

# ADFC Bicycle Travel Analysis 2021



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German National Cyclists' Association  
Allgemeiner Deutscher Fahrrad-Club e. V. (ADFC)  
Mohrenstraße 69, 10117 Berlin, Germany  
Website: [www.adfc.de](http://www.adfc.de)

### Market research institute:

T.I.P. BIEHL & PARTNER GbR, Markt- und Tourismusforschung  
Eurener Straße 15, 54294 Trier, Germany  
Website: [www.tip-web.de](http://www.tip-web.de)

### Sponsor:

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### Contacts:

ADFC national headquarters  
Janine Starke  
Head of Tourism  
[janine.starke@adfc.de](mailto:janine.starke@adfc.de)  
+49 30 2091498-59

T.I.P. BIEHL & PARTNER GdbR  
Dr. Bert Hallerbach  
Director  
[bert.hallerbach@tip-web.de](mailto:bert.hallerbach@tip-web.de)  
+49 651 94800-16

## 2021 ADFC Bicycle Travel Analysis

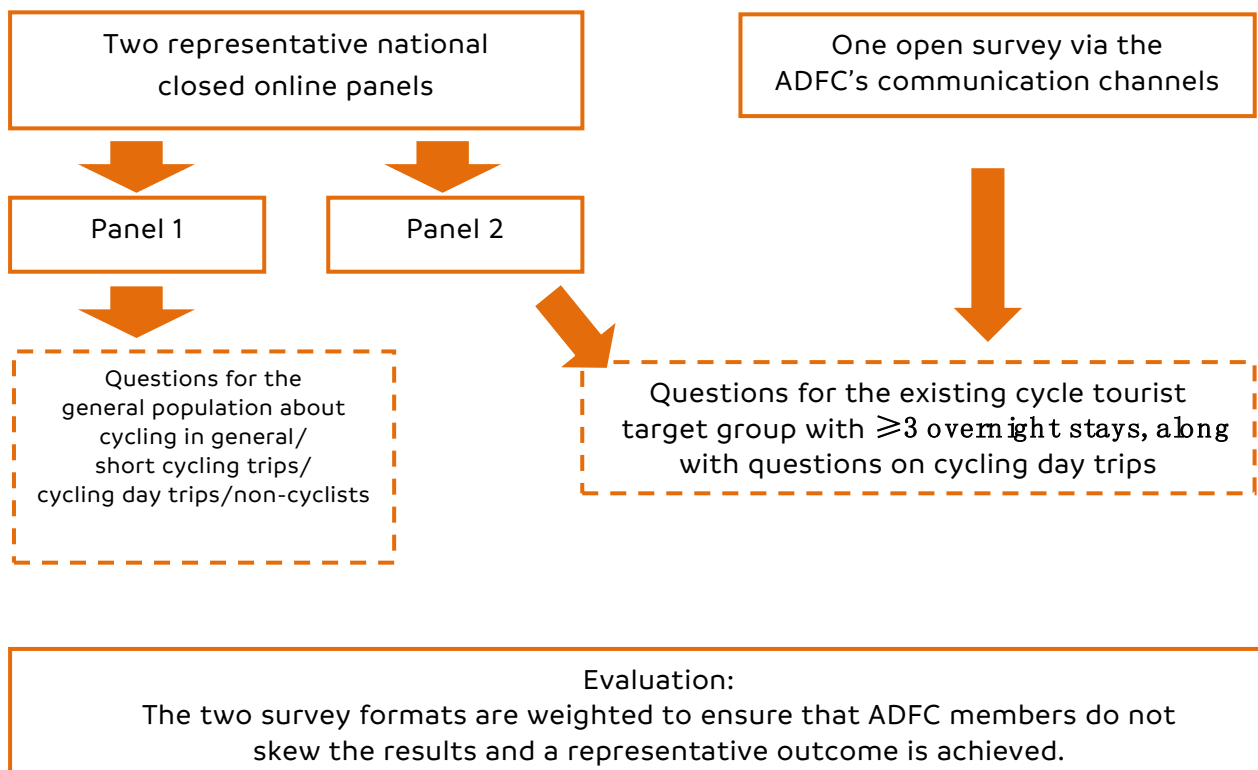
### Definition of cycle tourism

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.

### 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:



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- Panel 1: National representative online panel with 1,184 evaluable questionnaires.
- Panel 2: Second national representative online panel to obtain at least 1,000 cycle tourists for the evaluation with 2,346 evaluable questionnaires.
- Survey: Open survey via the ADFC's communication channels with 7,162 evaluable questionnaires

There were a total of 10,692 evaluable questionnaires, which constituted an increase of more than 2,500 questionnaires compared to the previous year.

Since most of the data from the ADFC's communication channels is obtained from cycling enthusiasts (proportion of ADFC members: 36.9%; in comparison: proportion of ADFC members in the national sample: 6.0%), this data was weighted less in order to avoid any skewing of the results due to these more active cyclists.

The structure of the ADFC Bicycle Travel Analysis used in previous years was largely retained. However, a number of new questions on the coronavirus pandemic were added. Other questions were excluded from the questionnaire in return to make it slightly shorter.

Comparable data from the 2020 Bicycle Travel Analysis (survey period: 2019) is provided in brackets. If a comparison is not possible or meaningful (altered response options, too few respondents), no comparison is made.

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### Cycling in general

- 78% of Germans cycled occasionally to regularly. Of those who cycled, 71% used their bicycle for daily journeys, 58% for cycling day trips and holidays, and 37% for sport purposes. Particularly bicycle usage for sport purposes and day trips increased compared to the previous year.

