

#MEHRPLATZFÜRSRAD

ADFC Bicycle Travel Analysis

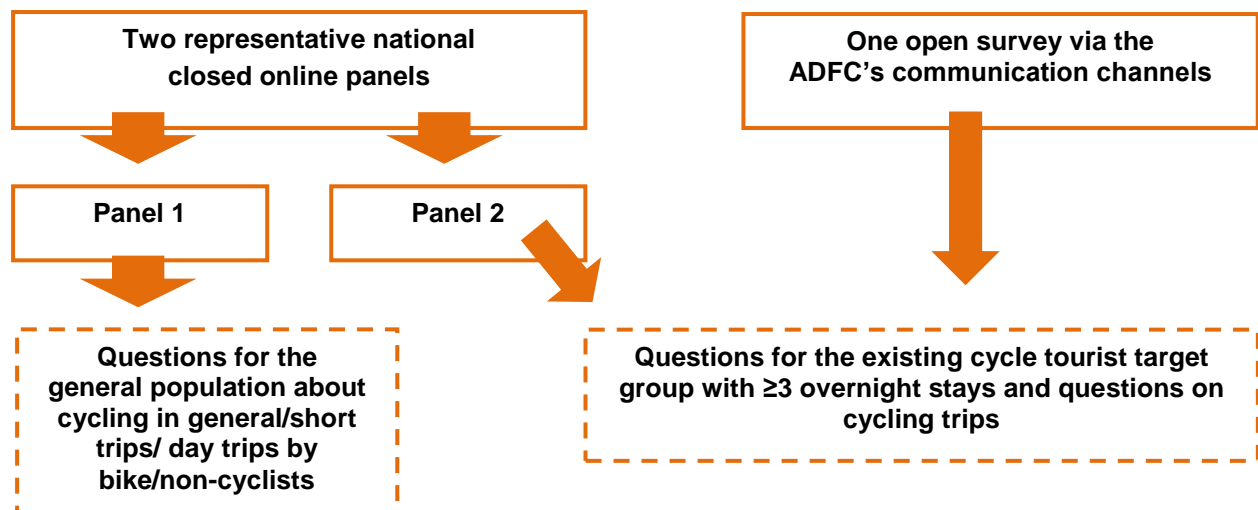
2020

2020 ADFC Bicycle Travel Analysis

Methodology

- Survey period: every year, from November to January
- Two national panels and one open survey via ADFC channels
- Depending on the panel, between 60 and 90 questions
- Completion time of 20–30 minutes

The survey is based on a total of three online surveys and involves two different approaches:



Evaluation:
The two survey formats are weighted to ensure that ADFC members do not skew the results and a representative outcome is achieved.

The ADFC Bicycle Travel Analysis defines “cycle tourists” as follows:

A cycle tourist is someone who has gone on at least one trip lasting at least three nights in the past three years during which cycling was one of the main motives.

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- Panel 1: National representative online panel; 1,789 participants with 1,242 evaluable interviews
- Panel 2: Second national representative online panel to obtain at least 1,000 cycle tourists for the evaluation; 2,659 participants
- Survey: Open survey via the ADFC's communication channels with 4,414 evaluable questionnaires

There were a total of 8,122 evaluable questionnaires.

Since most of the data from the ADFC's communication channels is obtained from cycling enthusiasts (proportion of ADFC members: 42%; in comparison, proportion of ADFC members in the national sample: 4.5%), this data was weighted less in order to avoid any skewing of the results due to these more active cyclists.

Where data is also available from the Bicycle Travel Analysis completed in the previous year (survey period: 2018), this has also been provided in brackets. If a comparison is not possible or meaningful (altered response options, too few respondents), no comparison has been made.

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Cycling day trip and holiday volumes

- Cycling in general:** 77% of Germans cycle occasionally to regularly. Of those who cycle, 74% use their bicycle for daily journeys, 55% also for cycling trips and tours, and 29% for sports purposes.

Figure 1: Do you cycle?
(Unweighted n=1,637; in %)

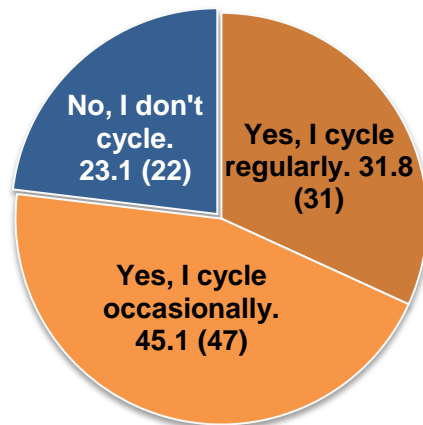
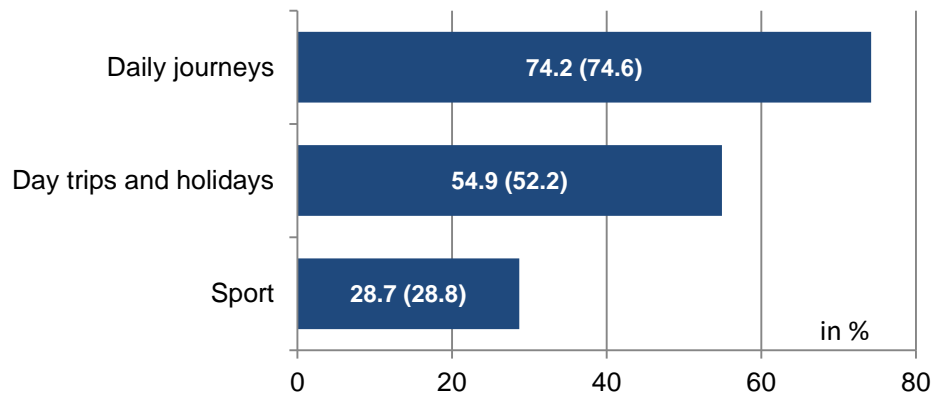


