

2021 ADFC Bicycle Travel Analysis

22nd national survey on the bicycle travel market

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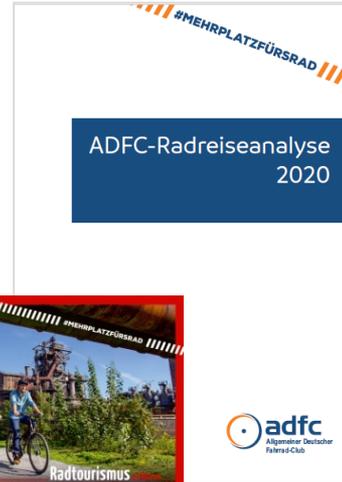


About the ADFC

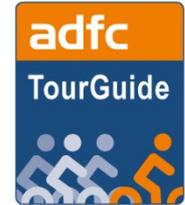
Cycling policy and interest representation



Focus areas



Services



Deutschland per Rad entdecken 2021/22

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Deutschland per Rad entdecken
Zeit nehmen und genießen
Auf einer Radreise zählen nicht die Kilometer, sondern die Erfahrungen. Der Wegesind lädt ein zum Rasten und Erleben. Nehmen Sie sich die Zeit. ... mehr!

Deutschland auf umweltfreundliche und erholsame Art entdecken

Das Erfolgsmagazin
"Deutschland per Rad entdecken"

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

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DEUTSCHLAND PER RAD ENTDECKEN

36 RADFERNWEGE
6 RADREGIONEN
4 BUNDES-LÄNDER

- ALPEN-SPEZIAL
RADREISEN MIT
GIPFELPANORAMA
- RADREGIONEN
VIELFALT FÜR DIE
GANZE FAMILIE
- FLUSSRADWEGE
ZUM EINSTEIGEN
UND GENIEßEN

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ADFC-Radreiseanalyse 2021

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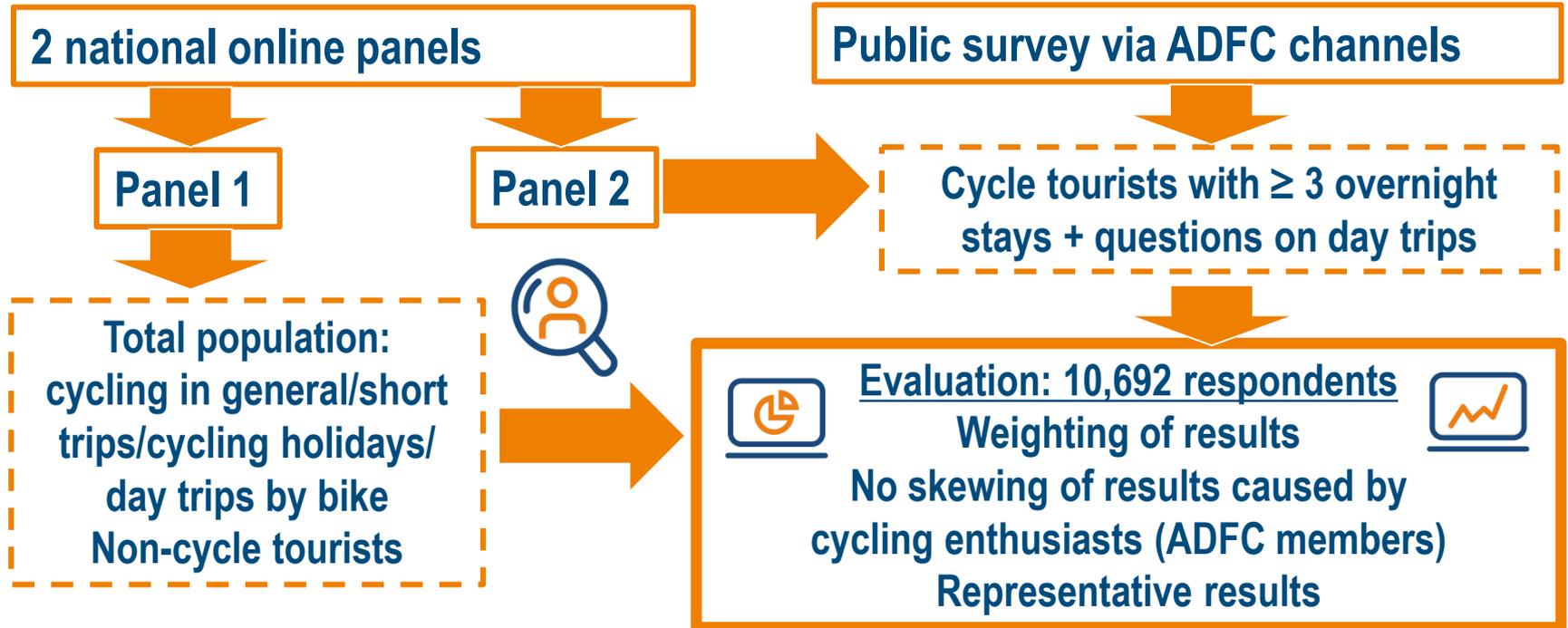
2021 ADFC Bicycle Travel Analysis

