

2018 ADFC-Travelbike Bicycle Travel Analysis

19th national survey on the bicycle travel market



ADFC-Fachveranstaltungen Fahrradtourismus Internationale Tourismus-Börse ITB Berlin 2018

08.–09. März 2018



Donnerstag, 08.03.2018 | Fachbesuchertag

10.00-11.00 Uhr CityCube Berlin, Raum A 7 Ebene 1

Die ADFC-Travelbike-Radreiseanalyse 2018 Aktuelle Zahlen und Trends

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11.30-12.30 Uhr Hall 4.1 Main Stage

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Successful cycle tourism products: Examples from Germany and beyond

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Panel discussion, chaired by **Ed Lancaster**, ECF

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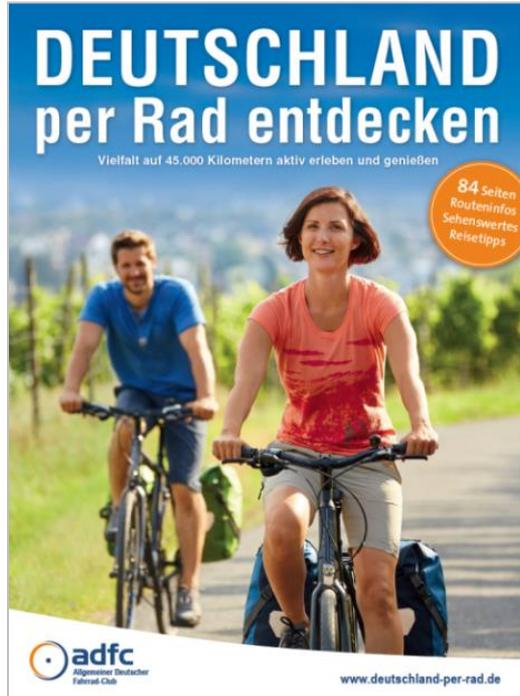
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Foto: ADFC/M. Gloger

ADFC: quality in cycle tourism



www.deutschland-per-rad.de

Cooperation partner: Travelbike

Quality + reliability + safety for your e-bike holidays!

- Rental of top-quality e-bikes throughout Germany and Austria
- Fully comprehensive insurance with no excess
- Expert repair service
- Central online booking portal
- Far-reaching online/offline marketing
- Strong cooperation partners:



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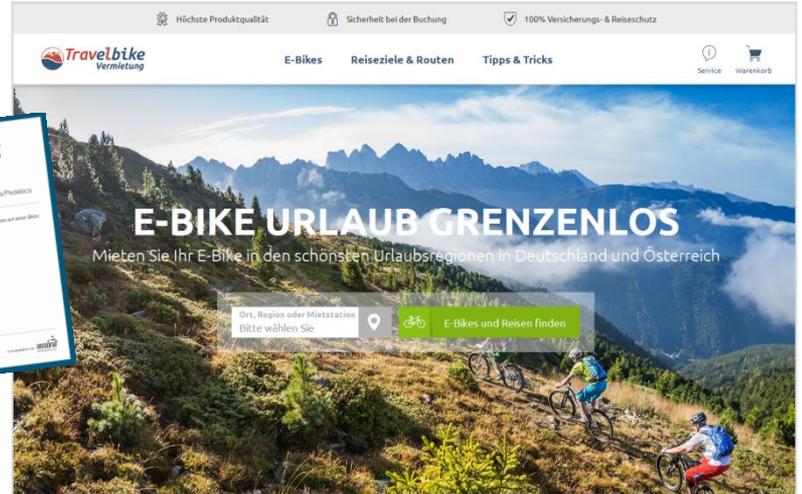