Figure 2: What do you use your bicycle for?
(Only respondents who cycle; unweighted n=1,244)

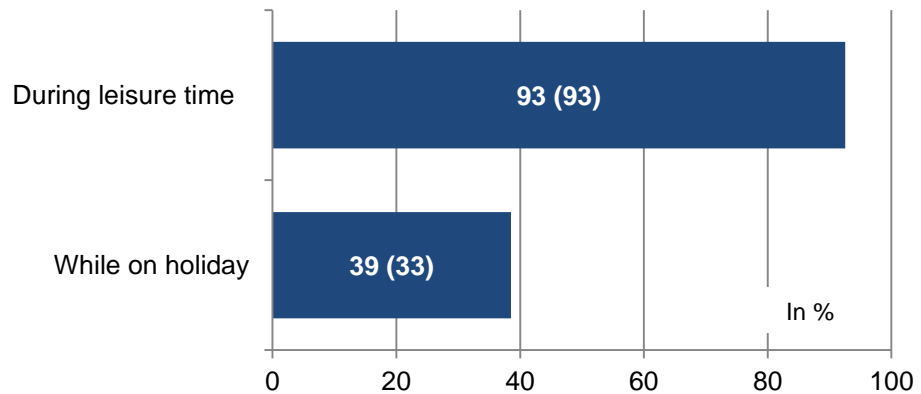


2020 ADFC Bicycle Travel Analysis

- **Cycling trips:** In 2019, 64% of the cycling population went on at least one cycling day trip.
- 93% of day trippers completed their trips during their leisure time and departed from home.
- 39% went on a cycling day trip while on holiday. This constitutes an increase of 6% compared to the previous year.

Figure 3: Did you go on the cycling day trips during your leisure time or while on holiday?

(Only respondents who went on a cycling day trip; unweighted n=787)

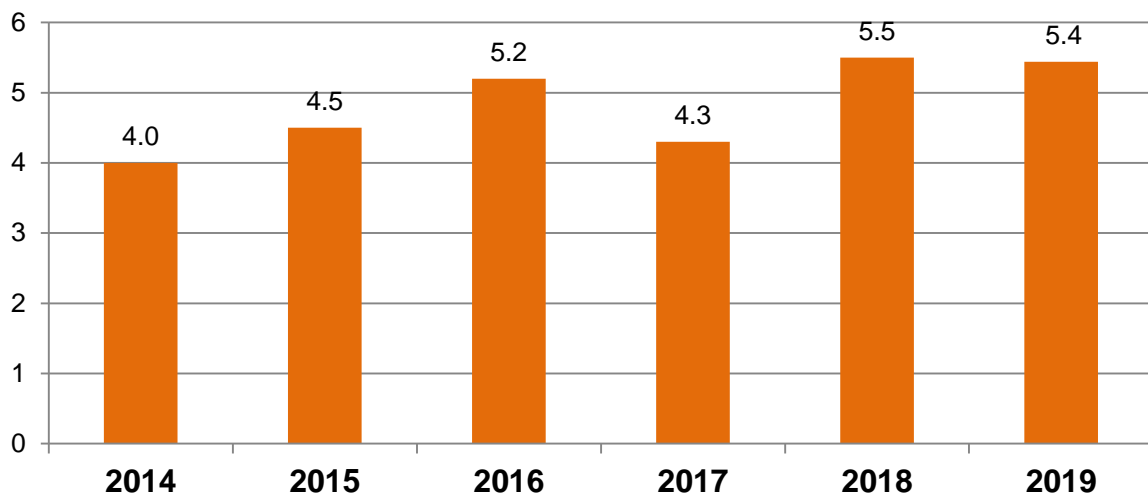


- Approximately 34.3 (32.5) million people went on at least one cycling day trip during their leisure time or while on holiday.
- The average number of trips remains largely unchanged compared to the previous year: in 2019, people went on an average of 10 (2018: 11) cycling day trips during their leisure time.
- As in 2018, they went on an average of 5 day trips while on holiday.
- A total of **330 million day trips** were completed during leisure time departing from home by people, who either only went on day trips during their leisure time or went on day trips during their leisure time and while on holiday.
- In addition, around **62 million day trips** were completed during a holiday.
- More detailed information has now been obtained compared to 2018 about the group of people who went on cycling day trips during their leisure time and while on holiday. Hence the absolute numbers of day trips cannot be compared. It can be noted, however, that the number of day trippers has increased by about 2 million people compared to 2018.