Figure 1: Do you cycle?  
(Unweighted n=1,134; in %)

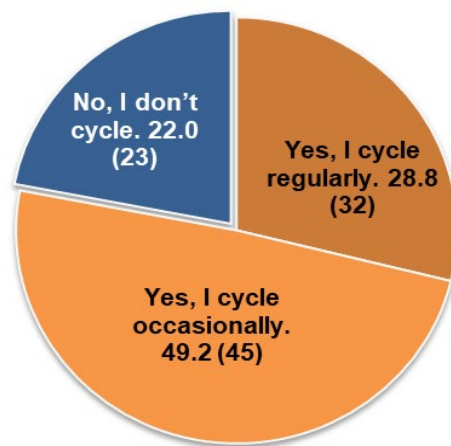
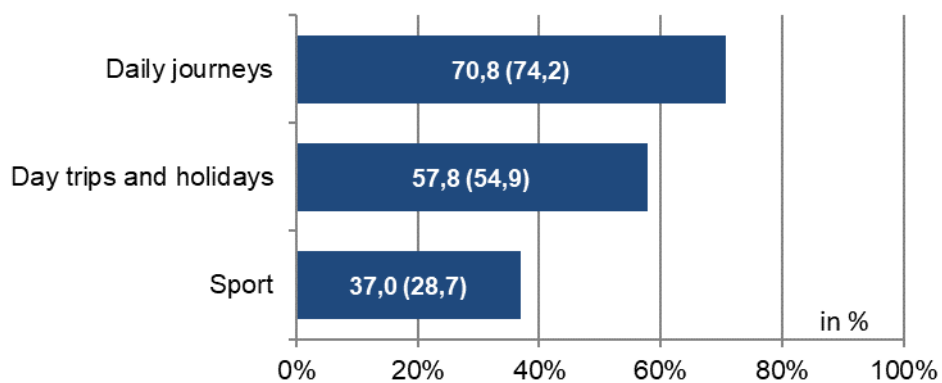


Figure 2: What do you use your bicycle for?  
(Only respondents who cycled; unweighted n=1,881)

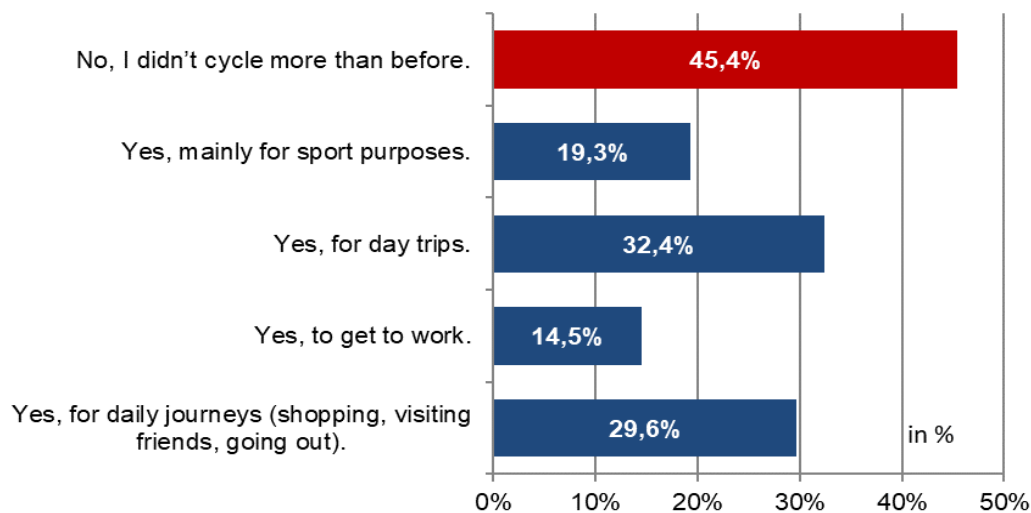


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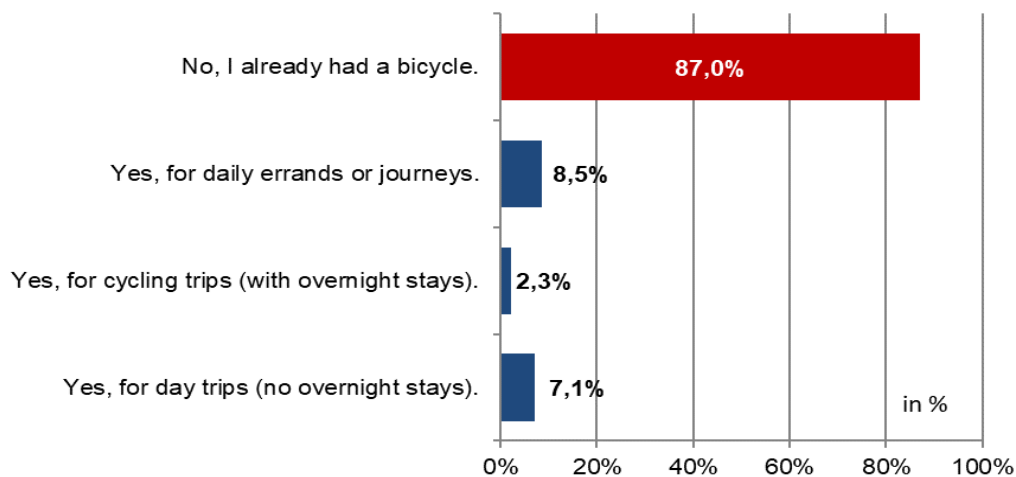
- More than half of the respondents stated that the coronavirus pandemic led them to use their bicycle more often than usual – of these, 32% used it for day trips, 30% for daily journeys, 19% for sport purposes and 15% to travel to work.

Figure 3: Did the coronavirus pandemic lead you to use your bicycle more in 2020 than before the pandemic?  
(Only respondents who cycled; unweighted n=8,946; multiple answers possible)



- **New bicycle purchases:** 13% of respondents bought themselves a new or additional bicycle in 2020.