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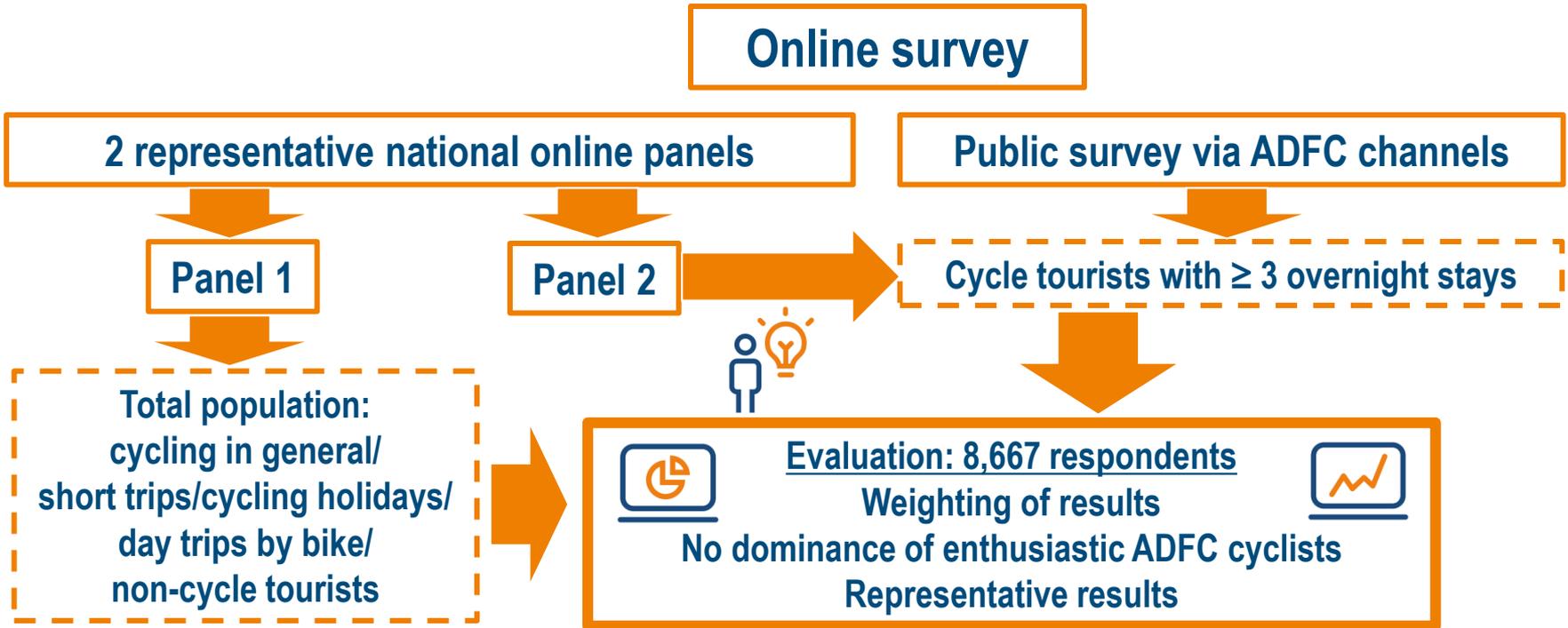
www.travelbike.de



ADFC-Travelbike 2018 Bicycle Travel Analysis



Methodology



Respondents aged 18+

Cycling in general

76% of Germans cycle

(multiple responses possible)

74% daily journeys

51% trips + tours

27% sport



Cycle tourism in 2017

Day trips and short trips offer destinations extensive potential



Cycle tourists
4.3 million
- 17% (5.2 million)



Short trips (+ 0)
4.5 million at the weekend
3.1 million during the week



Day trips
167 million
during leisure time
+ 11% (150 million)

+ 99 million day trips
during a holiday



Day trips

Day trips: preparation



66% recommendations from friends and family



44% internet



Main online sources:



24% cycling maps (print)



81% digital maps



23% brochures from tourist offices



46% tourist offices



21% apps; most popular:



44%



komoot

25%

Day trips: information on the go



60%
signposting



34%
apps



27%
internet



26%
cycling
maps



25%
GPS
device



15%
tourist
office

online

81%
location

65%
route

54%
weather

40%
gastronomy

Day trips: hire bikes and electric bikes

40% of day trippers are interested in hiring a bike. Of these, approx. 50% are interested in electric bikes. 

