2021 ADFC Bicycle Travel Analysis

22nd national survey on the bicycle travel market

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Deutschland per Rad entdecken 2021/22

The calling card for German cycle tourism – for more than 20 years!

www.deutschland-per-rad.de
2021 ADFC Bicycle Travel Analysis

A huge thanks to our partners!
Methodology: representative online survey

2 national online panels

Panel 1

Panel 2

Public survey via ADFC channels

Cycle tourists with ≥ 3 overnight stays + questions on day trips

Total population:
cycling in general/short trips/cycling holidays/day trips by bike
Non-cycle tourists

Evaluation: 10,692 respondents
Weighting of results
No skewing of results caused by cycling enthusiasts (ADFC members)
Representative results

Respondents aged 18+

ADFC-Radreiseanalyse 2021
Cycle tourism target groups

Day trippers

What impact has the coronavirus pandemic had on cycle tourism?

Cycle tourists
Point-to-point cyclists
Regional cyclists

Min. 3 nights

Day trips
Pandemic led to increased bicycle usage

78% of Germans cycled occasionally to regularly.

55% used their bike more often due to the pandemic

- 32% for trips
- 30% for daily journeys
- 19% for sport
- 15% to travel to work

13% bought a new bike
Focus on day trippers

Day trippers

What impact has the coronavirus pandemic had on cycle tourism?

Day trips

Cycle tourists

Point-to-point cyclists
Regional cyclists

Min. 3 nights
Cycling trend: 41% more cycling trips during leisure time

58% of Germans completed at least one cycling trip in 2020

11% for the first time

464 mil. (+ 41%) during leisure time

64 mil. (+ 2%) while on holiday

Ø 16 trips during leisure time (2019: 9)
Day trippers: young and family-oriented

- 65% started their trip from home (+11%)
- 25% families with children
- Ø 42 years old

Travel to starting point
- 80% drove up to 60 km to starting point
- 33% use an e-bike
- 67%
Which way? Well informed while on the go!

73% want tour suggestions

Apps increasingly popular on the go
54% (+ 9%)

60% Google (+ 19%)
58% komoot (+ 24%)
10% DMO apps (+ 8%)

Make tour suggestions more appealing
Focus on cycle tourists

What impact has the coronavirus pandemic had on cycle tourism?

Day trippers

Cycle tourists
Point-to-point cyclists
Regional cyclists

Min. 3 nights
The coronavirus pandemic also affected cycle tourism

**CYCLE TOURISM MARKET VOLUME**

- **1999**: 1,92 mil.
- **2014**: 4 mil.
- **2015**: 5,2 mil.
- **2016**: 4,3 mil.
- **2017**: 5,5 mil.
- **2018**: 5,4 mil.
- **2019**: 3,5 mil.
- **2020**: 4,4 mil.

Short breaks (max. 2 nights)
Cycle tourism: ideal for holidays during the pandemic

- **54%** went on a cycling holiday for the first time!
- **18%** went on a cycling holiday to make up for a postponed trip
- **22%** went on a cycling holiday as an alternative to a cancelled trip
Cycle tourism: how did the pandemic affect behaviour?

For **51%**, the cycling trip was the **main holiday**

**Main travel season**
July /August

**Travel decision**
50% max. 1 month prior to departure

**Destination**
Due to the pandemic, 48% remained in Germany
Cycle tourists: experienced independent travellers

- Ø 55 years old
- 54% travel with their partner
- 32% use an e-bike
- 39% male
- 61% organised cycling trip themselves
- Trip duration: Ø 6 nights
E-bike trend continues

31% of day trippers use an e-bike

Proportion of cycle tourists using an e-bike:
- 2017: 18%
- 2018: 23%
- 2019: 29%
- 2020: 32%
Analogue experience – digital information

**Before the cycling trip**
- Internet: 76% (83%)
- Recommendations: 43% (49%)
- Cycling maps: 42% (43%)
- Apps: 35% (36%)
- Tourist info: 23% (27%)

**During the cycling trip**
- Apps: 52% (51%)
- Cycling maps: 48% (51%)
- Tourist info: 26% (33%)

*SIGNPOSTING* 67% (72%)

(x) = previous year
Half of cyclists use apps on the go – the clear favourites

- Komoot: 63% (+19%)
- Google: 59% (+27%)
- Regional app: 14%
- Outdooractive: 12% (+2%)
- Public transport apps: 10%
Point-to-point cyclists (65%)
Stay at different locations along their cycle route

Regional cyclists (35%)
Explore a region during circular tours from a fixed base

Average kilometres per day

- **Point-to-point cyclists**: 70 km
  - Cycle Ø 7 stages
  - 67% hotel
  - 48% guest house (+7%)
  - 22% campsite (+5%)
  - 12% holiday apartment
  - 10% with relatives/acquaintances (+4%)

- **Regional cyclists**: 57 km
  - Cycle Ø 6 days
  - 42% hotel (-6%)
  - 33% holiday apartment (+7%)
  - 16% guest house
  - 10% campsite
  - 8% with relatives/acquaintances (+4%)

Accommodation choices

Hygiene measures at the accommodation were particularly important for 26% of cycle tourists.

