuters from cars to bicycles improves the urban / town environment in terms of noise, road safety, and general atmosphere. I.e. The environment becomes less threatening and therefore a more attractive place in which citizens can relax, chat, shop and spend time;
- Regional and small local economic development – cycle tourists stay longer and have more time to spend their money in the local community which is of particular advantage to the rural community.







### Further Benefits

- Cycle tourists represent a growing and valuable market segment, particularly for rural areas. Cycle tourists will spend at least as much as other visitors in a rural area;
- Cycle tourism is good at generating local trade and offers particular opportunities for rural businesses and services. Spending by cycle tourists helps to support rural pubs, village shops, small-scale rural attractions and rurally based providers of accommodation;
- It offers opportunities for the development of cycle hire and cycling holiday operations in rural areas;
- As cycle tourists will use local businesses there is a greater likelihood that the money they spend will stay in the local economy;
- Cycle tourism is an environmentally sustainable form of tourism with minimal impact on the environment and host communities. This is increasingly important as we aim to reduce CO2 emissions and reduce global warming;
- It makes good use of existing, often under-utilised resources for example country lanes and by-roads;
- It can provide an alternative use for redundant or derelict resources, for example disused railway lines;
- Cycle tourism can provide new incentives for people to visit an area and can help to attract new types of visitor;
- Cycling can provide an added attraction and activity as part of a multiactivity holiday for visitors, which will help to extend length of stay and encourage repeat visits;
- Encouraging cycle tourism can help to encourage utility cycling as people may rediscover cycling while on holiday and may then be encouraged to cycle more frequently for other purposes;
- Cycle tourism enhances personal health, fitness and well-being.

04



# 04 Developing the Infrastructure

## 4.1 The Range of Interventions

The interventions that are required to transform Ireland into a competitive and appealing cycle tourism destination are manifold. Broadly speaking, they can be divided into infrastructural elements and “softer” measures. The former includes changes to the road network so as to make the cycling experience safer and more attractive, dramatically improving cycle hire facilities and services as well as improving the integration between cycling and public transport. Softer measures include the range of tools that can be deployed to effectively profile, market and promote the destination to prospective cycle tourists including maps and website.

The original study area included the entire South, West and North West of Ireland together with other specific destinations such as the Shannon Region. The extended study area included the East Coast and Midlands Region. Given the broad geographical scope of the assignment it was necessary to divide the study area into its constituent regions each having its own identity and forming a natural area capable of being explored during the course of a week’s holiday. Dedicated and detailed reports have been prepared for each of the regions as follows:

- The North West**
- The West**
- Shannon**
- Cork – Kerry**
- The South East**
- East Coast and Midlands**

### What Do Cycle Tourists Need?

- Safe places to cycle and consideration from other road users;
- Attractive routes with good scenery;
- Well-connected and signposted routes and destinations avoiding long detours;
- Opportunities to visit local attractions and specific places of interest;
- Food, accommodation and refreshments available at intervals, which reflect comfortable distances for stopping off / overnight stops;
- Accessible maintenance and repair facilities;
- Routes to be promoted on maps;
- Easy access to alternative cycle-friendly modes of transport;
- Website including route planner facility.

## 4.2 The Cycle Network - Gateways, Cycle Hub Towns and Cycle Routes

In order to determine the specific interventions required, criteria were established for the identification of a network comprising Gateways, Cycle Hub Towns and Cycle Routes.

### 4.2.1 Cycling Gateways

Cycling Gateways in this study are simply defined as those entry points to the country for visitors from abroad. They consist of airports and ports. A total of thirteen gateways are identified, as shown on the “Irish Cycle Network” map on the following page.

These are:

- Dublin Airport
- Dublin Port
- Dun Laoghaire Port
- Rosslare Port

- Waterford Regional Airport
- Cork / Ringaskiddy Port
- Cork Airport
- Kerry Airport (Farranfore)
- Shannon Airport
- Galway Airport
- Ireland West Airport
- Sligo Airport
- Donegal Airport

It is essential for the gateways to be welcome places for cyclists. This is especially true for Dublin Airport – the most important entry point to Ireland. Ferries and airlines should have clear policies on how to accommodate cyclists and ensure safe passage of the bike. On leaving the terminal or airport, high quality, attractive, well-signed cycle routes should be in place, seamlessly linking the transport terminal to the wider cycle network.

### Criteria Used in Deciding on

### “Cycling Hub” or “Potential Cycling Hub” Designation for a Town /City

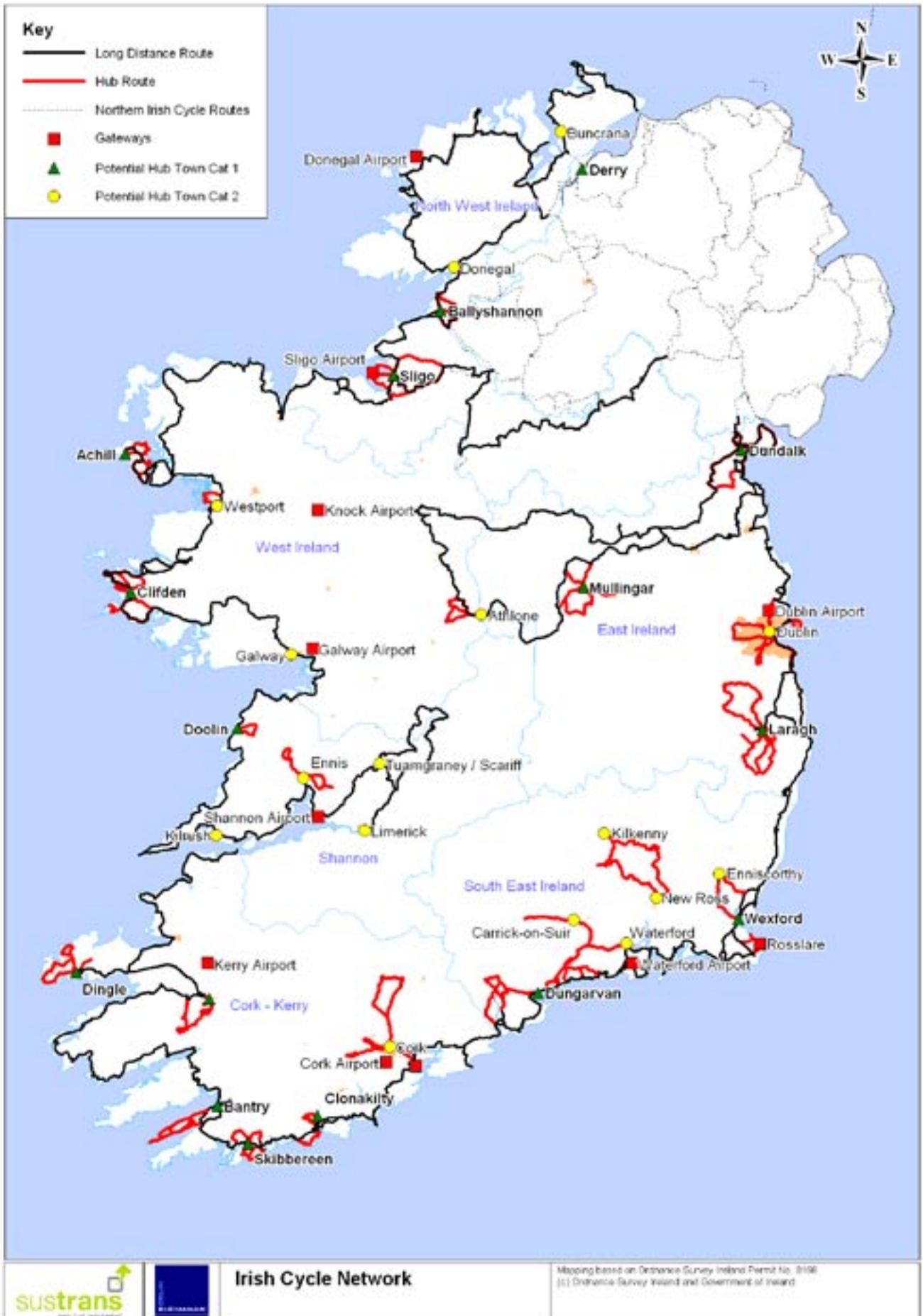
	(1) Attractive Destination in Its Own Right	(2) Accessible by Public Transport (ideally by rail)	(3) Plentiful Tourist Accommodation	(4) Attractive and Safe Cycling Routes	(5) Signed Routes	(6) Route Maps	(7) Bicycle Hire/Repair Services/ Supportive Community
Cycling Hub	A Given	Essential	Essential, ideally with bicycle-friendly accommodation	Essential	Essential	Essential	Essential
Potential Cycling Hub	A Given	Essential	Essential, ideally with bicycle-friendly accommodation	Essential, (but work can be done on creating (additional) safer routes depending on traffic free options and other opportunities	Not Essential;	Not Essential;	Not Essential: However to become a full cycling hub, a bicycle hire outlet must be established