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- **Cycle tourists:** Taking the population as a whole, 17% of cycle tourists went on at least one cycling trip with a minimum of three overnight stays in the past three years.
- **2019:** 8% of cycle tourists from the total population aged 18+ went on at least one cycling trip in 2019 – this corresponds to 5.4 million people. This high figure remains largely unchanged compared to 2018. (2018: 5.5 million).

Figure 4: Number of cycle tourists (millions)



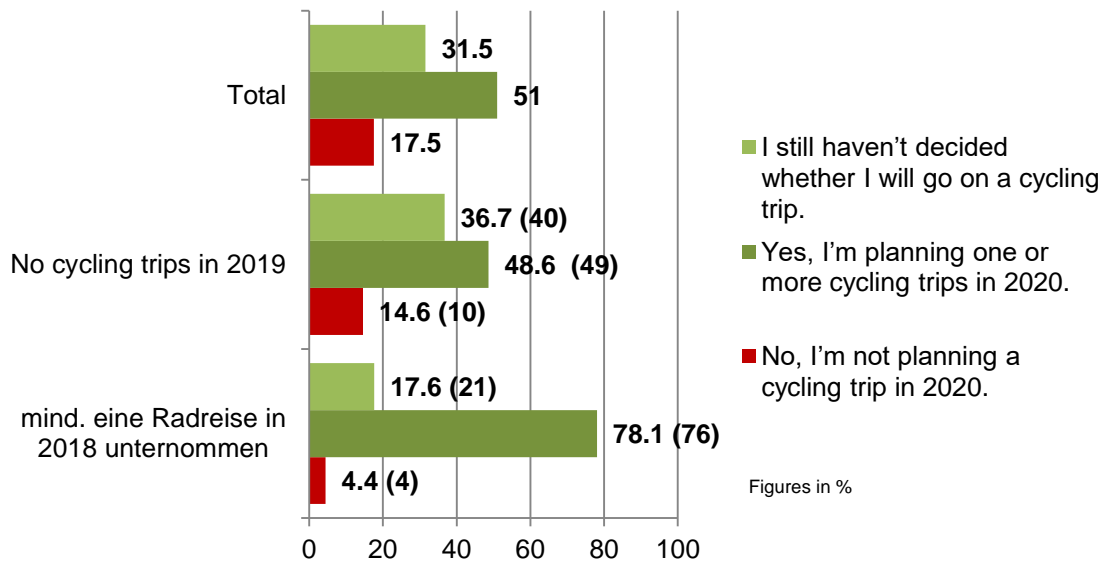
- **Short cycling trips:** Involve a maximum of 2 overnight stays. 5.2 million people went on a **short cycling trip during the week** (2018: 4.1 million). This represents an increase of 0.8 million or approx. 13%.
- The number of people to go on a short cycling trip at the weekend increased substantially to 6.8 million people (2018: 6.1 million) – an increase of 1.1 million or approx. 28%.

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- Potential:** 78% (76%) of cycle tourists, who went on a cycling holiday in 2019, want to do so again in 2020. As many as 49% of cycle tourists, who did not go on a cycling holiday in 2019, want to go on a cycling holiday in 2020. This figure remains unchanged compared to 2019.

Figure 5: Cycling trip planning for 2020

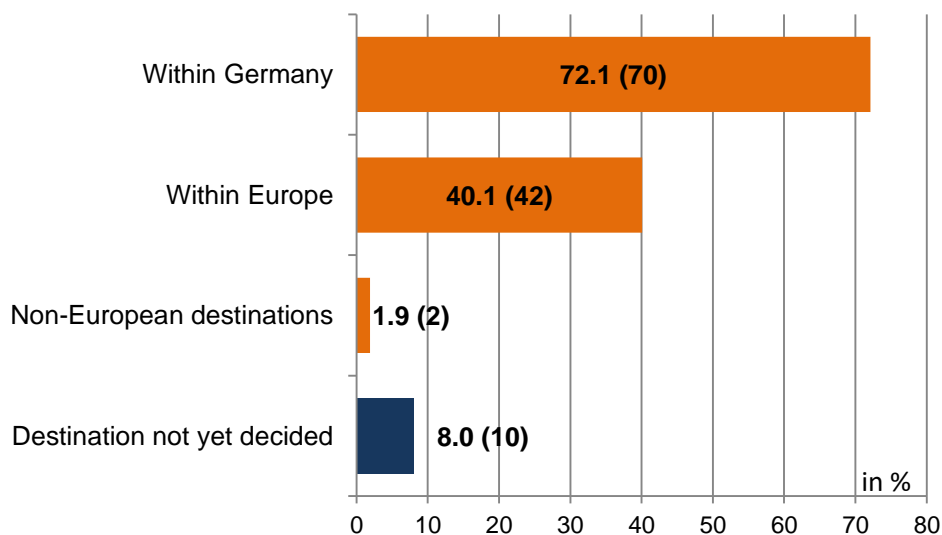
(All cycle tourists [target group]; n=5,869)



Planning for 2020: Approx. 72% of respondents are planning a cycling trip within Germany in 2020. Germany therefore is and remains the most popular destination among cyclists (2018: 70%). Approx. 40% were interested in other European countries as potential travel destinations (2018: 42%). With around just 2%, destinations outside of Europe and overseas play only a negligible role. 8% still haven't decided yet where they want to go (2018: 10%).