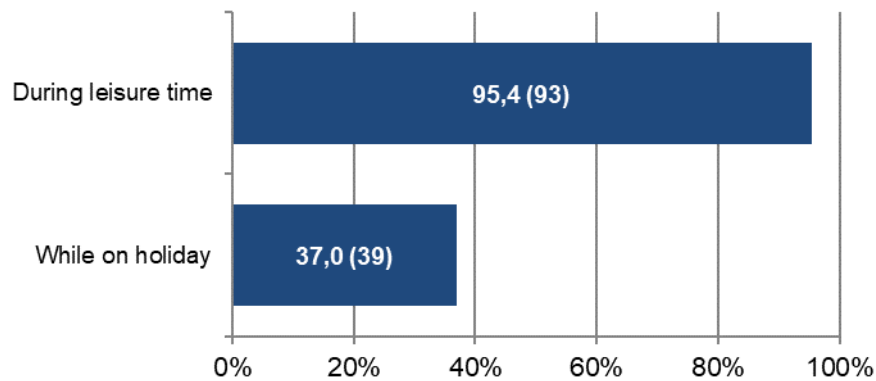
Figure 4: Did the restrictions due to the coronavirus pandemic lead you to buy a new or additional bike in 2020?  
(Only respondents who cycled; unweighted n=1,880)



### Trip behaviour

- **Cycling day trips:** 58% (2019: 64%) of the cycling population went on at least one cycling day trip in 2020. Of these day trips, 95% (2019: 93%) were completed during leisure time and 37% (2019: 39%) while on holiday.

Figure 5: Did you go on the cycling day trips during your leisure time or while on holiday?  
(Only respondents who went on a day trip; unweighted n=7,575)



- In 2020, approx. 31 million people (2019: 34.3 million) went on at least one cycling day trip during their leisure time or while on holiday. This corresponds to about 45% of the German population.
- The average number of cycling day trips completed during leisure time increased year-on-year to 16 (2019: 10).
- In 2020, an average of six day trips were completed while on holiday (2019: 5).
- A total of **464 million cycling day trips were completed during leisure time** (2019: 330 million) departing from home by people, who went on cycling day trips either only during their leisure time or during their leisure time and while on holiday.
- In addition, around **64 million cycling days trip were completed during a holiday** (2019: 62 million).
- The number of cycling day trips thus increased significantly compared to 2019. This is not so much due to an increase in the number of day trippers overall, though, but rather to the fact that those who went on cycling day trips went on significantly more in 2020 than in 2019.
- **Age:** On average, cycling day trippers were 42 years old. Day trips were most popular among the 25–44 age group (40%), followed by the 45–64 age group (30%).
- **Start:** While 65% (2019: 54%) of day trippers departed directly from home, 35% (2019: 46%) started from a different location. If a cycling day trip started from a different location, 67%

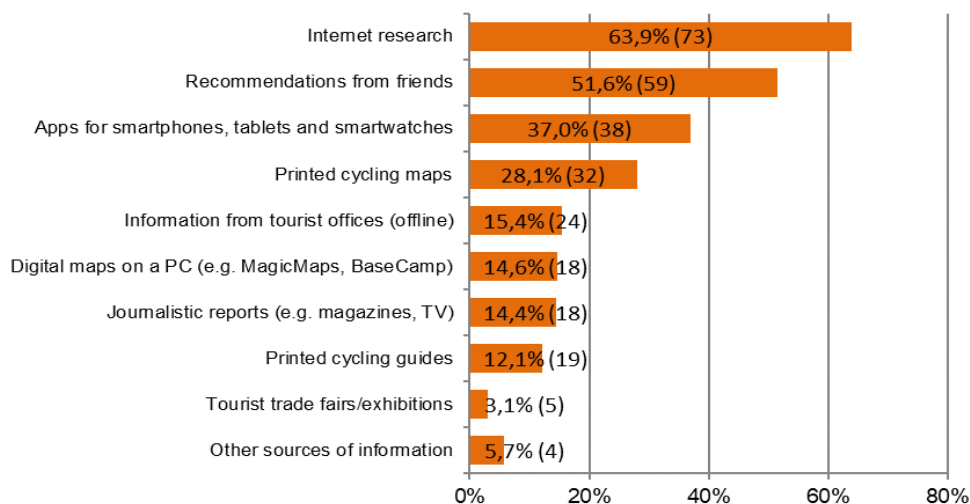
## 2021 ADFC Bicycle Travel Analysis

(2019: 60%) of cyclists travelled to their starting point by car, 22% (2019: 25%) by train and 11% (2019: 16%) by local public transport.

- Approx. 22% of respondents drove more than 60 km and around 9% even more than 100 km to reach their starting point. Most cycling day trips (39%) started within 20–40 km of the cyclist’s place of residence though.
- **Route suggestions:** 86% (2019: 85%) of day trippers travelled routes that they had planned themselves. However, 73% – so slightly less than in the previous year (2019: 79%) – would actually prefer ready-made route suggestions.
- **Day trip destinations:** If day trips were completed while on holiday, then they were mainly within Germany. In terms of the individual regions in Germany visited, the Baltic Sea/Baltic coast was the most popular, followed by the Allgäu, East Frisia, Lake Constance and the North Sea/North Sea coast.
- **Information:** For 64% (2019: 73%) of respondents, the internet was the most popular source of information when planning a day trip. Recommendations from friends ranked second. Apps for mobile devices proved as popular as in the previous year, ranking as the third most popular source of information.

Figure 6: Which information sources do you mainly use to plan your day trips?