A huge thanks to our partners!

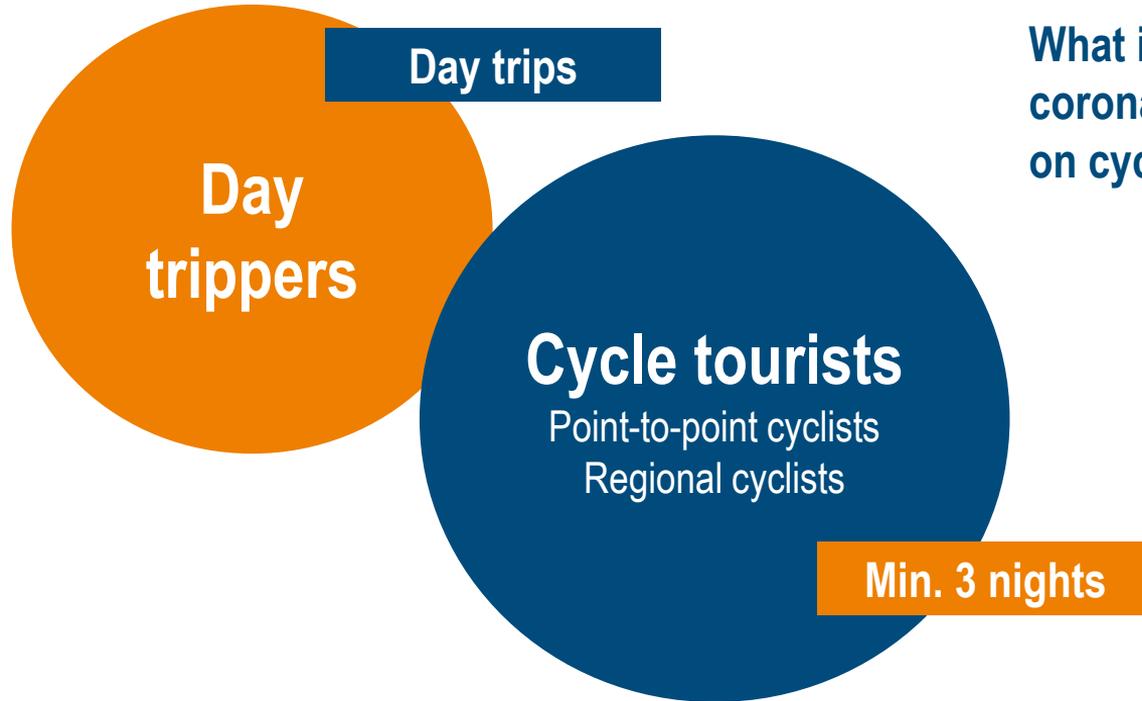
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Methodology: representative online survey



Cycle tourism target groups



What impact has the coronavirus pandemic had on cycle tourism?