Key criteria for hire bike offers:

- ✓ High quality
- ✓ Latest models and large selection
- ✓ Good access to offers



Day trips during leisure time: cycling behaviour



68% start from home



32% start from elsewhere



Distance from home:



64% car



23% train



13% public transport

45%: 20–40 km

28%: 40–60 km

25%: < 20 km



Day trips during holidays: motives and activities

Cycle tourists are multioptional active tourists in the region

Motives:



Experience nature (74%)



Do something for health (74%)



Do something with other people (54%)



Actively do sport (47%)

Combined with:



Hiking (66%)



Swimming (60%)



Jogging (26%)



Watersports (17%)



Short trips

Short trips – compared to longer trips

Short trips with up to 2 overnight stays

- Younger target group (Ø 44 years vs. Ø 48 years)
- More women (48% vs. 36%)
- Circular tours more popular (38%)
- Cars most popular mode of transport (43%)
- Greater interest in hire bikes (68%)
- Twice as many mountain bikers (32%)
- Tend to be last-minute, additional holidays
- Other holidays: beach (40%) and family (34%) holidays



Potential of day trips and short trips

17% of the **population not actively involved in cycle tourism** is interested in cycling tours and trips. Of these,

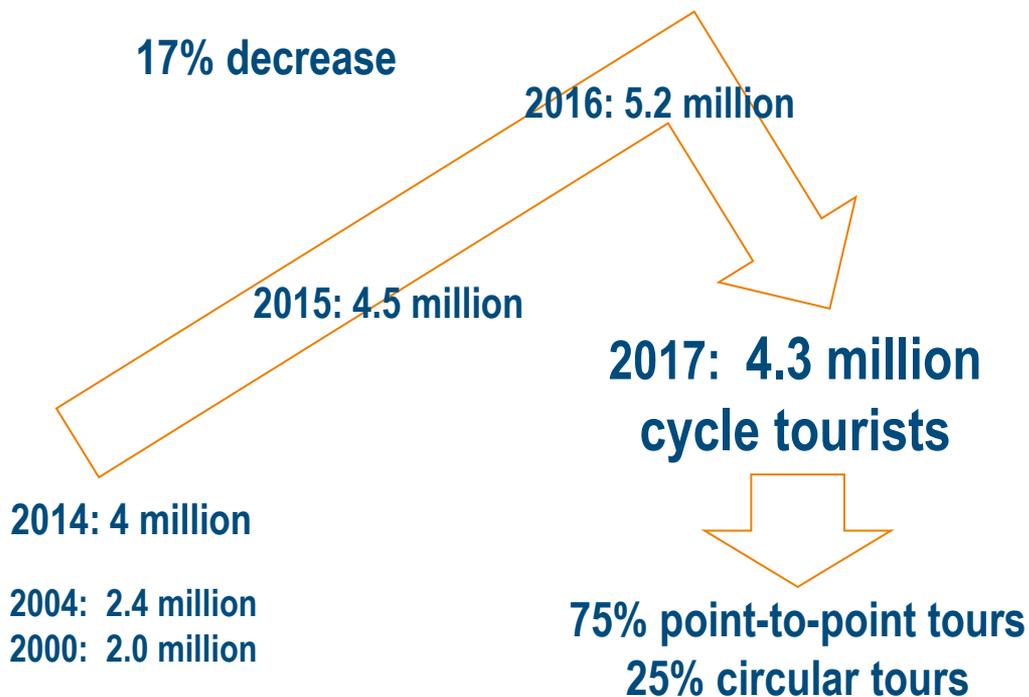
90% are interested
in **day trips**

21% are interested
in **short trips**



Cycle tourism

Cycle tourists



Rain and extreme weather in summer 2017



- Spontaneous travel decisions
- More short trips and tours
- Cycle tourism a permanent topic



- Develop flagship projects
- Prepare regions
- Synergies between active offers

77 %

No cycling holiday in 2017
but planning one in 2018!

Cycle tourist profile

Sociodemographics

- Ø 48 years old
- 47% 45–64 years old
- 52% travel with partner
- 35% travel with friends
- 19% travel alone
- Ø household size:
2.3 people, often no children



Bike used

- 75% touring/trekking bike
- 18% mountain bike
- 7% racing bike

Increase in electric bikes to 18% (13%)



Cycling trips

Holiday type

65% additional holiday
35% main holiday

When?

Early summer most popular
Cycling holiday season: Apr–Sept

How long?