(Only respondents who went on day trips, but not cycling holidays; unweighted n=7,566)



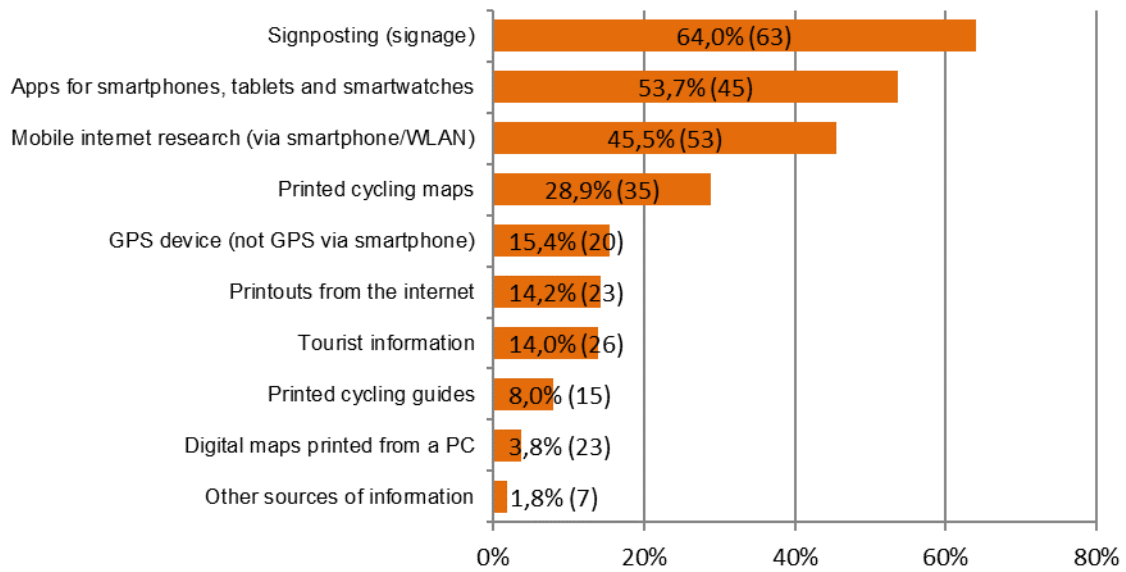
- Signposting was the most popular source of information **when on the go**, being used by 64% (2019: 63%) of respondents. Compared to the previous year, the use of apps for smartphones, tablets and smartwatches became more popular than mobile internet research.



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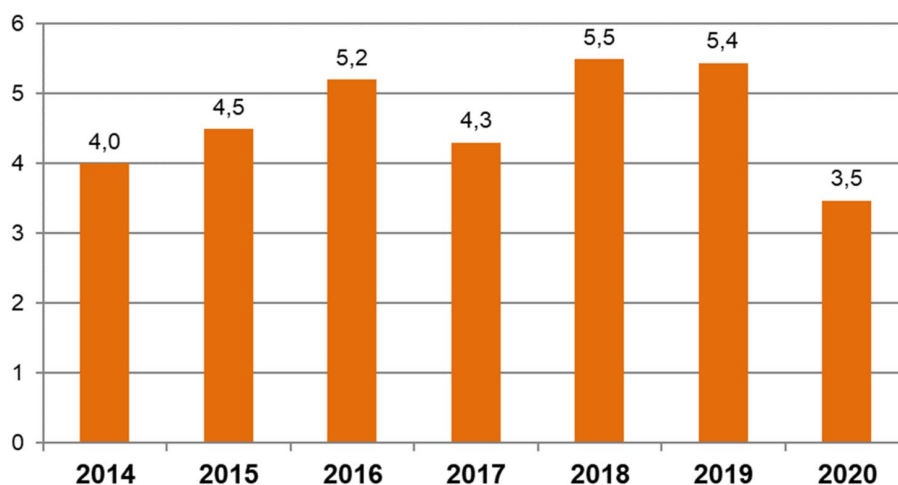
Figure 7: Which information sources and media do you use during cycling day trips, e.g. for orientation?  
(Only respondents who went on day trips, but not cycling holidays; unweighted n=7,560)



### Travel behaviour

- **Cycle tourism volumes:** The proportion of cycle tourists in the total population aged 18+ to go on at least one cycling holiday decreased in 2020 to 5% – so by **3.5 million cycle tourists**. This corresponds to a decrease of approx. 35% compared to the previous year (2019: 8% of the total population or 5.4 million cyclists). It is worth noting, however, that 54% of those who did go on a cycling holiday in 2020 did so for the first time.

Figure 8: Number of cycle tourists (millions)