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

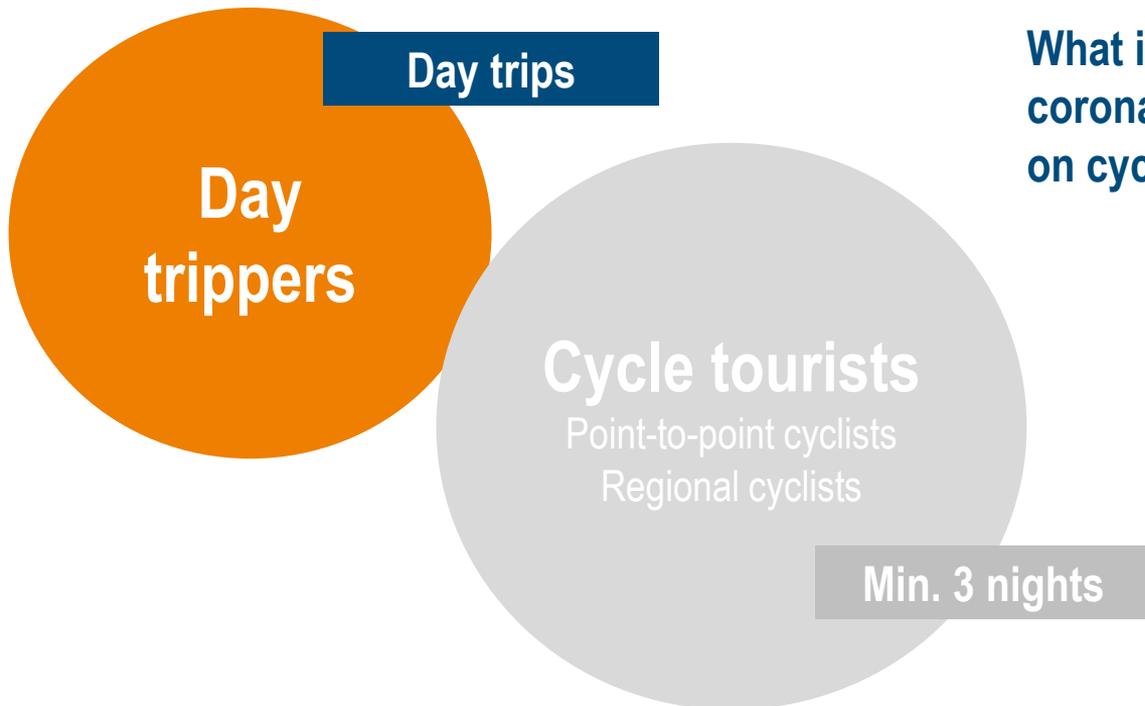
19% for sport

15% to travel to work

13% bought a new bike



Focus on day trippers



What impact has the coronavirus pandemic had on cycle tourism?



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

Ø 42 years old

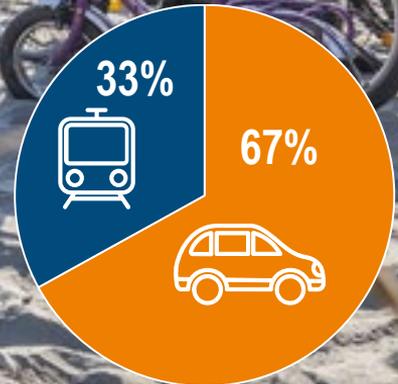
25% families with children

65% started their trip from home (+11%)

80% drove up to 60 km to starting point

31% use an e-bike

Travel to starting point



Which way? Well informed while on the go!