Ø 8 overnight stays
 $\frac{2}{3}$ up to one week
 $\frac{1}{3}$ longer than one week



Sources of information



Preparation

86% internet → TOP: tourist office + digital maps
49% printed maps
43% print materials from tourist office
30% apps



Follow-up

87% reports to friends
24% social media
3% travel forums
3% blogs



On the go

74% signposting
60% cycling maps
50% internet →
42% GPS device



Cycling trip organisation



84% individual travel

16% package holiday

92% with own bike



Accommodation

57% hotel

47% B&B

19% camping/caravanning

14% holiday home



75% point-to-point tours:

Ø 7 stages with Ø 64 km

Ø 9 nights



25% circular tours:

Ø 6 cycling days with Ø 55 km

Ø 6 nights



Travel to/from cycling destination

36% train / 36% car

20% bicycle

4% plane

3% long-distance bus

2% motorhome

Combination of activities



+



68% visits to cultural sights



33% hiking/walking



32% swimming



16% spa and health offers

Potential

- **87 %** of cycle tourists in 2017 want to complete a trip again in 2018
- **21 %** planning a cycling trip in 2018, but don't have concrete plans yet
- **7%** of non-cycle tourists are interested in going on a cycling trip
- **99 million** day trips during a holiday
 - activation for longer cycling holidays in regions

Quality ... quality ... quality ...

- Trend towards cycle tourism remains
- Greater diversification of demand for cycle tourism
- Quality of offers rated as positive; potential exists to improve signposting and travel to/from destinations
- Travel experience and expectations growing

Growth drivers:



- Refine profile and presentation
- Coordination and cooperation
- Quality offensive in the regions
- Synergies with other types of active holidays
- Investments in quality pay off



ADFC awards at the ITB 2018



ADFC-Travelbike 2018 Bicycle Travel Analysis



3 stars:



Eder Cycle Route (171 km, HE)

Moated Castles Route (467 km, NW)

**Heidelberg-Black Forest-Lake Constance
Cycle Route** (305 km, BW)



Promoted to 4 stars:

Neckar Valley Cycle Route (366 km, BW)

Kocher-Jagst Cycle Route (335 km, BW)

Vennbahn (130 km, NW + abroad: B/L)

Saarland Cycle Route (353 km, SL)

NEW ADFC Bicycle Travel Region: Wesermarsch (840 km, NI)