## 4.2.2 Cycling Hub Towns

Cycling Hubs Towns will be attractive destinations in their own right. They will be accessible by public transport and will have plentiful visitor accommodation. They will be welcoming to cyclists, with cycle-friendly roads, places to stay and businesses. Bike hire and repair services will be available, tours will be arranged, and maps and guides drawn up to encourage the public to explore the area by cycle. Local accommodation and catering facilities will ensure that visitors can cycle further afield and specific cycle routes will be developed to avoid any particularly busy or dangerous roads. A cycling hub will also, ideally,

have a community sector that is supportive of cycling. This could include sporting cycling organisations, cycling advocacy groups, or a proactive business community. This is hugely important in the development phases of the project so as to provide the local authority with strong support for the initiatives proposed. A cycling hub town may also be interested in wider issues such as concern for the environment and matters relating to sustainable transport and tourism.

Region	Gateways	Hubs Category One	Hubs Category Two
<b>East Coast &amp; Midlands</b>	Dublin Airport Dublin Port Dun Laoghaire Port	Dundalk Mullingar Glendalough/Laragh	Dublin Athlone
<b>South East</b>	Rosslare Waterford Regional Airport	Dungarvan Wexford	Kilkenny Enniscorthy New Ross Carrick-an- Súir Waterford
<b>Cork – Kerry</b>	Cork/Ringaskiddy Port Cork Airport Kerry Airport	Killarney Skibbereen Clonakilty Bantry Dingle	Cork
<b>Shannon</b>	Shannon Airport	Doolin	Ennis Tuamgraney / Scariff Kilrush Limerick
<b>West</b>	Galway Airport Ireland West Airport	Clifden Achill	Westport Galway
<b>North West</b>	Sligo Airport Donegal Airport Derry Airport	Ballyshannon Derry Sligo	Buncrana Sligo



Currently there are no towns within the study area that can be identified as satisfying all of the criteria for hub status. Therefore two categories of potential hub have been identified:

### Hub - Category One

The main work involved in realising these 'quick wins' will be the formal signing of the routes and, in some cases, the resurfacing of short sections of routes. Maps will need to be produced giving basic information on directions, route lengths, accommodation etc. Cycle hire will be in place. This work can begin immediately and be completed in a relatively short period (1-3 years).

### Hub - Category Two

More serious traffic engineering work will be required to enable these locations to be marketed as being truly cycling friendly. Such work would range from the creation of new greenways linking town centres to the nearest of the quietest minor roads, to carrying out work on junctions to facilitate cyclists' crossing of busier roads. For example Cork city currently has a first-class greenway running South Eastwards from the city but it does not link completely with the city centre, nor does it continue all of the way to Ringaskiddy Port. The Category Two hubs will also require the production of maps and other items as in Category One above.

#### 4.2.3 Cycle Routes – Loop Routes and Long-distance Routes

Each of the cycling hub towns will have a number of attractive and safe, sign-posted, routes emanating from the town. These routes, as identified in each of the Regional reports, will mainly be along minor roads and will be loop routes returning to the hub town. The routes will require signposting but may also require other traffic engineering works, for example on town roads, along(side) N- or R-roads or by the creation of traffic-free greenways.



New Signing in Northern Ireland

### Loop Routes

Loop routes will be those identified routes that can be completed over a half-day or full-day's cycling. They will run mainly along quieter minor roads and enable the cyclist to experience the best of the natural and built heritage. Some of the loops will be more suitable for families (i.e. will contain very lightly trafficked roads or traffic free sections), some more suitable for the casual cyclist, while some because of topography or traffic levels will be more to the liking of the fitter, more experienced cycling tourist. It is envisaged that levels of suitability of each of the identified routes will be detailed in any maps that are produced for the tourist. The loop routes will be particularly attractive for those participating in multi-activity holidays, an important growing market.

### Proposed sign layout for National Cycle Network



1. National route number
2. Local route number
3. Logos reflecting branding of route

### Long-Distance Routes

The development of long-distance routes is targeted towards the more serious cycling visitor who is comfortable cycling long-distances by bike and sharing the roads with mixed traffic, which may sometimes include coaches or heavy goods vehicles on sections of R (or N-) road. The vast majority of the long-distance routes will be along quieter minor roads away from the noisier more heavily trafficked routes.

The visitor may be attracted to cycling all or sections of a Malin Head to Mizen Head route along the West coast. This could become a marketable concept similar the Lands End to John O'Groats challenge in the UK. A more manageable but very marketable long-distance concept route would be a Belfast-Dublin route which would take in the proposed traffic-free sections to the North East of Dundalk and to the North of Dublin at the Broadmeadow Estuary finishing up on the spectacular S2S route.







An existing long-distance route which is proposed to be upgraded to improve safety and attractiveness is the Táin Trail Cycling Route. This route could be cycled in full or in sections and would include traffic-free sections around Dundalk and, potentially, alongside the canals in the future.

#### 4.2.4 Types of Roads

##### Local Minor (Third Class) Roads

Much of the proposed Irish Cycle Network route will utilise the network of country lanes and roads throughout the country. These roads have been chosen where traffic levels are light and lanes have a line of green grass up the centre rather than white paint! There however is a need for signs. Firstly we need to direct cyclists to their destination and also we need to alert cars to the fact they should expect cyclists. The latter signage is only on the busier roads. In choosing the minor roads, we have selected those which form a reasonably direct line between towns and also roads that are scenic. The average cost per km is €3,000.

##### Regional (R) Roads

The cycle friendliness of Regional or R-roads varies enormously. Some have relatively low traffic volumes, low proportions of HGV's or tour coaches, and vehicular speeds are low. Others attract far greater volumes of general traffic at higher speeds and are not particularly comfortable to cycle along. Most of the Regional roads do not have hard shoulders. If R-roads are to form part of a National Cycling Network, then (during delivery phase of the project) it should be investigated whether speed limits can be reduced along certain sections. It should also be investigated whether speeding enforcement can be better enforced.