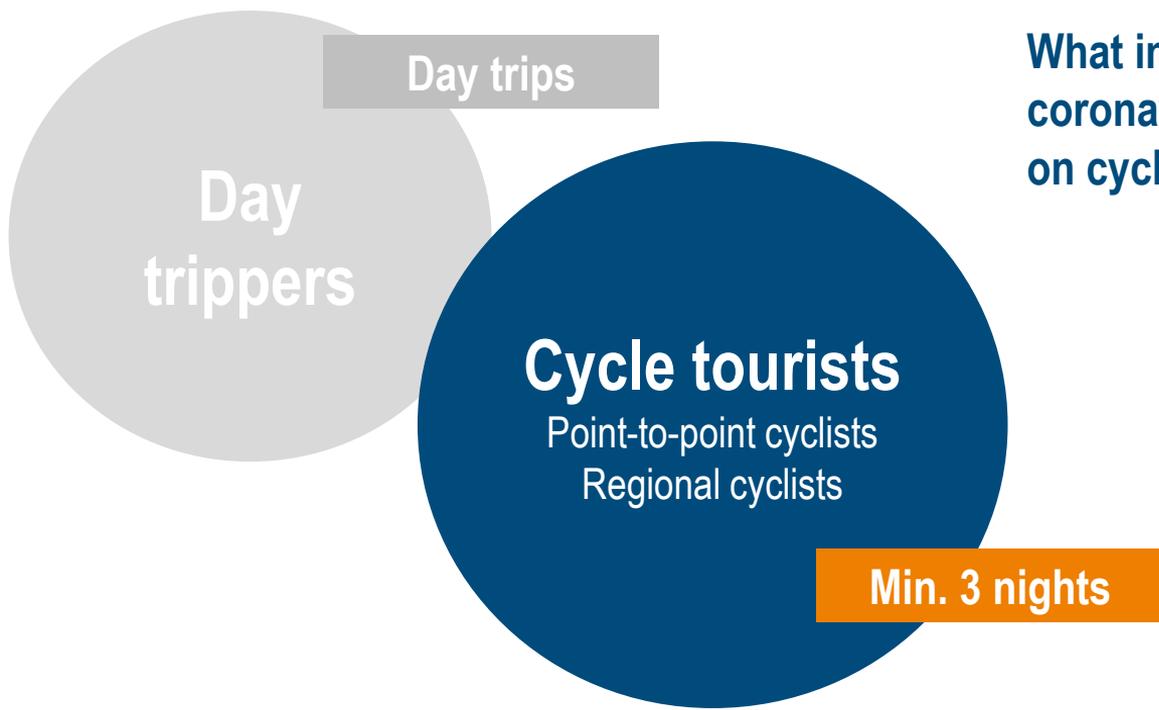
73% want
tour suggestions

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

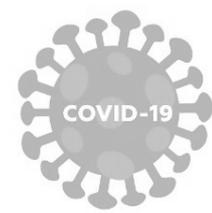
60% Google (+ 19%)
58% komoot (+ 24%)
10% DMO apps (+ 8%)

Make tour suggestions
more appealing

Focus on cycle tourists



What impact has the coronavirus pandemic had on cycle tourism?