Routes and regions

Most popular cycle routes in Germany

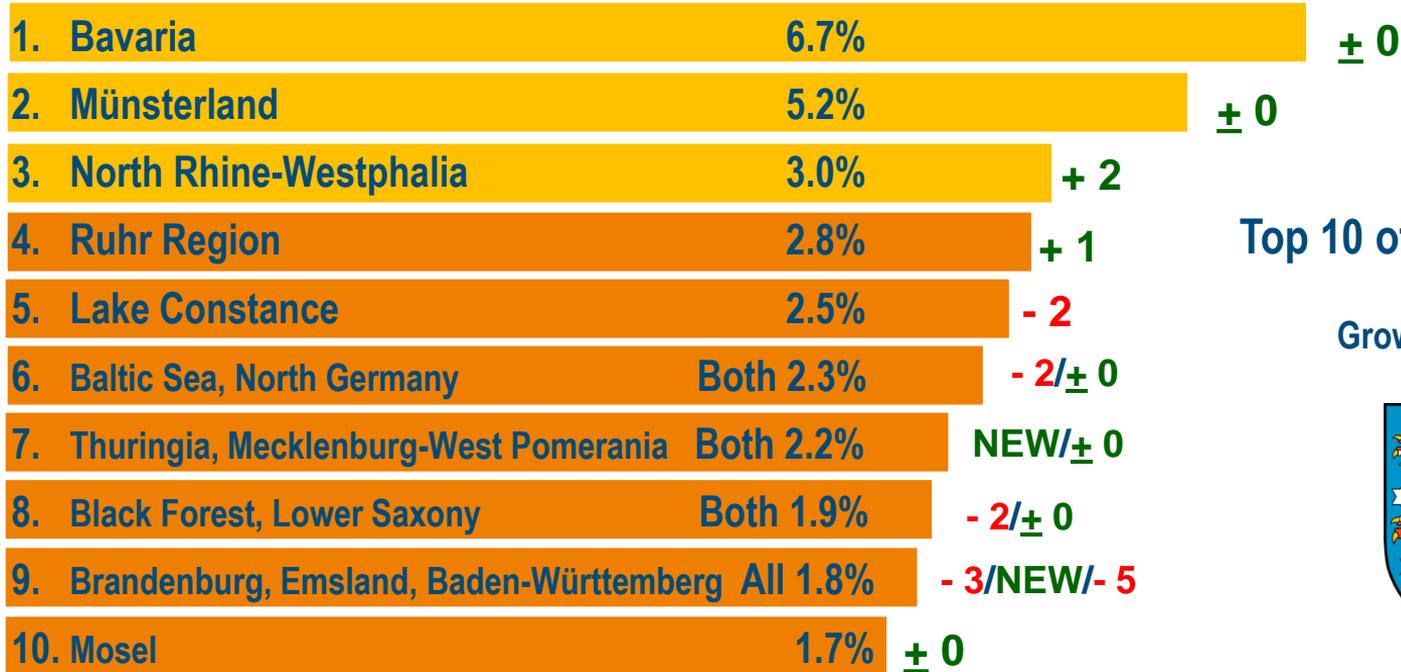


Top 10 of 137 cycle routes



in% / ± comparison to 2017

Most popular cycle regions in Germany



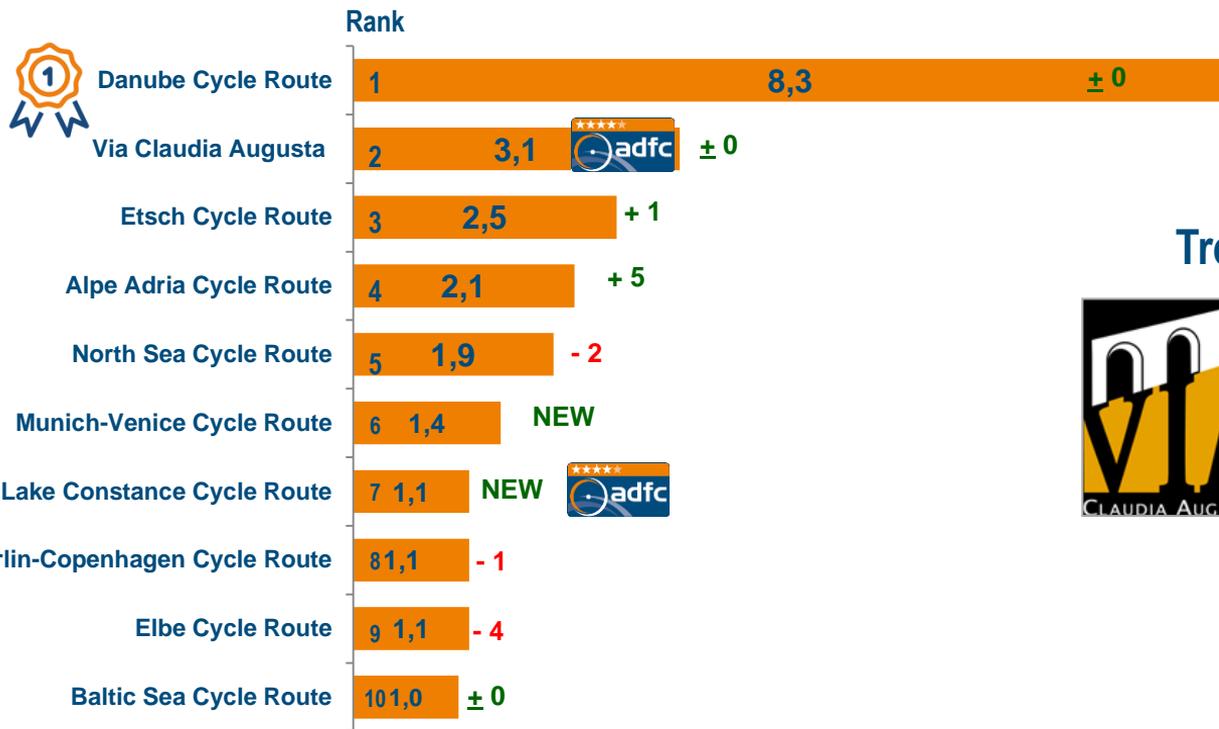
Top 10 of 171 regions

Growing popularity:
Thuringia



in% / ± comparison to 2017

Most popular cycle routes abroad

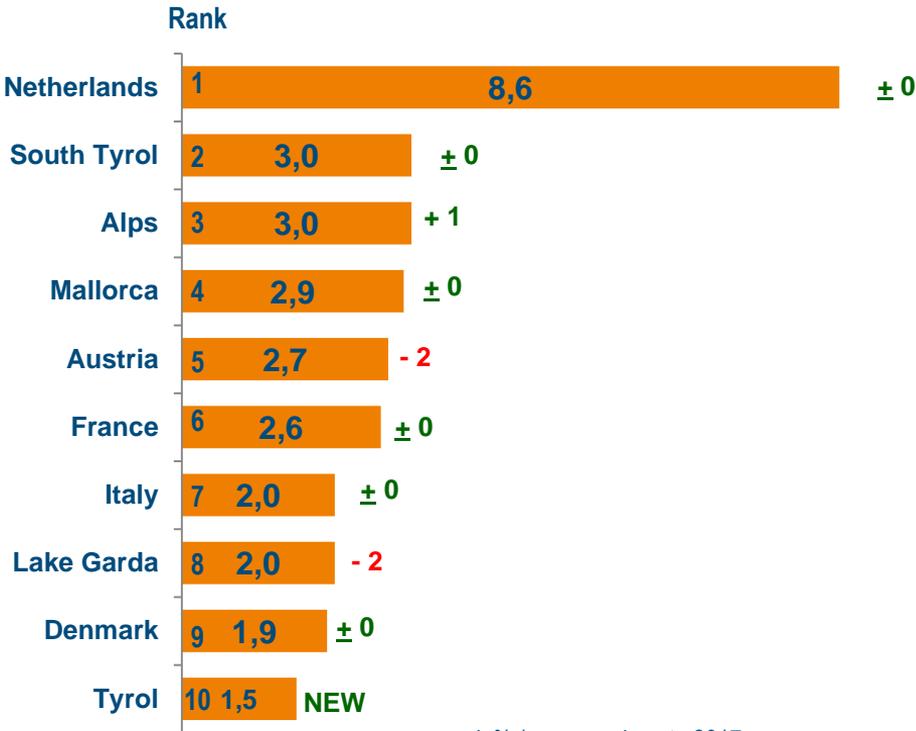


Top 10 of
77 destinations