## National (N) Roads

National or N-roads are not, generally, recommended as forming part of a National Cycling Network. As with the R-roads, traffic levels are higher with many carrying significant volumes of Heavy Goods Vehicles (HGV's) and tour coaches. They also have a default speed limit of 100kph. Some National roads do, however, have hard shoulders which can act as a wide dedicated space for cyclists. In these cases, it is recommended that special signage should be erected (in addition to cycle directional signage) to warn drivers of the presence of cyclists. A more involved intervention is to provide a 2.5m+ off-road cycle track as per 4.2.5 below.



## Traffic-Free Routes and Greenways

There is a strong need to create some world-class traffic-free routes to cater particularly for those touring cyclists leaving the cities to discover the countryside. Currently, they are required to use busy R and N-roads for, perhaps 5-10km, where vehicular speeds are high and conditions for cycling are very poor. Recommendations are made for the creation, on half a dozen or so routes, of high quality traffic free sections to enable cyclists of all abilities to leave built-up areas and by-pass busy dangerous roads.

Cyclists, particularly less experienced and young cyclists, like to be away from traffic whenever possible as this enables them to enjoy the sounds and sights of the countryside without the noise and other distraction of cycling in traffic. Greenways are always shared with pedestrians and sometimes with horses. Disused railway lines are plentiful in Ireland and these can provide excellent greenways. Also riverside paths and canal towpaths can provide excellent recreational facility. Strategic greenways will become tourist attractions in their own rights, as is the case throughout Europe. Indeed in the urban areas with appropriate design

### City / Town Cycle Provision

these can also be used for utility journeys. Potential greenways in Ireland include Galway City to Newport to Achill, Dungarvan to Waterford and Cork to Ringaskiddy. The average cost per km is estimated to be €150,000.

If developed in full the proposed S2S promenade alongside Dublin Bay would doubtless prove to be one of the finest greenways in Europe.

#### 4.2.5 Examples of Interventions Required on the Cycle Network

Examples of the types of physical intervention anticipated for the development of the network are provided below.

Where the cycle network passes through a major town and traffic levels and /or speeds are high, the ideal or preferred choice is to reduce traffic volumes (especially heavy goods vehicles) in the town centre, to slow down traffic (e.g. with traffic calming measures / introducing 30kph speed limits), and in some cases to reconfigure wide complex junctions with multi-lane approaches together with cyclist-unfriendly multi-lane one-way street systems. This is, of course, a more strategic and expensive intervention in the traffic management system of any town but may be the only way to improve conditions in the urban environment. A topical relevant example is the opening of the Dublin Port Tunnel which should improve safety on the city streets as many of the larger heavy goods vehicles (5 axles or more) are removed from the central zone from 7am to 7pm.



Where such serious interventions are not possible, it is desirable to improve provision for cyclists by re-prioritising carriageway space in favour of the cyclist, for example by creating very wide (ideally 4.5m) shared bus / cycle-lanes or wide (ideally 2.0m) cycle-lanes. In other cases a wide segregated facility may be more appropriate – either at carriageway level with a segregating kerb, at pavement level or as a “raised adjacent” facility (at a level between that of the main carriageway and that of the footpath). The detail of what type of facility is most appropriate for a given urban context is a subject in itself (and an evolving one) and beyond the scope of this study. However, it should be noted that if a dedicated cycle facility is to be provided along a link, it is imperative that special attention is given to the design of the junctions – the locations where the majority of conflicts and crashes occur.

Given the above discussion, it can be very difficult to estimate the average cost per km of providing cycle-friendly routes in urban areas since it is dependent on the nature of civil works required (especially at junctions and especially if new signals are proposed or where it is necessary to move existing services). A figure of €150,000 / km is suggested as working estimate for the provision of urban segregated cycle-facilities.

#### Provision along / alongside R and N roads

Generally due to high traffic levels and high speeds we wish to avoid cycling on N or R-roads. On unavoidable sections, it may be desirable to provide wide, well-surfaced, hard shoulders – these can provide a safe, wide, corridor for cyclists out of the path of faster moving vehicles. However, noise levels and the nearby presence of heavy goods vehicles can be such that the route will not feel safe and peaceful.





In some cases, it may be desirable to construct a well-designed length of cycle track alongside the R or N roads. These tracks should be separated from traffic by a 1.0m grass strip margin. The surface of the cycle track should be smooth, machine-laid bitmac and have flush dropped kerbs at the beginning and end of the track. There are many very poor examples of short lengths of cycle track in Ireland at present that are impracticable to use by cyclists. Lessons must be learnt from the provision of these poorer facilities so that a new generation of cycle facilities provide a dramatically improved environment for the cyclist. The average cost per km is estimated at €90,000.

### 4.3 Mountain Biking

A study of the potential of Mountain-biking (MTB) was not part of the remit of this study but it is understood that funding has been sought for the provision of MTB facilities in three separate Coillte sites: (i) Ballyhoura Mountain Bike Trail Network (near Kilfinnane, Co. Limerick), (ii) Ballinastoe Mountain Bike Area (near Roundwood, Co. Wicklow), and (iii) Killary Cycle Centre, near Killary, Co. Wicklow. The Ballyhoura site is at an advanced state of development and it is understood that Mountain Bike Centre will be designed by the world's leading trail designer Dafydd Davis who has designed some of the most exciting and challenging trails known to mountain bikers across the globe. The development will see construction of over 25 kms of purpose built singletrack biking trails on land across east Limerick and north Cork within Coillte Forestry. Further information on this plan be gleaned from <http://www.ballyhouracountry.com/>

### 4.3 Signage

This strategy recommends the creation of a dedicated signage system for cyclists based on the model developed for Euro-Vélo, the European-wide cycling network. It will be consistent with the signage used throughout Britain and also with the National Cycle Network in Northern Ireland. Therefore, the continuity of the “Euro-Velo” established system across the border counties will facilitate in the creation of a seamless experience for the cycling tourist. Recommendations are also made for the signing of a much longer cycle network to cater for the more experienced cycling tourist. Ownership of signage should normally rest with the Local Authority who then should allocate a resource to maintain the signage in the case of vandalism or theft.

### 4.4 Integration of Cycling and Public Transport

Compared with our Continental competitors, cycling is very poorly integrated with public transport. There are few, if any, well sign-posted, safe, cycling routes to airports, ports and even some of the main train stations. Few such public transport interchanges have safe, conveniently-located, attractive, sheltered cycle parking facilities as is the norm in many European countries. The carriage of bikes on trains is becoming increasingly difficult – the opposite of the trend that is required for Ireland to become a truly cycling friendly culture and destination.



#### 4.4.1 Airports

All airports should be cycle-friendly environment. They are the arrival points for the majority of visitors to Ireland, and so the visiting cyclist will form his or her first impressions from their first few hours here. It is very important that those first few hours are a pleasant experience. This means, most crucially, that there are safe, attractive and well sign-posted routes for cyclists leading to and from the airport from the nearest city or town.

There should be a well-located, well-designed cycle park at every airport. A dedicated area should be set aside at each airport to enable cyclists to dismantle / re-assemble their bikes. This could include a public bike pump, as is provided at public bike parking stands in many German and Danish cities.

Bicycle boxes should be available for those cyclists travelling without them, as are provided at Schiphol airport in the Netherlands. (See bottom right page 30). The tourism information points in the airports should have literature / maps for cyclists indicating the safest and most attractive routes leading from the airport. They should also have information on cycling friendly accommodation.