Figure 6: Where will you go on cycling trips in 2020?

(Only respondents planning a cycling trip in 2020; n=3,297) / Compared to 2018



2020 ADFC Bicycle Travel Analysis

Trip behaviour

- **Start:** 54% (61%) of day trips start directly from home and 46% (39%) from another location. If day trips start from another location, 60% (68%) of respondents use a car as their means of transport, 25% (20%) use the train and 16% (12%) use local public transport.
- Approx. 55% (41%) drive more than 60 km and around 21% (13%) even more than 100 km to reach their trip starting point. The average distance to the day trip starting point thus increased in 2019 compared to 2018.
- 85% (81%) of day trippers travel routes that they have planned themselves. However, 79% of them would prefer ready-made route suggestions.
- If day trips were completed while on holiday, then they were mainly within Germany. In terms of the individual regions of Germany, these were especially on the Baltic Sea coast, in Bavaria and in the North Sea coastal region.
- **Information:** For 73% (63%) of respondents, the internet is the most important information source when it comes to preparing for cycling trips. The use of apps on smartphones and tablets has increased significantly to 38% (29%).
- When **on the go**, signposting is most important during cycling trips, being used by 63% (63%) of cycle tourists.

Figure 7: Which information sources do you mainly use to plan your day trips?

(Only respondents who used apps to prepare for their trip; unweighted n=1,179)

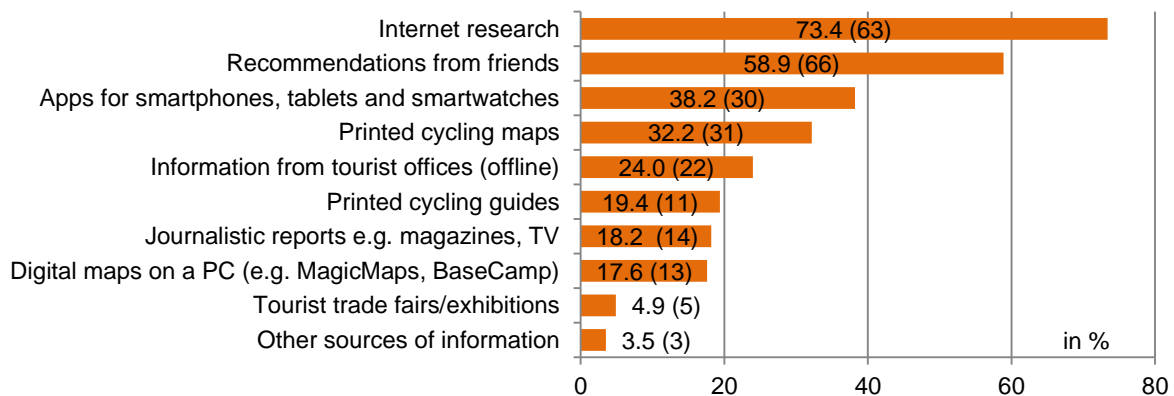
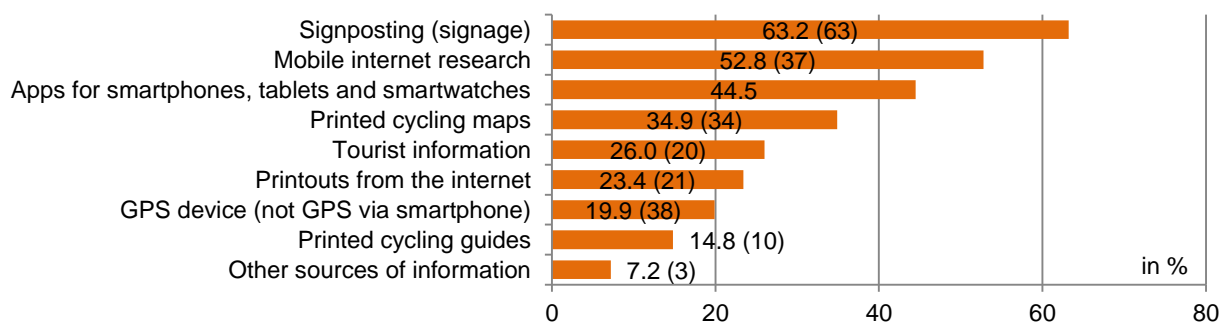


Figure 8: Which information sources and media do you use during cycling day trips, e.g. for orientation?