The coronavirus pandemic also affected cycle tourism

CYCLE TOURISM MARKET VOLUME



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

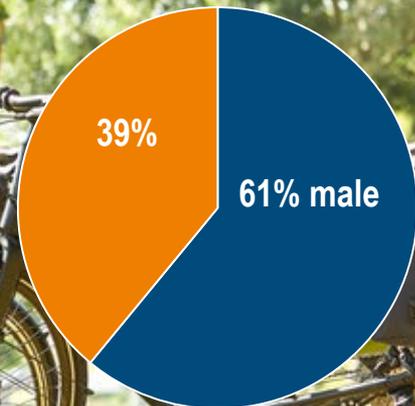


Cycle tourists: experienced independent travellers

Ø 55 years old

54% travel with their partner

32% use an e-bike



90% organised cycling trip themselves

Trip duration:
Ø 6 nights

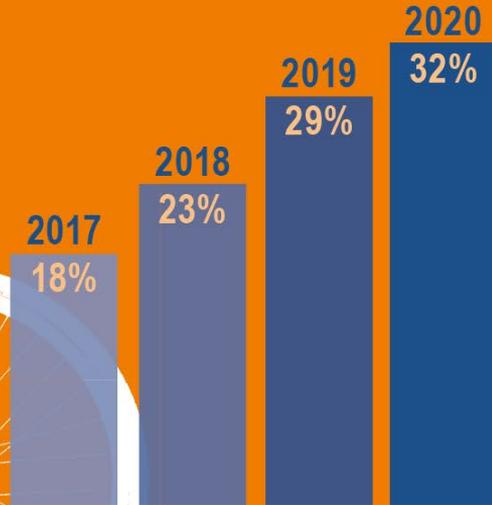
E-bike trend continues

E-BIKE TREND

31% of day trippers
use an e-bike

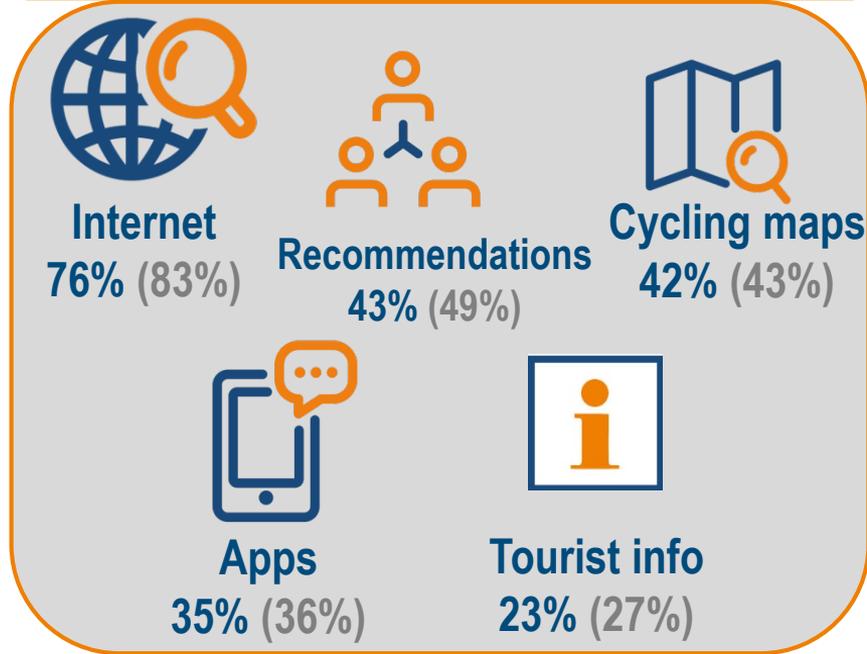


Proportion of cycle tourists using an e-bike

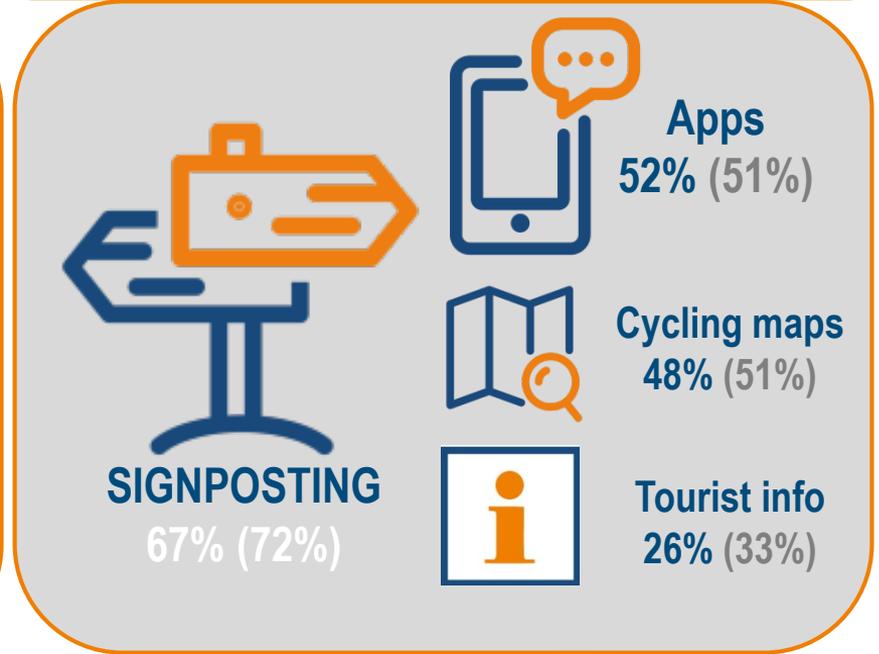


Analogue experience – digital information

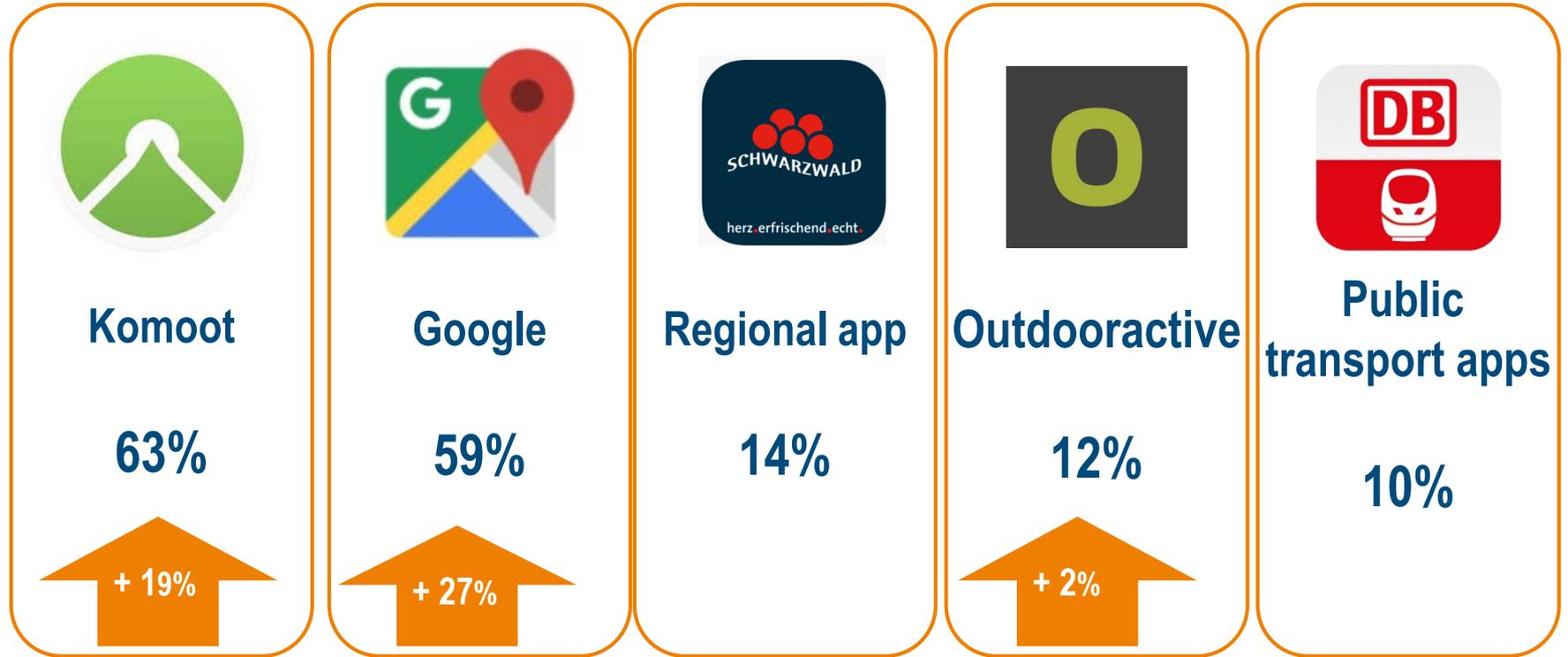
Before the cycling trip



During the cycling trip



Half of cyclists use apps on the go – the clear favourites



Point-to-point cyclists (65%)

Stay at different locations along their cycle route

CYCLE TOURISTS

Regional cyclists (35%)

Explore a region during circular tours
from a fixed base



Average kilometres per day

→ 70 km

Cycle \emptyset 7 stages



Average kilometres per day



57 km

Cycle their bike on \emptyset 6 days

67% hotel

48% guest house (+7%)

22% campsite (+5%)

12% holiday apartment

10% with relatives/acquaintances (+4%)

Accommodation choices



42% hotel (-6%)

33% holiday apartment (+7%)

16% guest house

10% campsite

8% with relatives/acquaintances (+4%)