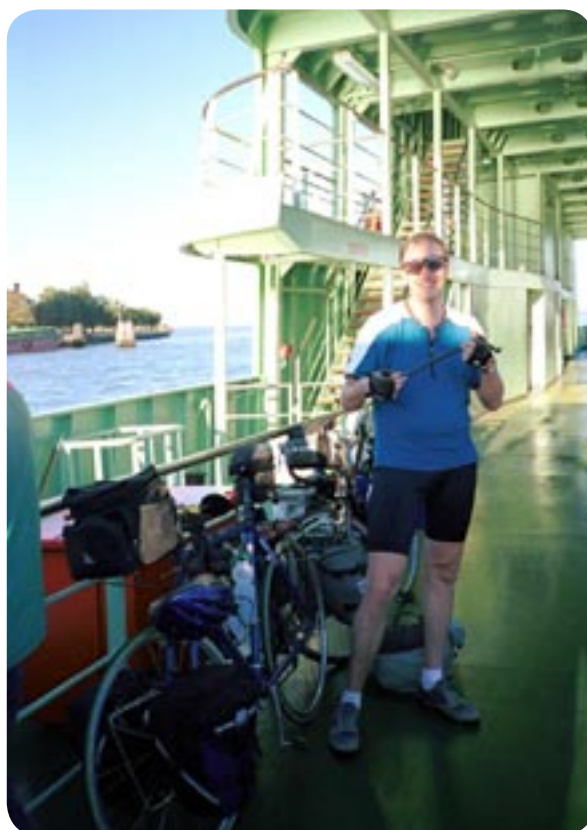
It was beyond the scope of this phase of the study to meet with the key figures in Aer Rianta, the airline companies making greatest use of the airports and the local councils, but it is strongly recommended that this takes place in the next phase of the study.



#### 4.4.2 Ports and Ferries

Safe, attractive, well-sign posted cycling routes should be available from all ports to the centre of adjacent cities / towns.

Carriage of bikes is permitted at a cost of €8.00 per single trip for Stena Line and Irish Ferries. The carriage of bikes was free-of-charge up until recently. It is recommended that in the next phase of the project, contact is developed with cycling advocacy organisations in the UK who have worked on the issue of making ferries more bicycle friendly



#### 4.4.3 Rail

For many users, the ability to transport cycles on trains is a crucial link in the chain of planning and participating in a cycling holiday. Cyclists arriving by ferry may not have access to a car and using trains can deliver them directly into rural Ireland.

Irish Rail's existing policy on the carriage of bike by rail is inadequate. While it is currently possible to carry bikes in the "Guard's Van" of most Intercity services, it is not possible to carry bikes on those routes in which sub-urban rail style (Arrow) services are used. This currently includes the Wexford and Sligo lines, together with services into Cork from Mallow, into Ennis from Limerick and all of the sub-urban services into Dublin (including DART (even at off-peak)).



It is understood<sup>1</sup> that the new intercity trains, being delivered in 2007 and 2008, will have dedicated space for only one bicycle on the three-carriage units or two bicycles on the six-carriage units. This provision will present a very serious problem for cycling tourists wishing to bring bicycles out of Dublin into rural Ireland. Groups of more than two (or more than one in the case of three-carriage sets) will be unable to travel together with their bicycles. The impact of this restriction is compounded by the lack of cycle hire options outside of Dublin which obliges cycling visitors



to hire bikes in Dublin and transport them by public transport to rural areas. In summary, the current plans will present a serious obstacle to the development of cycle tourism in rural areas.

It is strongly recommended that Irish Rail investigates fully the feasibility of modifying (or requesting their supplier to modify) carriages in such a way as to accommodate bicycles for intercity (and other) services. This could, perhaps, mean fitting “flip-up seats” as are provided on services in Northern Ireland. The bicycles are lined up neatly in the dedicated area and strapped in with a seat-belt. See figure below / above. Such modifications can also improve flexibility and benefit customers with baby buggies or those with disabilities.



There should also be a reservation system to facilitate groups who want peace of mind when planning their cycling trip and wish to be able to take their bikes on the train.

A large, conveniently-located, sheltered, attractive cycle park must be provided at every rail station in Ireland. Opportunities for this provision should be especially during the redevelopment of Galway rail / bus station, Connolly station and the newly proposed Spencer Dock station.

During the implementation phase of the overall project, it is also crucial to work with the local authorities so that priority is given to providing safe, attractive, well sign-posted routes to / from each of the stations.



1 From a meeting on Thursday 22nd March 2007 between representatives of the project team (Damien Ó Tuama and Rick Cook), the client (represented by Paddy O'Mahony) and Irish Rail (represented by Michael Power, Joe Beardmore and Myles McHugh)





#### 4.4.4 Bus

All Bus Éireann services will carry bicycles, provided there is room on board. The decision is at the discretion of the driver. This arrangement, while better than nothing, is far from ideal. When planning a holiday, accommodation (for example) may need to be pre-booked, so users may have a tightly defined itinerary. Turning up at a bus and only then finding out if there is room on the coach for your bike is a less than ideal system. A booking system should be available. Furthermore, anecdotal evidence would suggest that some users find the cost of the carriage of bikes on Bus Éireann quite expensive, especially for shorter trips.

All Bus Éireann stations should have well located, secure, sheltered cycle parking facilities. This is especially true for the main Store Street station in Dublin in which many commuters would cycle to the station and take the bus to the country or another city.

It was beyond the scope of this study to investigate the policies of the private bus companies in regard to bicycle carriage but it is recommended that this is carried out in the next phase of work.



## 4.5 Cycle Hire

### 4.5.1 Existing Situation

The availability of good quality bicycles and accessories for hire throughout the country is an essential element for the creation of a top quality cycling tourism product. Currently the bicycle hire business is not as professional as competitor destinations.

Many towns have no bicycle shops at all or else no bicycle shops offering bicycle hire. Some are hardware shops that sell a few bikes but concentrate on other goods. Some that do offer bicycle hire have a limited number of bicycles for hire and these bicycles are sometimes of poor quality. Furthermore, the range of accessories that one would normally expect for the cycling visitor is often not available. Such items should include:

- Pannier Bags
- Bicycle Lights
- Basic tools
- Raingear
- Maps of recommended routes

Some bike shops that do offer bicycle hire do not have the facility for the tourist to drop the bicycle off at locations other than where it was hired.



Raleigh Ireland's website does list the Raleigh dealers covering rent-a-bike - [http://www.raleigh.ie/\\_rentABike/rentABike.asp](http://www.raleigh.ie/_rentABike/rentABike.asp)

Raleigh Ireland used to organise the insurance (personal accident, third party, employer liability, theft) for all of the Raleigh Dealers with the costs absorbed by the bike shops as a function of the numbers of bikes being hired. When Eurotrek took over Raleigh Ireland (in around 2000), the insurance was organised through Irish Cycle Hire. However, in 2005, it is understood that the insurance brokers decided to withdraw the insurance. While some of the bigger Raleigh Rent-a-Bike dealers were able to organise their own insurance, many of the smaller dealers were not able to do so and have withdrawn from the Raleigh Rent-a-Bike scheme. The approach of some dealers is to sell the bike to the customer and buy the bike back on their return - thereby absolving them from any insurance responsibility.

While Raleigh Ireland used to organise the transfer of bikes from one location to the next, this facility is no longer available. The onus is on individual dealers to organise this. Few do.





#### 4.5.2 Proposals

Members of the bicycle industry are as keen as anyone else to resolve the difficulties associated with insurance for bicycle hire. The bulk sales of bikes in March / April / May provided the industry with a boost early in the season between the bulge in sales at Christmas and the sunnier summer period.

It is recommended that Fáilte Ireland enter into negotiations with some of the major insurance companies in order to broker a deal that would enable the bike hire dealers to access insurance cover. It may be the case that some sort of support or assistance will need to be provided to the cycle hire operators in order to make the business viable – at least until a more permanent solution can be found.