(Only respondents who went on cycling day trips, but not cycling holidays; unweighted n=1,244)



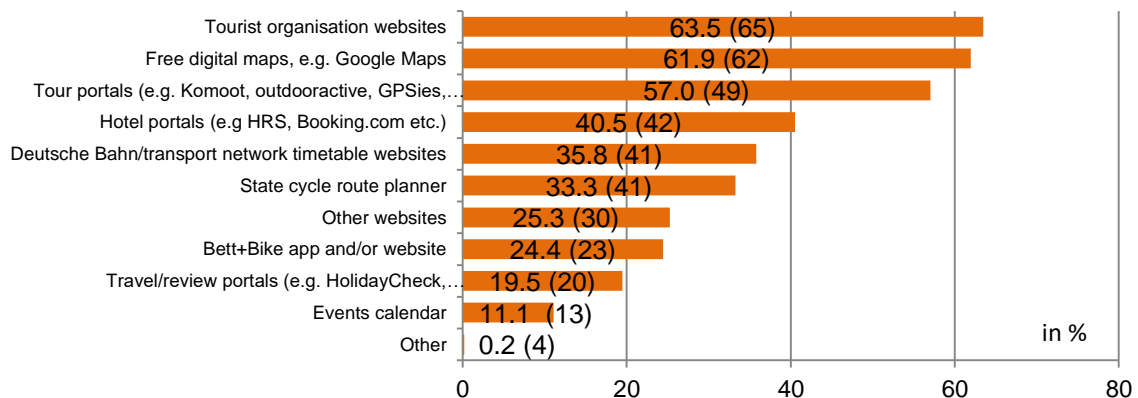
2020 ADFC Bicycle Travel Analysis

Travel behaviour

- **Age:** On average, cyclists are 53 (52) years old. The 45–64 years age group is most strongly represented (50% (49%)), followed by the 25–44 years age group (28% (26%)). 20% (22%) are aged 65+.
- **Preparation:** Cycling trips are generally planned at relatively short notice. About every second cycle tourist has decided on their destination about two months prior to their departure.
- **Trip duration:** Cycling trips comprise an average of 7 (8) overnight stays – this has remained relatively constant. Most cycling trips are shorter trips lasting up to seven nights (73% (70%)). About one third are short trips only lasting up to three nights.
- **Travel period:** Most cycling trips start in the early summer: almost two thirds of all cycling tours start in May, June or July, with June being the most popular month of travel (23%). About 30% of all bicycle tours start in August or September. This distribution has remained constant over the last three years.
- **Information:** In terms of preparation, the internet is still the most important source of information for cycling trips (83%), followed by personal recommendations (49% (46%)) and printed maps (43% (47%)). Apps for smartphones and tablets have grown significantly in their importance (36% (27%)).
- When the **internet was used to research**, the websites of tourism organisations were accessed most frequently (64% (65%)), closely followed by free digital maps such as Google Maps (62%). The use of tour portals such as Komoot and Outdooractive has increased to 57%.

Figure 9: Which internet sources do you use to prepare for your cycling trips?

(Cycle tourists only; n=2,839) / Compared to 2017 (if asked)

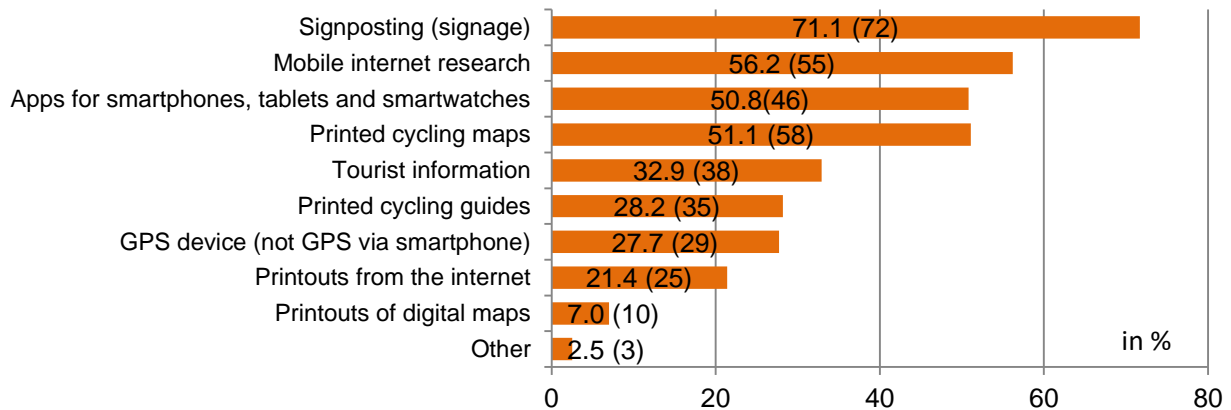


- When **on the go**, cyclists mostly use signposting to orientate themselves. Apps play a major role for around 51% (46%). The Komoot (44% (32%)) and Google Maps (32% (30%)) apps are used the most frequently. The weather is checked, distances calculated and accommodation sought online.

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Figure 10: Which information sources and media do you use during cycling trips, e.g. for orientation?

(Cycle tourists only; n=4,008) / Compared to 2018 (if asked)