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

Cycle tourists travel more sustainably



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

The most popular routes from a total of 151



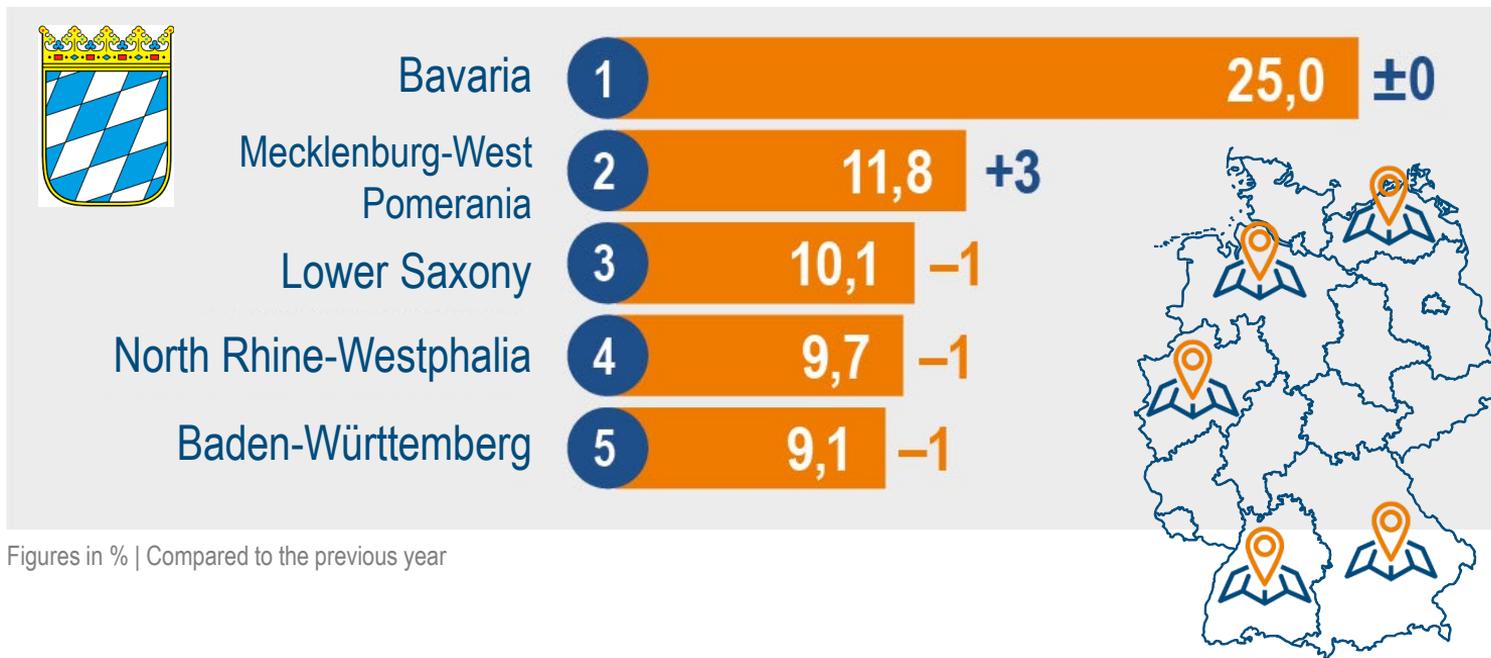
Figures in % | Compared to the previous year

River cycle routes were popular classics

Elberadweg reclaims #1 position



Top 5: most popular federal states in Germany



Top 10: most popular cycling regions in Germany

The top performers among the 126 regions

Ostholstein	1	4,7	NEU
Lake Constance	2	4,3	+5
Münsterland	3	4,2	±0
Aller-Leine Valley	4	3,4	NEU
Emsland	5	2,8	-3
Altmark	6	2,5	NEU
Mittenwald (Upper Bavaria)	7	2,4	NEU
Northern Black Forest	8	2,3	NEU
Weser Uplands	9	1,9	-5
Elbe (Elbe Valley)	10	1,8	-2

Trend towards quieter routes

Ostholstein is the new leader

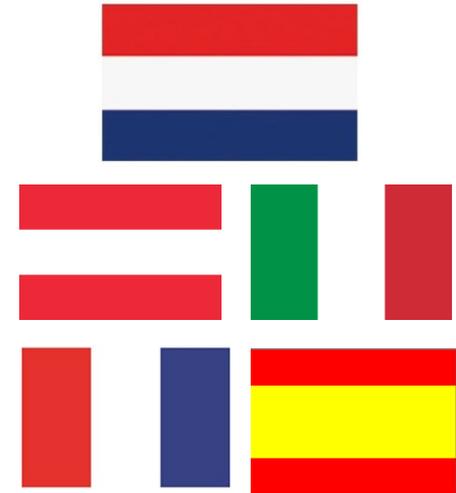


Figures in % | Compared to the previous year

Top 5: most popular destinations abroad



Figures in % | Compared to the previous year



A glass sphere, likely a lens or a decorative object, is the central focus. It is positioned on a grassy surface, and its surface is highly reflective. The reflection inside the sphere shows a vibrant, green landscape. In the foreground of the reflection, there are tall, thin grasses. In the middle ground, there are several trees with dense green foliage. In the background of the reflection, a small house with a brown roof is visible. The sky in the reflection is bright blue with some white clouds. The background of the entire image is a soft, out-of-focus green, suggesting a grassy field or a garden. The overall mood is peaceful and natural.