The idea has also been raised that bicycle-hire services could become available at Dublin Airport since so many visitors are entering the country at this point. It could be linked with the provision of car hire. Such an idea should be developed at the next phase of the project.



#### 4.6 Cycling-Friendly Accommodation

For accommodation to be cycle-friendly, it should fulfill several requirements. These would include:

- a secure and sheltered spot for the bicycle;
- basic tools available for the cyclist;
- good washing and drying facilities for any clothes and wet-gear belonging to the cyclist;
- good information on cycling routes in the area.

It is recommended that the sphere of cycling-friendly accommodation should be investigated in the next phase of the project – drawing on the successful examples from abroad.

05



## 05 Marketing the Product

### 5.1 The Range of Marketing Interventions

In terms of the marketing aspects of this strategy it is useful to think in terms of the range of interventions that will be required if a truly integrated and seamless message is to be conveyed to existing and potential visitors. Such interventions must not only be informed by but importantly, must inform and refresh current messages employed by Tourism Ireland in its endeavour to market the destination internationally. Interventions will include;

- Alignment with destination branding
- Alignment with product sub branding ... the key messages that will be employed to profile activity tourism
- Awareness raising prior to making the decision to visit - on line and off line fulfilment pieces
- Information on arrival ... what all should be available by way of branded literature at points of entry, at the hubs, at Tourist Information Centres
- Information along the routes themselves... appropriate branding of advance directional signing
- Directional signing to the various attributes, assets and attractions off the route

### 5.2 Branding

A key challenge when considering branding relates to the need to construct a consistent and visually coherent architecture for the way in which consumer facing product brands will be developed. From the point of view of the consumer we need to know what needs to be consistent and how such consistency is ensured.

Notwithstanding the challenge that this presents, a consistent brand should be used relative to all marketing communications associated with the cycling product. This brand must be used for marketing to the overseas as well as to domestic markets. It will help to register Ireland as a cycling destination in people's minds prior to making a decision to visit. It will also induce a seamless 'journey' by promoting identification with the brand from the earliest opportunity all the way through to making a decision to visit, to arrival and participation in the activity.

While the overarching or mother brand will remain the same, sub brands for regional purposes may be used to ensure that the characteristics and flavour, as well as the name of the region and its local distinctiveness shine through. This should not be a big step away from the overarching brand; rather it should complementary to it.



### 5.3 Marketing Communications

The marketing communications avenues recommended are based around the marketing model of AIDA (Attention, Interest, Desire and Action). This model looks at selling a product by taking the consumer through a series of steps. While some communications fulfil the AIDA process on their own it is advisable to ensure that the entire communication process adheres to the AIDA principles. In specific terms the communications strategy will focus on the following;

#### Target market

- People with some kind of interest in cycling or being active.

#### Target sub markets

- People looking for dedicated cycling breaks and holidays
- People and family groups looking to cycle for a day, or half-day, when holidaying in Ireland.
- Residents of Ireland looking to cycle for a day, or half-day with their home as a base.
- People and family groups looking to cycle for a day or half-day, as part of a multi-activity holiday.

**Dedicated cycling breaks and holidays**

<b>Decision stage:</b>	<b>Attention</b>	<b>Interest</b>	<b>Desire</b>	<b>Action</b>
Website	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Events	<input type="checkbox"/>			
Leaflets				
Brochure	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Advertising/Direct Mail	<input type="checkbox"/>	<input type="checkbox"/>		
Information line		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Maps & Guides			<input type="checkbox"/>	<input type="checkbox"/>

**Cycling day rides – visitors and holidaymakers**

<b>Decision stage:</b>	<b>Attention</b>	<b>Interest</b>	<b>Desire</b>	<b>Action</b>
Website	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Events	<input type="checkbox"/>			
Leaflets	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Brochure				
Advertising/Direct Mail				
Information line		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Maps & Guides			<input type="checkbox"/>	<input type="checkbox"/>

**Cycling day rides – residents**

<b>Decision stage:</b>	<b>Attention</b>	<b>Interest</b>	<b>Desire</b>	<b>Action</b>
Website	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Events	<input type="checkbox"/>			
Leaflets	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Brochure				
Advertising/Direct Mail		<input type="checkbox"/>	<input type="checkbox"/>	
Information line			<input type="checkbox"/>	<input type="checkbox"/>
Maps & Guides				<input type="checkbox"/>

**Attention** gets a person's attention

**Interest** provides additional useful information (and a call to action for more information in order to create desire)

**Desire** offers something that they are looking for

**Action** gives them an immediate call to action – to book, cycle (not get more information)

#### 5.4 Website

The cycling tourism website can bring together an area, be it a region or country, to inform people about the types of cycling available. It is 'a global shop window' and can be the first and main and only point of reference and contact for someone wanting to embark on a cycling holiday or visit Ireland and cycle whilst there. It should be a place where people can find out about the whole experience, not just about the routes. For instance the following are items to be incorporated:

- Bike hire locations and details of services and equipment available;
- Accommodation - cycle friendly accommodation;
- Routes, and grading of routes;
- Transport, to and around destination, including luggage transfer - including environmental section - choosing bus/train/ ferry over planes and cars where possible;
- Other activities available, eg sailing, walking - link to information;

- Booking mechanism whether via email or relevant phone numbers given;
- Search facility for route type, distance, level of cycling, number of days etc.

It will also give details of the other marketing material available such as leaflets, brochures, information lines and maps / guides.

#### 5.5 Leaflets

The most basic level of the hierarchy is the local leaflet, which provides information on shorter day rides, with simplified map. This should provide inspirational pictures on the cover, branded routes and include details of local facilities such as bike hire and pubs. This may be the only medium that this market will need to encourage them to cycle. It could be a chance sighting of the leaflet that has intrigued them or they would have asked for activity leaflets from local Tourist Information Centres. They should also be available on the website.

**It is recommended that a series of leaflets be developed to:**

- Market the products on offer to attract local audiences
- Promote the local destination and attractions to persuade people to use the leaflet and local facilities

#### 5.5 Brochure

It is recommended that a brochure be developed to;

- Market the product on offer to attract the relevant audience(s) for the product(s)



- Promote the destination as much as the cycling. There are many other destinations that a person can cycle so the way the destination is sold could be the deciding factor.
- Use inspiring, motivational pictures – and not just routes and people, but destination focused
- Be the main hard (not electronic) communications for enquiries to the information line (postal and telephone) and website (emails)
- Be the main communications for direct mail/advertising (or in response to Direct Mail/Advertising)

## 5.6 Information Line

The recommendation is for an information line, either part of an existing call centre with dedicated staff trained to this product, or a separate information line(s). The information assistants should reflect the brand by the way that they know/sell the product and could be the first experience of an Irish welcome for prospective visitors.

It is thought that the information line will be a first port of call for many people who have either seen the direct mail/advertising or the website. It offers a human aspect to the selling of the cycling product.



**There are four main objectives for the information line:**

- To provide free information to help people make a choice
- To close sales with people who have had enough information to enable them to make the choice
- To sell products such as maps and guides
- To provide a taster of the Irish Welcome
- The map
- A profile of the route
- Useful information such as tourist information, cycling in other areas, where to get more information,
- Signage – what to look for
- Front cover picture to reflect the route – for hubs a destination type picture as opposed to a cyclist and route.