Trend: Alp crossings



Most popular cycling regions abroad

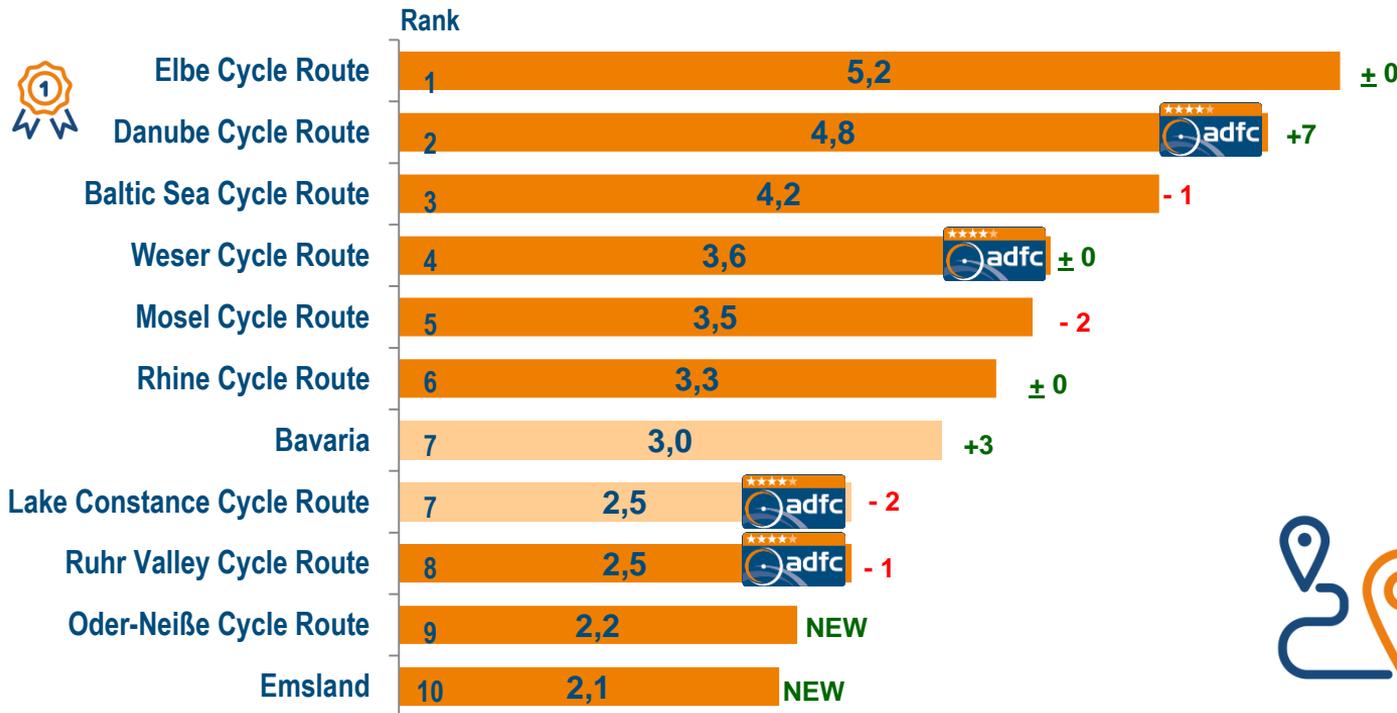


Top 10 of 136 regions

Regions ranked very closely from second place and diverse offers: Germans are experienced cycle tourists with high quality expectations.

in% / ± comparison to 2017

Plan for 2018: travel destinations in Germany



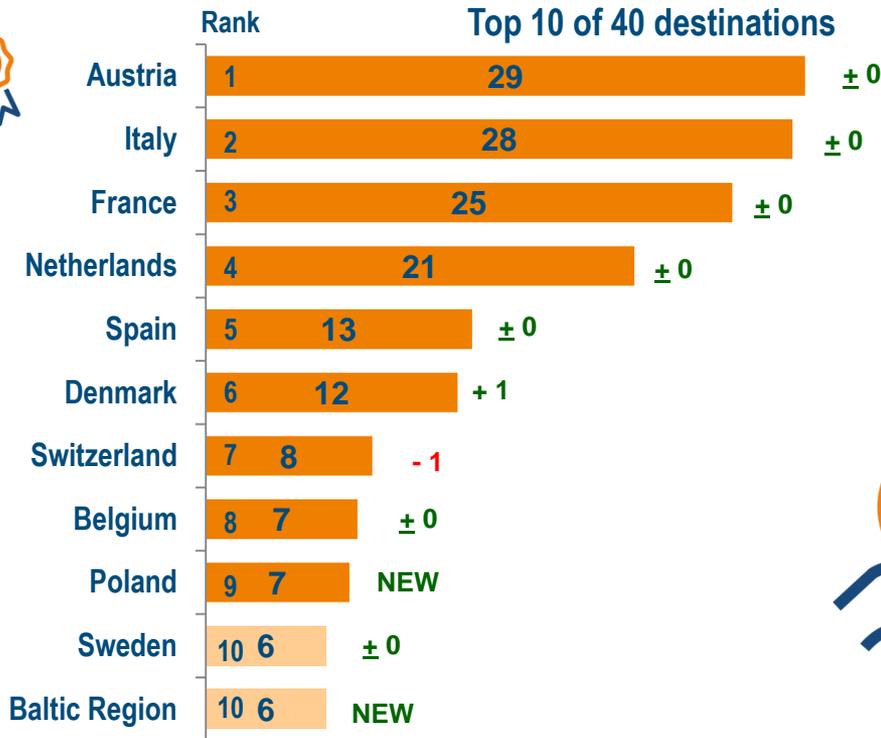
Top 10 of
242 destinations



Multiple routes available

in% / ± comparison to 2017

Plan for 2018: travel destinations abroad



in% / ± comparison to 2017

Multiple routes available

Everyday cycling

88% of cycle tourists also cycle in their daily lives

Cycling on holiday influences daily bicycle usage:

29% cycle more in their daily lives after their cycling trip!

FAHRRADLAND
DEUTSCHLAND.
JETZT!





Thank you for your attention!

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