Future outlooks

Prospects: between hope and uncertainty

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

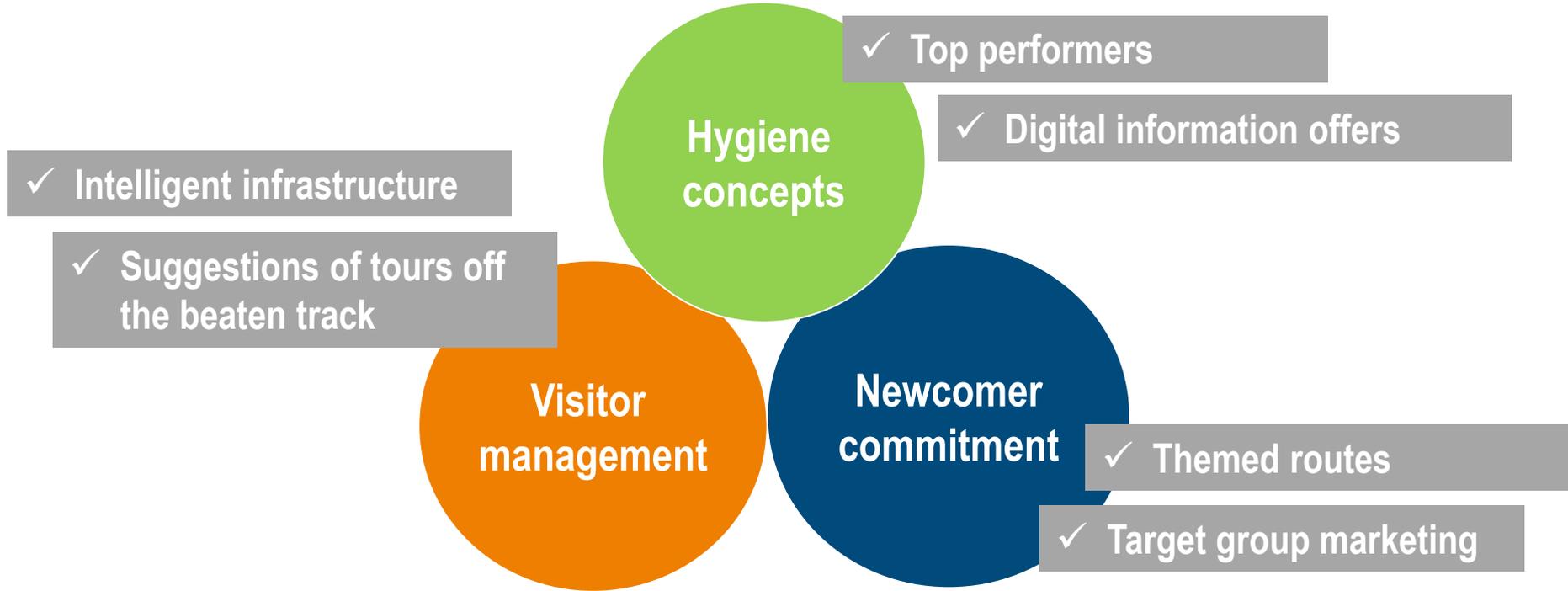


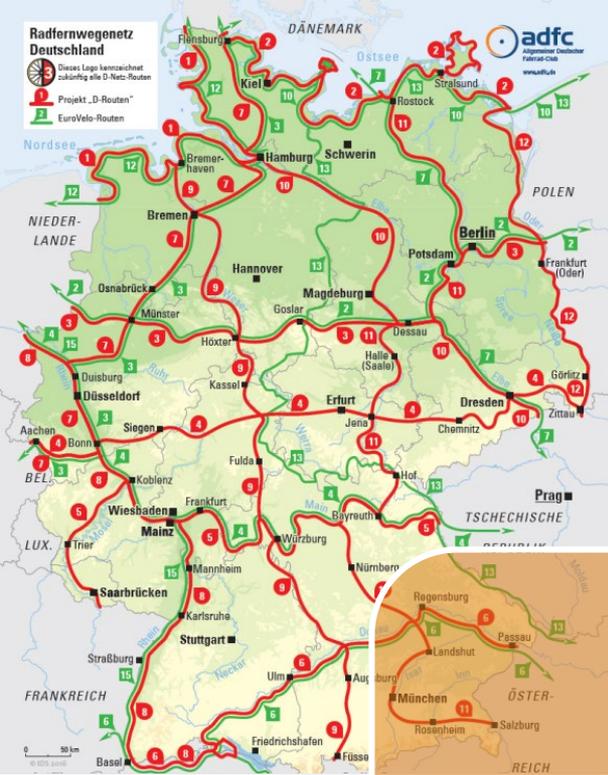
The coronavirus pandemic continues to affect our lives in 2021.

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





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%)



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Seize the opportunities!
€900 million
for cycling

Thank you for your attention!

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