### 5.7 Maps and Guides

Depending upon the size of the cycle areas, the maps should be regional format with north always pointing to the top of the paper, as opposed to strip maps. At approximately 1:100,000 scale it should contain:

Guides should reflect the area and have some parts of route maps, perhaps though town centres. The size of the guide should be quite small, pocket sized or small enough to be put in a bag. Spiral bound is a good option.



### There are two options for a guide:

- 01 To produce a route companion, and provide information that will help them on a daily basis. The main market would be those cycling the route.
- 02 To produce a 'coffee table' gift or souvenir that details the culture and sells the destination rather than provides useful information. The main market would be a general audience buying for themselves as they have or are visiting the area or for a gift.

### 5.8 Hub Map Guide

#### The development of Hub Map Guides will;

- Be the detailed communications vehicle for each hub
- Give details of the product on offer to help get the best experience from a break/holiday
- Promote the destination facilities as much as the cycling.
- Be the main hard (not electronic) communications for selling (bolt-on) once a person has booked a holiday
- A feel for the brand and promise – what can be expected

### It should contain:

- Description of the destination
- Bike Hire and facilities
- Simple cycle maps
- Local cafés, pubs, restaurants and shops
- Local transport
- Tourist information offices
- Local attractions
- Discount voucher(s)
- Details of signage – what to look out for

### 5.9 Business Support

While not strictly speaking part of the communications mix, business support is nevertheless an important consideration.

#### Recommendations include;

- Holding business seminars to tell SMEs what the regional plans are and how they can support the plans whilst benefiting their businesses.
- Repeating this at set intervals and monitoring.
- Holding business seminars for local authorities and transport operators so that they are on board at the start of any plans.

06



# 06 Delivery and Next Steps

## 6.1 A Multi-Departmental / Multi-Agency Approach

The purpose of the Cycle Network is to link regions and places of interest so as to provide opportunities for visitors to cycle, ways to strengthen the local visitor economy and the means to promote regional development. While firmly couched within the agenda for the development of tourism it is important to recognise the extent to which this initiative also addresses a range of other government priorities.

It will be important that every opportunity to collaborate on the delivery of this ambitious programme is explored and pursued. Given the scope of the intended interventions and the anticipated impact on a wide range of government priorities, there will be scope to lever assistance from a variety of sources over and above what is available for tourism. Interested parties must work together to develop creative and innovative funding solutions.

European funding may only be an option in certain areas - for example Interreg funding through linking South coast to France or the East coast to Wales and the North West to Northern Ireland and Scotland. There will however be a need for more domestic funding.

It is important to emphasize the flexibility approach to funding to take advantage of the opportunities available for each route which will be different. In addition to the above, private developers have also contributed in the past where they produce sections of route as part of planning gain.

### North West Trail Case Study FUNDING

*The project secured 75% EU Interreg IIIA funding through the Department of Agriculture and Rural Development in Northern Ireland (DARD) and Border Action. The Donegal, Leitrim and Sligo county councils and Strabane, Omagh and Fermanagh district councils are providing the match funding.*

### Innis Eoghain Case Study FUNDING

The Innis Eoghain project was funded by a cocktail of funding sources:

<b>European Sources</b>	<b>50%</b>
<b>Central Government:</b>	
Environment and Heritage Service	
Access to the Country Side	<b>5%</b>
<b>Local Authority Transport:</b>	
Resurfacing roads and new build	<b>30%</b>
<b>Local Authority Parkland</b>	<b>5%</b>
<b>Local Authority:</b>	
Urban regeneration	<b>5%</b>
<b>International Fund for Ireland</b>	<b>5%</b>

# Table 1: Route Distances & Costs

## Route Distances and Estimated Costs for the Irish National Cycle Network

Regional Summary					National Summary					
Location	Route Status	Type of Route	Length /km	Cost /€	Category of Route	Name	Route Status	Length /km	Cost /€	
North West	Open	On Road	171	€0	Hub Routes	Sligo	Open	1	€0	
	Open	Traffic Free	2	€0			Proposed	92	€469,069	
	Open	Greenway	0	€0			Ballyshannon	Open	40	€0
	Proposed	On Road	712	€953,414		Proposed		9	€7,737	
	Proposed	Traffic Free	15	€1,234,126		Long distance (Remaining)		Greencastle - Ballina	Open	132
	Proposed	Greenway	3	€263,619			Proposed	630	€1,974,353	
<b>Total</b>			<b>904</b>	<b>€2,451,159</b>	<b>Total</b>			<b>904</b>	<b>€2,451,159</b>	
West	Open	On Road	1	€0	Hub Routes	Achill	Open	0	€0	
	Open	Traffic Free	2	€0			Proposed	65	€32,783	
	Open	Greenway	0	€0			Clifden	Open	0	€0
	Proposed	On Road	587	€1,598,203		Proposed		112	€172,949	
	Proposed	Traffic Free	6	€585,723		Westport		Open	3	€0
	Proposed	Greenway	48	€5,539,011			Proposed	33	€567,799	
<b>Total</b>			<b>644</b>	<b>€7,722,936</b>	Long distance (Remaining)	Ballina - Kinvarra	Open	0	€0	
						Proposed	431	€6,949,405		
<b>Total</b>			<b>644</b>	<b>€7,722,936</b>	<b>Total</b>			<b>644</b>	<b>€7,722,936</b>	
Shannon	Open	On Road	0	€0	Hub Routes	Ennis	Open	0	€0	
	Open	Traffic Free	0	€0			Proposed	48	€115,487	
	Open	Greenway	0	€0			Lisdoonvarna	Open	0	€0
	Proposed	On Road	490	€2,429,651		Proposed		19	€18,283	
	Proposed	Traffic Free	3	€120,795		Long distance (Remaining)		Kinvarra - Limerick	Open	0
	Proposed	Greenway	0	€0			Proposed	426	€2,416,675	
<b>Total</b>			<b>493</b>	<b>€2,550,446</b>	<b>Total</b>			<b>493</b>	<b>€2,550,446</b>	
Cork & Kerry	Open	On Road	0	€0	Hub Routes	Bantry	Open	0	€0	
	Open	Traffic Free	0	€0			Proposed	105	€86,983	
	Open	Greenway	3	€0			Clonakilty	Open	0	€0
	Proposed	On Road	1,038	€5,805,615		Proposed		73	€54,941	
	Proposed	Traffic Free	14	€1,247,292		Cork		Open	3	€0
	Proposed	Greenway	5	€733,569			Proposed	117	€1,845,615	
				Dingle	Open		0	€0		
<b>Total</b>			<b>1,060</b>	<b>€7,786,476</b>	Long distance (Remaining)	Killarney	Open	0	€0	
						Proposed	68	€543,931		
					Skibbereen	Open	0	€0		
						Proposed	69	€775,004		
					Long distance (Remaining)	Limerick - Youghal	Open	0	€0	
						Proposed	540	€4,367,454		
<b>Total</b>			<b>1,060</b>	<b>€7,786,476</b>	<b>Total</b>			<b>1,060</b>	<b>€7,786,476</b>	
South East	Open	On Road	0	€0	Hub Routes	Dungarven	Open	4	€0	
	Open	Traffic Free	0	€0			Proposed	310	€3,172,864	
	Open	Greenway	4	€0			Killkenny	Open	0	€0
	Proposed	On Road	617	€2,405,993		Proposed		112	€1,104,007	
	Proposed	Traffic Free	13	€1,257,287		Wexford		Open	0	€0
	Proposed	Greenway	11	€1,586,878			Proposed	147	€705,625	
<b>Total</b>			<b>644</b>	<b>€5,250,158</b>	Long distance (Remaining)	Youghal - Wexford	Open	0	€0	
						Proposed	72	€267,662		
<b>Total</b>			<b>644</b>	<b>€5,250,158</b>	<b>Total</b>			<b>644</b>	<b>€5,250,158</b>	
East Coast & Midlands *	Open	On Road	291	€0	Hub Routes	Athlone	Open	2	€0	
	Open	Traffic Free	0	€0			Proposed	47	€178,445	
	Open	Greenway	0	€0			Mullinger	Open	0	€0
	Proposed	On Road	797	€6,217,054		Proposed		79	€2,287,257	
	Proposed	Traffic Free	7	€18,678		Dundalk		Open	49	€0
	Proposed	Greenway	30	€2,227,997			Proposed	69	€1,627,586	
<b>Total</b>			<b>1,125</b>	<b>€8,463,730</b>	Long distance (Remaining)	Dublin *	Open	0	€0	
						Proposed	48	€414,924		
					Glendalough	Open	0	€0		
						Proposed	158	€953,100		
					Long distance (Remaining)	The Tain Trail	Open	240	€0	
						Proposed	228	€1,006,107		
					East Coast Route	Open	0	€0		
						Proposed	205	€1,996,310		
<b>Total</b>			<b>1,125</b>	<b>€8,463,730</b>	<b>Total</b>			<b>1,125</b>	<b>€8,463,730</b>	
<b>Total of Hubs</b>								<b>1,515</b>	<b>€15,246,939</b>	
<b>Total of Long Distance</b>								<b>2,905</b>	<b>€18,977,968</b>	
<b>Overall Total</b>								<b>4,871</b>	<b>€34,224,906</b>	