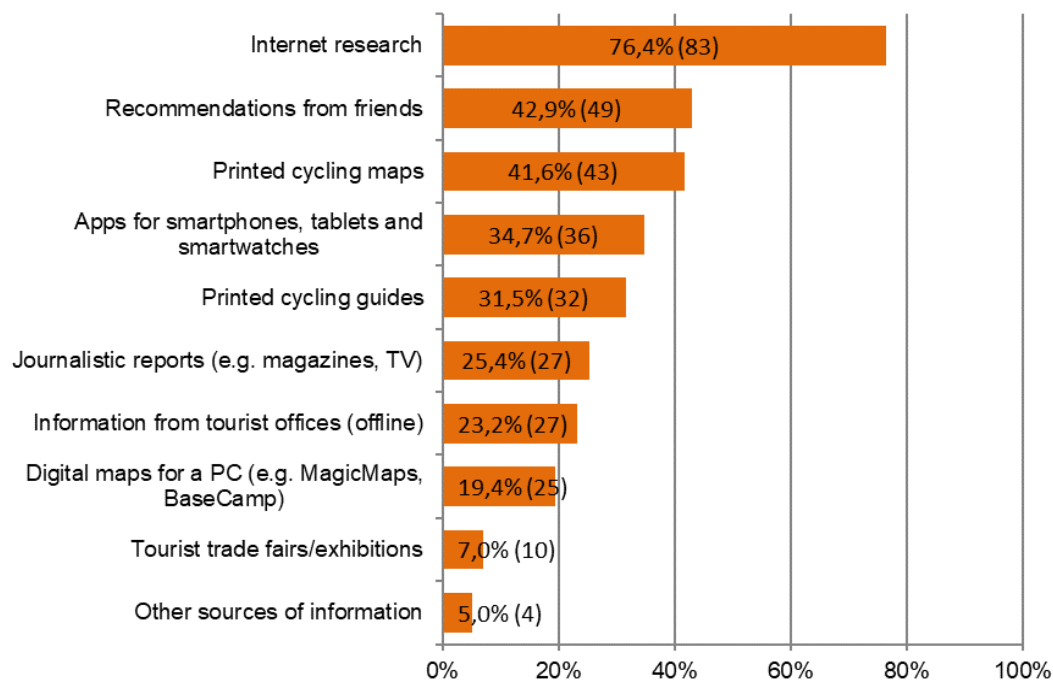


- **Short cycling trips:** In 2020, **4.4 million people** went on a short cycling trip involving max. 2 overnight stays.
- **Age:** On average, cycle tourists were 55 years old (2019: 53). Cycle tourism was most popular among the 65+ age group (38%; 2019: 22%), followed by the 45–64 age group (2020: 35%; 2019: 50%), 25–44 (2020: 21%; 2019: 28%) and the 15–24 age group (2020: 6%; 2019: 4%). An increase in popularity can thus above all be seen in the 65+ age group.
- **Trip planning:** Cycling trips were generally planned at relatively short notice. More than half of cycle tourists only decided on their destination around two months prior to their departure and 29% just one month to one week prior to their departure. The decision to go on a cycling holiday was therefore far more spontaneous in 2020 than in 2019.
- **Trip duration:** On average, a cycling holiday lasted approx. 6 nights (2019: 7) and was thus only slightly shorter than in 2019. Most cycling holidays were shorter trips lasting up to seven nights (76%; 2019: 73%). About one third of cycling holidays were short trips only lasting up to three nights.
- **Travel period:** In 2020, cyclists tended to go on their cycling holiday later than in previous years: instead of June and July, most cycling holidays took place in July and August. Almost half of all cycling holidays in 2020 were in July (22%) and August (25%).

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- **Sources of information:** When it came to **organising a cycling trip**, the internet remained the most popular source of information for 76% of respondents (2019: 83%), followed by personal recommendations for 43% (2019: 49%) and printed maps for 42% (2019: 43%). Apps for mobile devices remained as popular as in the previous year (35%; 2019: 36%).

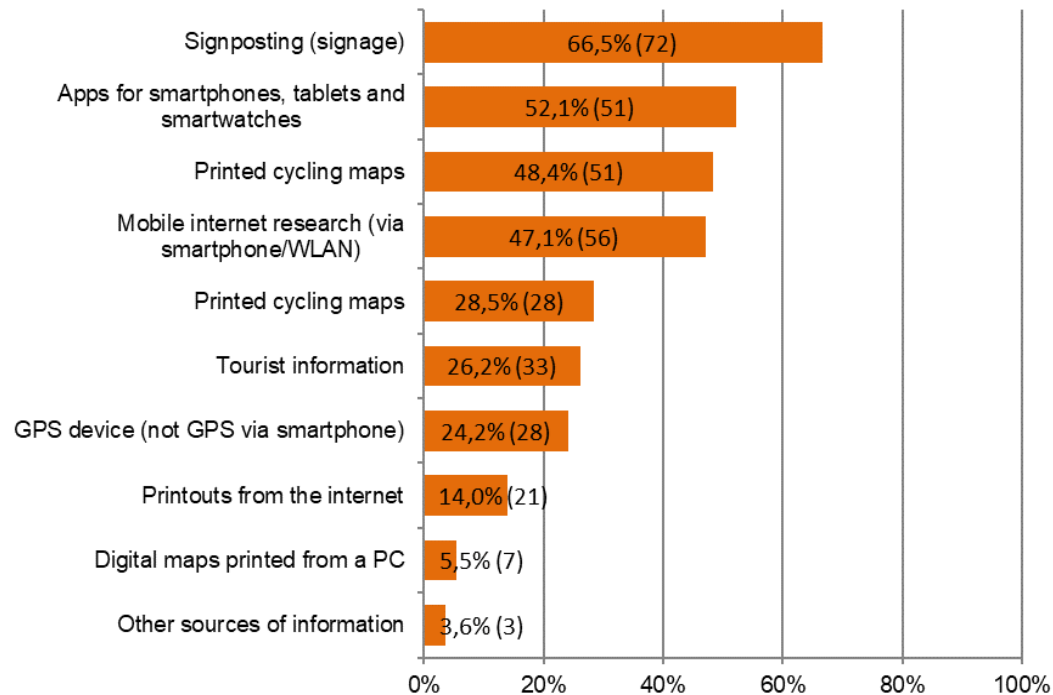
Figure 9: Which information sources did you mainly use to plan your cycling holidays?  
(Cycle tourists only; n= 4,986)



- **During their cycling trip**, 67% (2019: 72%) of respondents used local signposting as a source of information, followed by apps (52%; 2019: 51%), printed cycling maps (49%; 2019: 51%) and mobile internet research (47%; 2019: 56%).
- The **most popular apps** to use during cycling holidays were komoot (63%; 2019: 44%) and Google Maps (59%; 2019: 32%).