- **Main/additional holiday:** For 65% (64%), the cycle trip was an additional holiday; for 35% (36%) it was the main holiday. If the cycling holiday was the main holiday, it comprised an average of 10 overnight stays. If it was an additional holiday, then it involved just 5 overnight stays.
- **Trip organisation:** Most cycle tourists (86% (88%)) organised their trip for themselves. 14% went on a package holiday, whereby roughly the same number of trips were organised entirely or at least in part by a tour operator.
- **Type of cycling trip:** 28.5% (28%) of cycling trips in the region were from a fixed base (“circular tour”) and 71.5% (72%) were along a cycle route with changing accommodation (“point-to-point tour”).
- **Travel companion:** Cycle tourists are mainly accompanied by their partner (53% (52%)) or friends (30% (31%)). 20% (21%) travel alone. 17% (19%) of cycling trips are completed in a small group of up to five people. 6% completed a cycling tour with children under the age of 14.
- **Type of bicycle:** The majority use a touring or trekking bike (67% (70%)). 18% (16%) use a mountain bike, around 9% (9%) a city bike and 6% (6%) a racing bike. Overall, 29% (23%) of travellers used an e-bike – a significant increase compared to the previous year. The proportion of rental bikes lay at 7% (5%).
- **Travel to/from the cycling destination:** The most important means of transport for travel to and from the cycling trip starting point or destination are car and train (car: 40% (40%); train: 34% (36%). Cars have grown slightly in popularity in recent years (increase from 36% to 40%).
 - **Long-distance rail travel:** In 2019, Deutsche Bahn transported 393,516 bicycles (2018: 351,360) – a plus of around 12%. (*DB Fernverkehr AG*)
 - **Coach travel:** The number of bicycles transported by coach increased further. In 2019, FlixBus transported 121,175 bicycles (2018: 112,000) – an increase of around 8%. (*FlixBus*)
- **Quality of offers:** The quality of the German regions and long-distance cycle routes is assessed as positive overall. The only aspect for which the assessment was less positive was the arrival/departure at the destination using public transport. In many cases, this was not possible without problems. The main criticisms here were a lack of space aboard vehicles and bicycle-unfriendly stations.

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- In 2019, cycle tourists completed countless different cycle routes in Germany and abroad. Overall, they were very satisfied with their cycling tours and trips: around 84% of cycle tourists would recommend their destination or route without any reservations.
- Taking all cycle tourists into account, the vast majority (81%) completed cycle tours within Germany. That being said, about one third (33%) ventured abroad for a cycling trip.
- The travel destinations visited are discussed below, with the most popular ones represented in the graphs. The question of which federal states were visited was asked for the first time in 2019, hence the regions mentioned have changed.

Most popular German federal states for cycling in 2019

Figure 11: Now consider **all** of the multi-day cycling trips you completed in 2019. Which German federal states did you cycle in?

(Cyclists who went on cycling holidays in Germany; n=2,802)

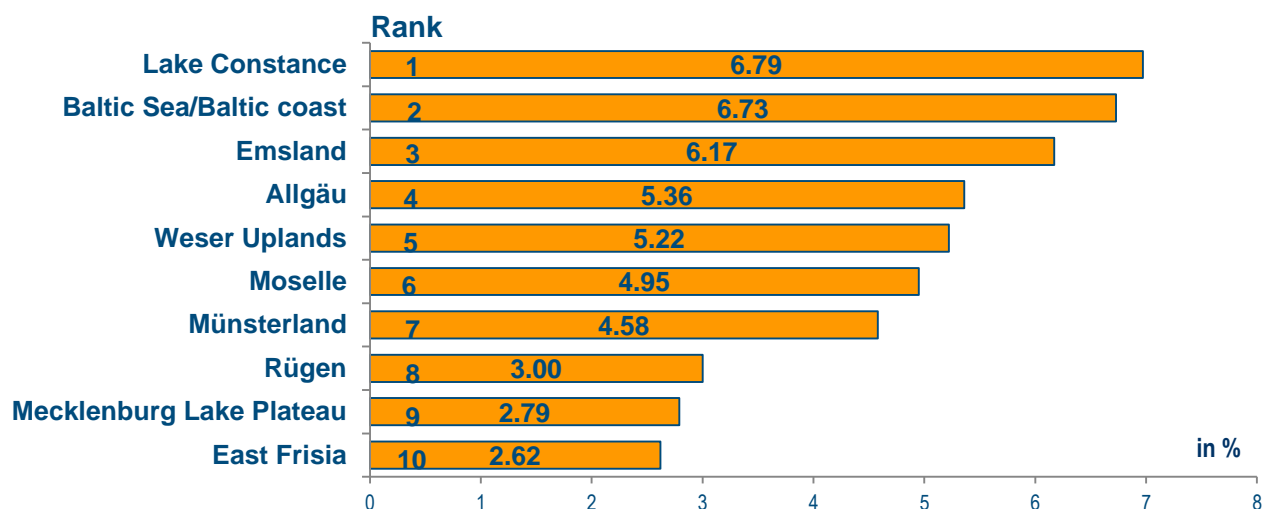


Most popular cycling regions in Germany in 2019

When asked about the regions visited, the main regions mentioned were Lake Constance, the Baltic Sea coast as well as Emsland and the Allgäu. Coastal regions, rivers and low mountain ranges are therefore all represented in the top ten.

Figure 12: Now consider **all** of the multi-day cycling trips you completed in 2019. Which cycling region(s) did you visit during your cycling trips in 2019?