\* excludes costings for Dublin Hub routes B, C & D

Greenways				
Type of Route	Name	Route Status	length /km	Cost /€
Greenways	Sligo - riverside path	Proposed	3	€263,619
Greenways	Newport to Achill - Co Mayo	Proposed	27	€3,459,416
	Galway Greenway	Proposed	9	€1,300,219
	Glann Forest (near Maam's Cross)	Proposed	12	€779,377
Greenways	Cork to Passage West	Open	3	€0
	Cork to Passage West	Proposed	5	€733,569
Greenways	Dungarvan to Waterford	Open	4	€0
	Dungarvan to Waterford	Proposed	11	€1,586,878
Greenways	Mullingar Royal Canal	Open	0	€0
	Mullingar Royal Canal	Proposed	19	€1,404,715
	Dundalk flood Ramparts	Open	0	€0
	Dundalk flood Ramparts	Proposed	11	€823,282
<b>Total</b>				<b>€10,351,075</b>

It should be noted that the costings for Dundalk do not include the cost of providing a new pedestrian / cyclist bridge over the Ballymascanlan Estuary alongside Dundalk Harbour.

As per the discussion in section 6.3 of Chapter 6 of this Executive Summary, it is very difficult to provide estimates of costs for the construction of urban cycle schemes, particularly those that involve significant civil engineering input - in, for example, the provision of facilities alongside the coast, or where major changes to junctions are proposed. Therefore it was considered prudent to provide estimates only for routes A, E and F in Dublin.

It was beyond the scope of this study to provide estimates for the other loop routes identified here:

- Route B** (S2S with Extensions to Howth and Shangannagh),
- Route C** (Dodder Route),
- Route D** ("C50" - Canal Route).



## 6.2 Structure for Delivery

### 6.2.1 Steering Committee (with updated Flow Diagram showing delivery structure)

We recommend that a Steering Group, as illustrated below, be established to coordinate the development of cycling routes across the country. This National Cycle Network Steering Committee would comprise:

- a lead organisation to coordinate the project
- the Government Departments and agencies who can advise and assist
- representatives from local areas to report progress and problems on local routes

### Proposed National Cycle Network Steering Committee

- Department of Transport
- Department of Arts, Sport and Tourism
- Department of Community, Rural and Gaeltacht Affairs
- Department of the Environment and Local Government
- Irish Rail
- Fáilte Ireland
- Irish Sports Council
- Walking Cycling Ireland
- Cyclists' Representative Organisation
- Coordinating organisation

### Structure for Delivery of the Irish National Cycle Network

#### NATIONAL

National Co-ordination  
 Planning  
 Funding  
 Marketing  
 Monitoring

National Cycle Network Steering Committee

#### LOCAL/REGIONAL AUTHORITY CYCLE WORKING GROUPS

Funding  
 Route Development  
 Community Liason  
 Signage  
 Local Marketing to include Maps & Promotional Activities

Local/Regional Cycle Network WORKING GROUPS



Formal Links



It will also be important to establish appropriate partnerships at local level. This is not about creating new bodies but rather working with and through existing groups and individuals to harness, re-focus and refresh their efforts towards the delivery of the strategy within their particular locality. We recognise the key role of the local authorities in this regard, in particular the county engineer in whom the specialist and local knowledge is vested and on whom the successful implementation of key infrastructure components of the strategy will depend. We also recognise the need for co-ordination between adjoining local authorities and the importance of providing a seamless experience for visitors taking advantage of longer distance routes.

### 6.2.2 Co-ordination

The delivery of current cycle networks in Ireland and elsewhere shows the need for lead organisations, both at national and local level. These co-ordinators are needed to pull together the partners and to drive the project forward with technical ability and determination. In the UK Sustrans fulfils this role. In Ireland, at local level, a variety of organisations such as community based groups, regional tourism development groups, through to individual consultants, provide this role. There is no national coordinating organisation for route development. We suggest that this issue be addressed.

The important thing is that a well-facilitated group is established hence the suggestion of a lead organisation to co-ordinate progress. This group will play a key role in ensuring that a consistent approach is adopted, a National Standard is adhered to and a partnership approach to all aspects of delivery is promoted.



## North West Trail Case Study

### CO-ORDINATION

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The North West Trail is a signed circular cycle route presently under development and due to open in summer 2007. The route passes through Counties Donegal, Tyrone (Strabane & Omagh), Fermanagh, Leitrim, and Sligo in the North West of Ireland. It will be some 326 kilometres long and pass through the main towns of Lifford, Strabane, Omagh, Enniskillen, Sligo and Donegal.

The project is being implemented by Sustrans working with a Steering Committee

made up of council officers, councillors and representatives from Fáilte Ireland, NITB, Garda and PSNI (Road Safety), IFI and DARD. The council officers are from a variety of different departments including, tourism, access, community service, road engineering and economic development.

The steering group meets every month with meetings chaired by a councillor, elected by the group annually. Sustrans services the committee providing minutes, agenda and meeting notices.



### 6.3 Costs of Implementation

The table below provides an overview of the estimated costs of implementing the proposed National Cycle Network as presented in this report. It will be seen that the total estimated cost of implementing the route recommendations over the six regions covered in this study - to include long distance routes and loop routes, and encompassing both traffic-free routes and on-road routes - is €34.8M. Of this figure, approximately €8.9M is the estimated cost of providing the all-important greenways leading cyclists from the built up areas into the calmer minor roads of the countryside. As noted alongside the costings table on page 46, the costings for the greenways/traffic-free routes for Dublin are not included in this figure.

Quality of the product is the key issue. We know that satisfaction ratings from current users are disappointing and continue to decline. Our competitors offer high quality, continuous networks. Therefore it is critical that the development of the Irish cycling product concentrates on high quality scenic routes,

removing the cyclist from the dangers of traffic. These well signed networks of cycle routes must be conveniently linked to the gateways and hubs, making it easy for visitors to explore the destination at their own pace, safe in the knowledge that the associated signing, maps and information will enable them to make the most of their stay. As has been the experience of other destinations, the development of some flagship Greenways will prove to be attractions in themselves.