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Figure 10: Which information sources and media did you use during cycling trips, e.g. for orientation?  
(Cycle tourists only; n= 4,983)



- Cycling holiday as the main holiday:** Compared to the previous year, a cycling trip was the main holiday of the year for 51% (2019: 35%) of respondents. 40% stated that this year's cycling trip replaced a planned trip that had had to be postponed or cancelled. When the cycling holiday was the main holiday, it involved an average of 7 overnight stays, and when it was an additional holiday, it involved 5 overnight stays.
- Trip organisation:** Cycle tourists mainly organised their cycling holiday for themselves (90%; 2019: 86%). 10% (2019: 14%) went on a package holiday, most of which were all-inclusive trips.
- Type of cycling holidays:** While 35% (2019: 29%) of cycle tourists had a fixed based in a region during their cycling holiday ("circular tours"), 65% (2019: 72%) travelled along a cycle route and stayed at different accommodation along the way ("point-to-point tours").
- Travel companion:** Cycle tourists were mainly accompanied by their partner (54%; 2019: 53%) or friends (27%; 2019: 30%). 21% (2019: 20%) travelled alone. 16% (2019: 17%) of cycling holidays were completed in a small group of 3–5 people. 4% (2019: 6%) went on a cycling holiday with children under the age of 14.
- Type of bicycle:** Most cycle tourists used a touring or trekking bike (64%; 2019: 67%). 15% (2019: 18%) used a mountain bike, around 11% (2019: 9%) an urban/city bike and 5% (2019: 6%) a racing bike. Overall, 32% (2019: 29%) of cycle tourists used an e-bike. The proportion of rental bikes lay at 5% (2019: 7%).

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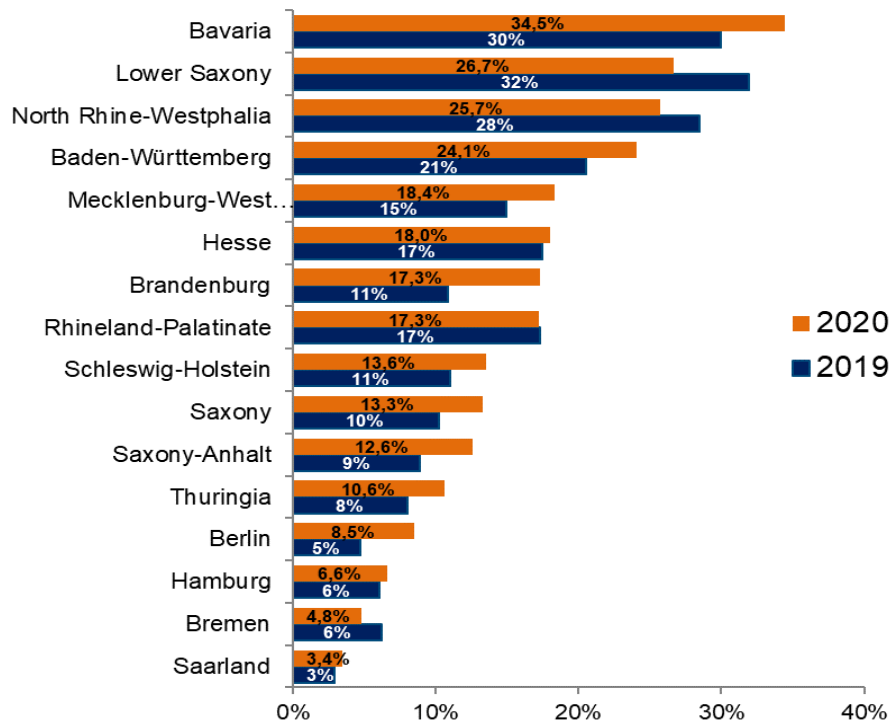
- **Travel:** The most popular means of transport for travel to/from the cycling holiday starting point/destination were car (40%; 2019: 39%) and train (31%; 2019: 34%). While the popularity of cars for travel to/from the starting point/destination remained roughly the same as in the previous year, travel by bike proved more popular (23%/20%; 2019: 15%/18%).
- **Quality of offers:** The quality of the German regions and long-distance cycle routes was assessed as positive overall. Particularly the quality of the accommodation met the expectations of the cycle tourism target group. As in the previous year, aspects for which the assessment was less positive included the cycle route surface and signposting as well as the arrival/departure by public transport. In many cases, the latter was not possible without problems. The main criticisms were a lack of space aboard vehicles and inconvenient bicycle storage on trains. With regard to the coronavirus pandemic, just 13% of respondents complained of insufficient compliance with protective measures and hygiene precautions.
- **Satisfaction:** In 2020, cycle tourists explored countless different cycle routes in Germany and abroad. Overall, they were very satisfied with their cycling tours and trips: around 82% (2019: 84%) would recommend their destination or route without any reservations.
- **Destination:** Taking all cycle tourists into account, the vast majority (88%; 2019: 81%) went on a cycling holiday within Germany. Just 21% (2019: 33%), so one in five cycle tourists, ventured abroad.
- In terms of the reasons for going on a cycling holiday within Germany, 74% of the respondents stated that they generally liked to travel within Germany. A shorter distance to their cycling destination or the coronavirus pandemic played a role in their decision to remain in Germany in 2020 for 48% respectively.

The most popular travel destinations are presented below, with the most popular ones represented in the graphs.