(Cycle tourists: n=536)

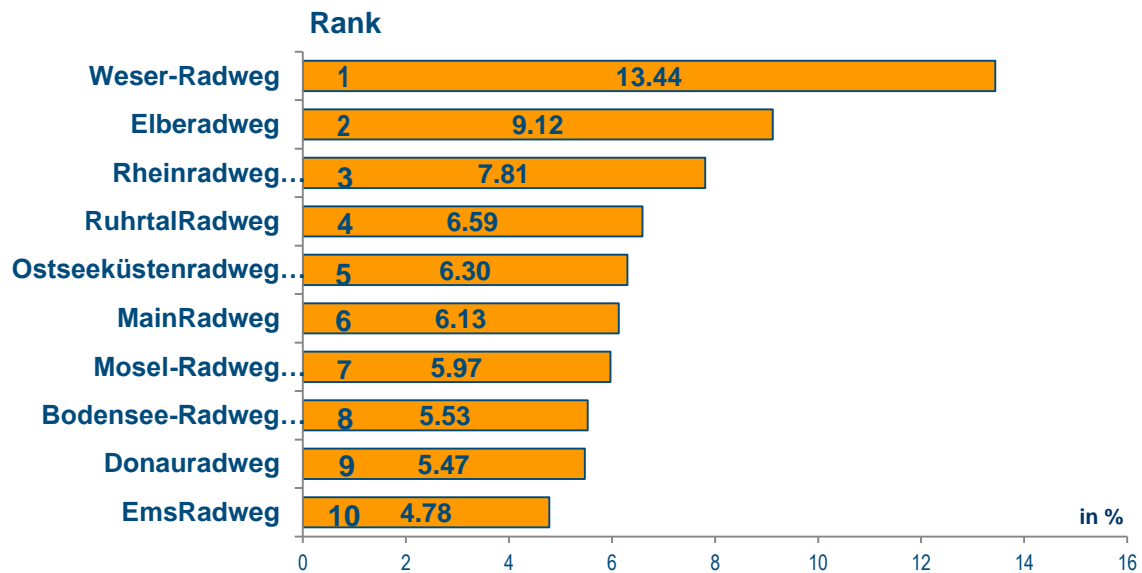


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Routes cycled in Germany in 2019

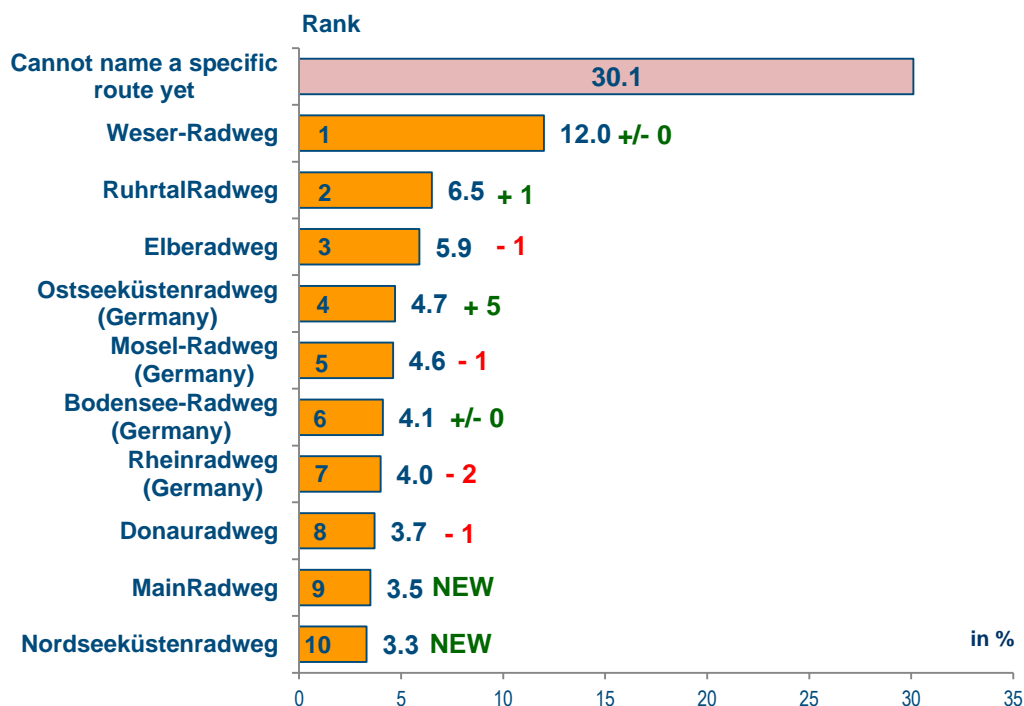
In terms of the number of cycle routes completed in Germany, the top ten remains relatively stable. However, the Weser-Radweg has a clear lead over the next most popular routes mentioned. The figures for the routes ranked 2 to 10 are all very similar.