In recognition of the scale of what needs to be done we recommend a phased delivery of the network, concentrating initially on those aspects – the category one hubs - that can be delivered reasonably quickly and within a realistic budget. This immediate intervention should be planned and delivered in a way that recognises the importance of maintaining the integrity and coherence of the overall network and, importantly, the quality of the product. An indication of these immediate priorities is detailed on below.

#### Costs for Delivery of Hub Towns Category 1

	Signage of routes	Leaflets	Interpretation Panel	Bike Stands	Cycle Counters	Total Infrastructure	Coordination	Total	
	€500/km	€10,000 per hub (average)	€2,700 per site 1 panel every 30 km	€800 per site 1 site every 15km	2 cycle counters @ €5,000 each	Total Infrastructure Hub Town	20% of hub costs	€	
<b>Wexford</b>	147	73500	10000	13230	7840	10000	114570	22914	<b>137484</b>
<b>Killarney</b>	69	34500	10000	6210	3680	10000	64390	12878	<b>77268</b>
<b>Skibbereen</b>	84	42000	10000	7560	4480	10000	74040	14808	<b>88848</b>
<b>Doolin</b>	19	9500	10000	1710	1013	10000	32223	6445	<b>38668</b>
<b>Clifden</b>	112	56000	10000	10080	5973	10000	92053	18411	<b>110464</b>
<b>Ballyshannon</b>	49	24500	10000	4410	2613	10000	51523	10305	<b>61828</b>
<b>Laragh/</b>									
<b>Glendalough</b>	186	93000	10000	16740	9920	10000	139660	27932	<b>167592</b>
<b>Mullingar</b>	90	45000	10000	8100	4800	10000	77900	15580	<b>93480</b>
<b>Total</b>	<b>378000</b>	<b>80000</b>	<b>68040</b>	<b>40320</b>	<b>80000</b>	<b>646360</b>	<b>129272</b>	<b>775632</b>	

All costs are estimates. Leaflets incorporates a map of routes. Bike stands - 2 No racks per site. Cycle counter includes reading for first year. Coordination includes facilitation and technical expertise.

For a budget of around €780,000 eight towns could be developed as cycling hubs where visitors would be able to spend time cycling on local circular signed routes. These routes would be supported by maps, cycle racks and interpretation panels. The result of this phase of work would provide a quality product capable of being promoted to visitors. It would also provide a stimulus for progressing the remainder of the Irish National Cycle Network to full standard, so once again enabling Ireland to be recognised as providing an excellent cycling experience for visitors.

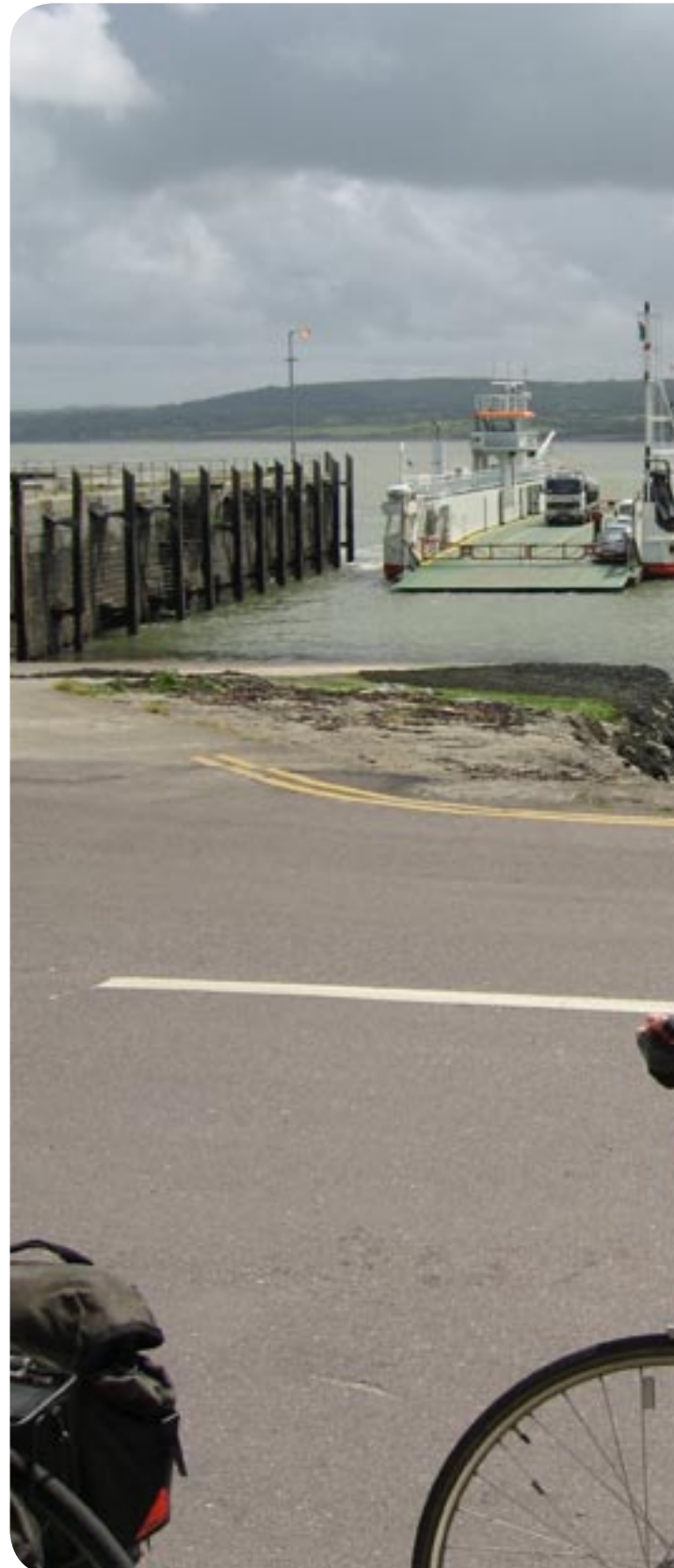
## 6.4 Next Steps

This strategy provides a basis for planning the many interventions that are needed if Ireland is to provide a coherent, attractive, safe and comfortable cycling experience for visitors from home and abroad. In order to expedite the delivery of the strategy it will be important to effectively promote its benefits to those most likely to be able to influence the development of the network.

### 6.4.1 Government Departments and Government Agencies

Some of the immediate next steps will include contact and liaison with key government departments and agencies. These would include the Department of Transport (DoT) with regard to securing approval for newly proposed cycle-specific signage. Initial steps have been taken to gain agreement on this issue.

The project team met with representatives from the Integrated Transportation Unit of the DoT in the closing phases of the project and it is strongly recommended that contact is maintained with this unit since there is a logical link between cycle (tourism) promotion and the development of sustainable transport policies.





It is strongly recommended that contact is maintained with representatives from Irish Rail with a view to facilitating any changes in policy with regard to the carriage of bike on rail carriages and other important elements of proper integration of bicycles and rail.

#### 6.4.2 Local Authorities

It is recommended that contact is re-established with key figures (County Managers and Traffic Engineers) within the local authorities identified as having “Category 1 Potential Cycling Hub Towns”.

#### 6.5 Further Information

The reader is referred to the following complementary reports for further details of every aspect of the strategy:

- Regional Report - South East
- Regional Report - Cork - Kerry
- Regional Report - Shannon
- Regional Report - The West
- Regional Report - North West
- Regional Report – East Coast and Midlands