## 2021 ADFC Bicycle Travel Analysis

### Most popular German federal states for cycling in 2020

Figure 11: Now consider all of the multi-day cycling trips you went on in 2020. Which German federal states did you cycle in? (Cyclists who went on a cycling holiday within Germany; n=3,563)

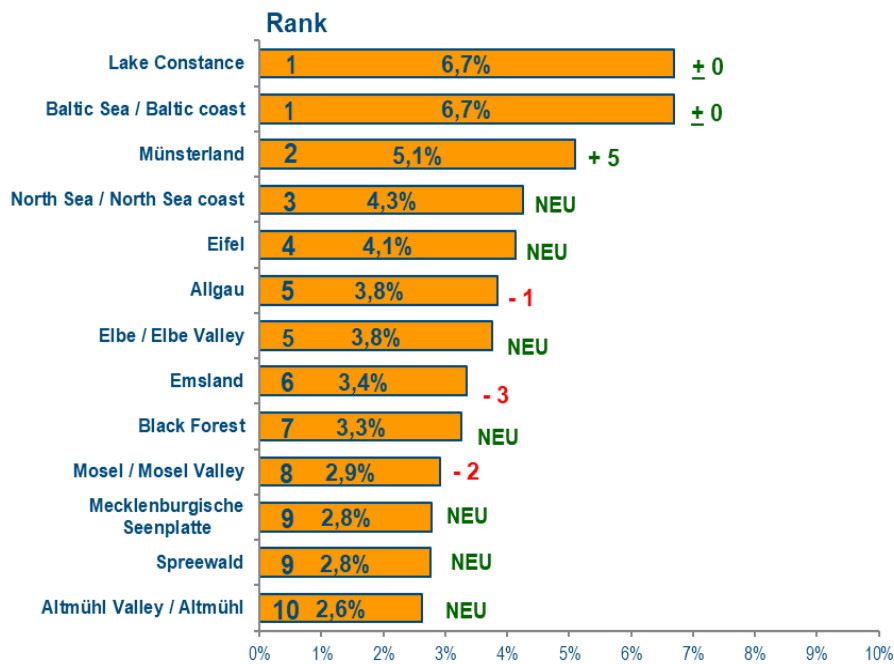


### Most popular cycling regions in Germany in 2020

When asked which regions they visited, the main regions mentioned by respondents were Lake Constance, the Baltic Sea / Baltic coast as well as Münsterland, the North Sea / North Sea coast and the Eifel. 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 went on in 2020. Which cycling region(s) did you visit during your cycling trips in 2020? (Cycle tourists: n=967)

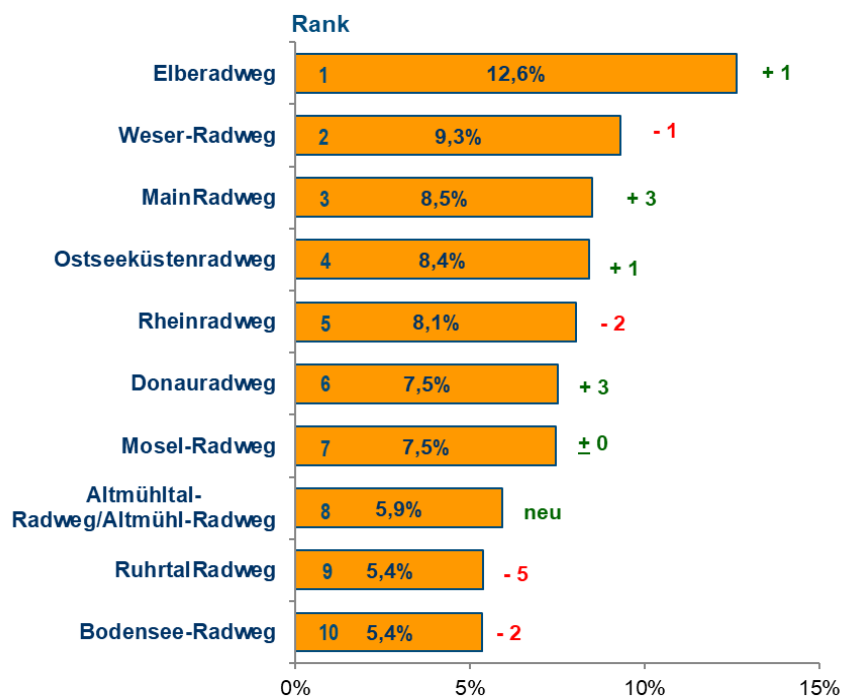
## 2021 ADFC Bicycle Travel Analysis



### Routes cycled in Germany in 2020

In terms of the cycle routes explored within Germany, the Elberadweg regained the lead in 2020. It was followed by the Weser-Radweg, MainRadweg, Ostseeküstenradweg and Rheinradweg.

Figure 13: Which long-distance cycle routes did you explore during your multi-day cycling trips in 2020? (Cyclists who went on a cycling holiday within Germany; n=3,199)



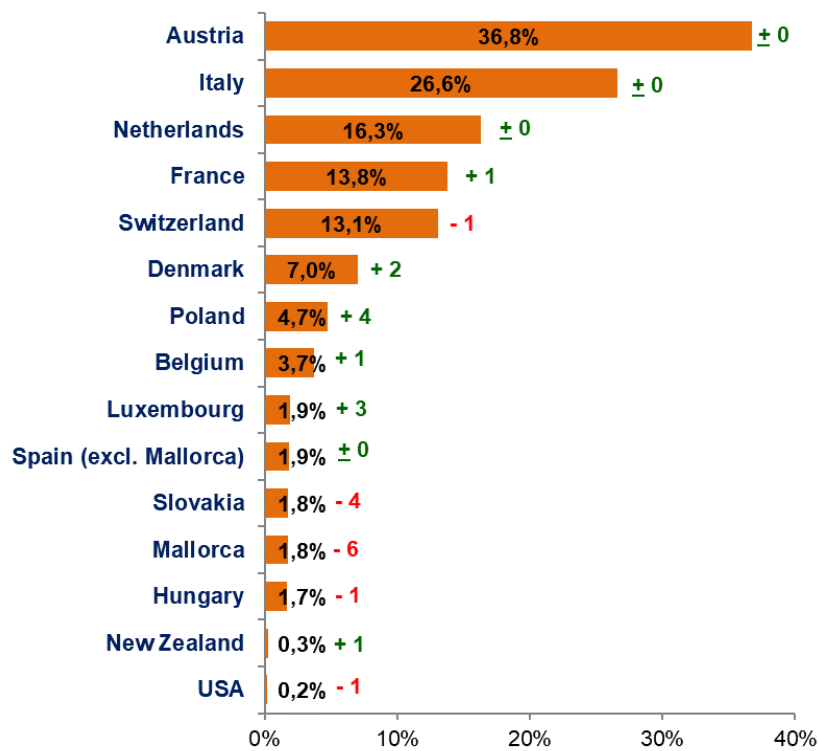
## 2021 ADFC Bicycle Travel Analysis

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### Foreign countries visited in 2020