Figure 13: Routes cycled in Germany in 2019
(Cycle tourists; n=2,681; 208 routes mentioned) / Compared to 2018



Destinations planned in Germany

Figure 14: Destinations in Germany planned for 2020
(Cycle tourists; n=2,229; 132 destinations mentioned)

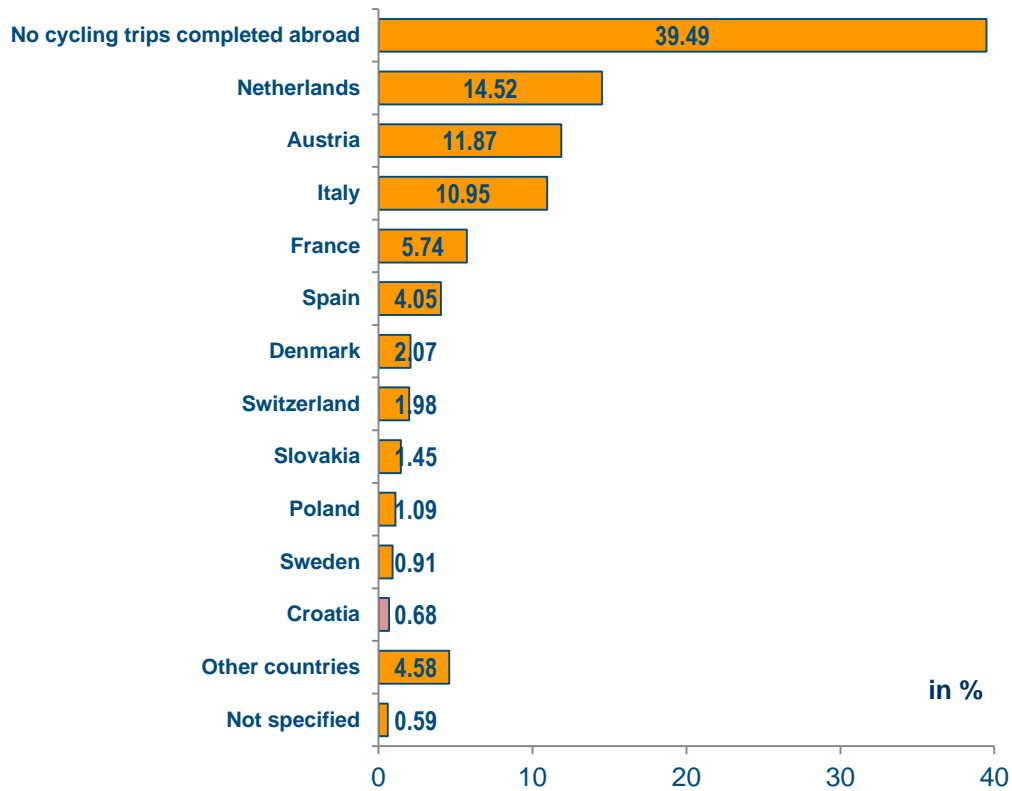


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Foreign countries visited in 2019

If only trips abroad are considered, the Netherlands, Austria and Italy are the most popular cycling destinations.

Figure 15: Which countries outside of Germany do you most like to go on cycling holidays in?
(Cycle tourists: n=3,651)

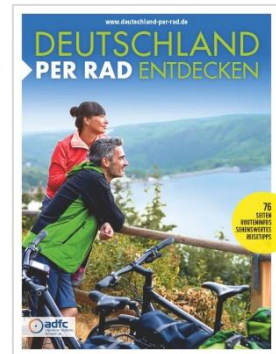


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The ADFC and cycle tourism

Discover Germany by Bike

With 'Deutschland per Rad entdecken', the ADFC provides inspiration for future cycling trips and promotes cycle tourism within Germany. The thirteenth edition will be published in January 2021. Interested routes, regions and federal states have until 9 April 2020 to register. For more information, see: www.adfc.de/artikel/deutschland-per-rad-entdecken



With the combination of a brochure, online presence and accompanying marketing activities, 'Deutschland per Rad entdecken' is the most successful national marketing platform for German cycle tourism and the market leader in the bicycle travel brochure segment.

The German National Tourist Board (DZT) advertises attractive cycling destinations in Germany abroad on www.germany.travel/radfahren and enjoys a long-standing cooperation with the ADFC.

4 routes with



22 routes with



10 routes with



6 certified regions



ADFC Quality Routes and ADFC Bicycle Travel Regions

The ADFC has awarded quality seals to long-distance cycle routes since 2006 and to bicycle travel regions since 2013. The following routes and regions were honoured at the ITB 2020:
(* Re-certified)

3 stars: Paderborner Land Route*, Südschwarzwald-Radweg*

4 stars: Weser-Radweg*, Saar-Radweg*, Glan-Blies-Radweg*, DonauTÄLER-Radweg*, Radrunde Allgäu*, Radweg Deutsche Donau*

Regions: HeideRegion Uelzen*. The Inn-Salzach region has been named a new ADFC Bicycle Travel Region.

There are currently

37 ADFC Quality Routes and

6 ADFC Bicycle Travel Regions with around **12,000 km**

Bett+Bike

5,800 bicycle-friendly hosts meet the ADFC's quality criteria and have been certified as Bett+Bike establishments. A wide network is available for cycle tourists to plan cycling holidays in seven different countries. Since 2019, it has also been possible to book most of the accommodation offered at Bett+Bike establishments online.



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Radurlaub

The ADFC presents its 'Radurlaub' brochure for 2020 featuring 90 ideas for holidays in Germany, Europe and worldwide from 42 reputable cycling trip organisers. It is also available online at www.radurlaub-online.de.



ADFC Dachgeber

The ADFC 'Dachgeber' is being published for the thirty-third time since its introduction in 1987. The directory of private accommodation offered according to the principle of reciprocity currently contains 3,236 addresses and a total of 17,680 free accommodation offers.