(x) = comparison with 2020
Cycle tourists travel more sustainably

39% arrival (+/-0)  40% departure (+/-0)

34% arrival (-2%)  31% departure (-4%)

20% arrival (+2%)  23% departure (+8%)
Cycling in Germany – by choice?

88% of cycle tourists went on trips within Germany in 2020

Reasons for trips within Germany:

- 74% like to travel within Germany
- 48% because of the short journey
- 48% because of the pandemic
- 41% because of the good infrastructure
- 33% feel safe in Germany
- 31% appreciate the cycle tourism offers
Top routes and regions: most popular cycling destinations

- **265 long-distance cycle routes** covering 76,000 km
- **350 regional routes** covering 30,000 km
### Top 10: most popular cycle routes in Germany

<table>
<thead>
<tr>
<th>Route</th>
<th>Rank</th>
<th>Figures in %</th>
<th>Change</th>
</tr>
</thead>
<tbody>
<tr>
<td>Elberadweg</td>
<td>1</td>
<td>8.1</td>
<td>+1</td>
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<tr>
<td>Weser-Radweg</td>
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<td>6.2</td>
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<td>Ostseeküsten-Radweg</td>
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<td>MainRadweg</td>
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<tr>
<td>Rheinradweg</td>
<td>10</td>
<td>2.6</td>
<td>NEU</td>
</tr>
</tbody>
</table>

*Figures in % compared to the previous year.*

The most popular routes from a total of 151

River cycle routes were popular classics

Elberadweg reclaims #1 position
Top 5: most popular federal states in Germany

- Bavaria: 25.0% (+0)
- Mecklenburg-West Pomerania: 11.8% (+3)
- Lower Saxony: 10.1% (-1)
- North Rhine-Westphalia: 9.7% (-1)
- Baden-Württemberg: 9.1% (-1)

Figures in % | Compared to the previous year
### Top 10: most popular cycling regions in Germany

#### The top performers among the 126 regions

<table>
<thead>
<tr>
<th>Region</th>
<th>Rank</th>
<th>Change</th>
<th>Compared to Previous Year</th>
</tr>
</thead>
<tbody>
<tr>
<td>Ostholstein</td>
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<tr>
<td>Lake Constance</td>
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<td>4.3</td>
<td>+5</td>
</tr>
<tr>
<td>Münsterland</td>
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<td>±0</td>
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<tr>
<td>Aller-Leine Valley</td>
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<td>Emsland</td>
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<td>Altmark</td>
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<td>2.5</td>
<td>NEU</td>
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<tr>
<td>Mittenwald (Upper Bavaria)</td>
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<td>NEU</td>
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<tr>
<td>Northern Black Forest</td>
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<td>NEU</td>
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<tr>
<td>Weser Uplands</td>
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<td>1.9</td>
<td>−5</td>
</tr>
<tr>
<td>Elbe (Elbe Valley)</td>
<td>10</td>
<td>1.8</td>
<td>−2</td>
</tr>
</tbody>
</table>

Figures in % | Compared to previous year

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**Osthohstein is the new leader**

**Trend towards quieter routes**

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Top 5: most popular destinations abroad

Netherlands 1 13.6 ±0
Austria 2 12.2 ±0
Italy 3 9.1 ±0
France 4 6.7 ±0
Spain 5 3.6 ±0

Figures in % | Compared to the previous year
Future outlooks
Prospects: between hope and uncertainty

69% of cycle tourists are planning a cycling holiday in 2021

The coronavirus pandemic continues to affect our lives in 2021.

77% of those who went on a cycling holiday in 2020 are also planning a trip in 2021.

49% of those who did not go on a cycling holiday in 2020 are planning a trip in 2021.
Challenges: DMOs providing stimulus

- Intelligent infrastructure
- Suggestions of tours off the beaten track
- Top performers
- Digital information offers
- Themed routes
- Target group marketing
- Hygiene concepts
- Visitor management
- Newcomer commitment

Image: April-Agentur
12 premium routes: central axes with high-quality infrastructure

€45 million to expand and extend the German cycling network
Potential for synergies between cycle tourism and everyday cycling

33% of cycle tourists use their bike more in their daily lives (-7%)

59% also use leisure routes for their daily journeys (+5%)

#MEHRPLATZFÜRSRAD
Seize the opportunities! €900 million for cycling
Thank you for your attention!

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