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

Figure 14: And in which countries outside of Germany did you explore during your multi-day cycling trips in 2020?  
(Cyclists who went on a cycling holiday within Germany; n=908)



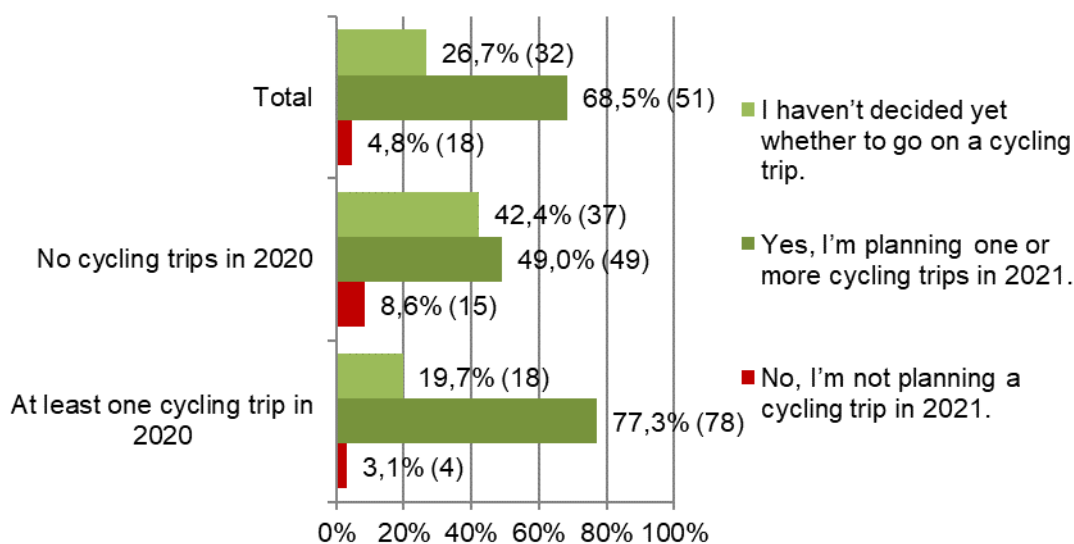


## 2021 ADFC Bicycle Travel Analysis

### Outlook for 2021

- Potential:** 77% (2019: 78%) of cycle tourists, who completed a cycling holiday in 2020, want to do so again in 2021. As many as 49% of those who did not go on a cycling holiday in 2020 plan to do so in 2021. This figure remains unchanged compared to 2020. However, if the overall figures are considered, 69% of respondents – so 18% more than in the previous year – want to go on a cycling trip in 2021.

Figure 15: Cycling holiday planning  
(All cycle tourists (target group); n=4.955)



- Planning for 2021:** Approx. 79% of respondents are planning a cycling trip within Germany in 2021. So the destination that is already the most popular among cycle tourists was able to gain in popularity by a further 7% compared to the previous year (2019: 72%). Approx. 24% of respondents were interested in other European countries as potential travel destinations (2019: 40%). This is a massive 16% fewer cyclists than prior to the coronavirus pandemic! With around just 1%, destinations outside of Europe and overseas play only a negligible role. 10% of respondents still haven't decided yet where they want to go in 2021 (2019: 8%).

# 2021 ADFC Bicycle Travel Analysis

## The ADFC and cycle tourism

### Deutschland per Rad entdecken

With its 'Deutschland per Rad entdecken' magazine, the ADFC provides inspiration for future cycling trips and promotes cycle tourism within Germany. The thirteenth edition was published in January 2021 and presents 36 long-distance cycle routes, six Bicycle Travel Regions and four federal states. More information: [www.deutschland-per-rad.de](http://www.deutschland-per-rad.de)



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](http://www.germany.travel/radfahren) and enjoys a long-standing cooperation with the ADFC.

4 routes with		<h3>ADFC Quality Routes and ADFC Bicycle Travel Regions</h3> <p>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 will be honoured during an online event on 15 April 2021: <i>(* Re-certified)</i></p> <p>3 stars: Paderborner Land Route*, Südschwarzwald-Radweg*, Heidelberg-Schwarzwald-Bodensee-Radweg*, Wasserburgenroute*, Töddenland-Radweg*, Rheinische Apfelroute</p> <p>4 stars: Weser-Radweg*, Saar-Radweg*, Glan-Blies-Radweg*, DonauTÄLER-Radweg*, Radrunde Allgäu*, Eder-Radweg*, Neckartal-Radweg*, Saarland-Radweg*, Kocher-Jagst-Radweg*, Diemelradweg*, Bodensee Radweg*</p> <p>Regions: HeideRegion Uelzen and Wesermarsch. The Inn-Salzach region was named a new ADFC Bicycle Travel Region in 2020.</p>
23 routes with		
12 routes with		
7 certified regions		
There are currently		
39 ADFC Quality Routes and		
7 ADFC Bicycle Travel Regions		
covering approx. 13,000 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 cycling holiday operators' varied package deals for 2021 on [www.radurlaub-online.de](http://www.radurlaub-online.de).