2020 ADFC Bicycle Travel Analysis

21\textsuperscript{st} national survey on the bicycle travel market

Frank Hofmann – Deputy Chairman, ADFC
Louise Böhler – Head of Tourism, ADFC
The ADFC and cycle tourism

Cycling policy and interest representation

Focus areas

Services

ADFC-Travelbike-Radreiseanalyse 2019

Kurzbericht

ADFC-Travelbike-Radreiseanalyse 2019

Kurzbericht
Deutschland per Rad entdecken 2021/22

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

Be there!
13th edition to be released at CMT 2021

www.adfc.de/artikel/deutschland-per-rad-entdecken
Representative online survey

2 national online panels

Panel 1

Total population: cycling in general/short trips/cycling holidays/day trips by bike

Panel 2

Public survey via ADFC channels

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

Evaluation: 8,122 respondents
Weighting of results
No dominance of cycle-enthusiastic ADFC members
Representative results

Respondents aged 18+
77% of Germans cycle

Everyday cycling: 74%
Leisure/travel: 55%
Sport: 28%

Multiple answers possible
Shorter, more spontaneous and varied – cycling is still booming

5.4 million cycle tourists
(-1.8%)

34.3 million day trippers
(+5.5%)

Max. 2 nights

Short cycling trips:
5.2 million people during the week (+27%)
6.8 million people at the weekend (+11%)

Min. 3 nights

() = comparison with 2018

ADFC-Radreiseanalyse 2020
Cycle tourism target groups

- Touring cyclists/point-to-point cyclists
- Regional cyclists

- Cycling trips during leisure time
- Cycling trips while on holiday
Every second person goes on cycling trips

63 million trips while on holiday

330 million trips during leisure time
21 million go on cycling trips during their leisure time

Ø 9 trips

47% city bike
26% mountain bike

79% would like tour suggestions

19% guided tours

85% plan tours themselves

Image: April-Agentur
Trip radius has increased

Every second person travels more than 60 km to start their trip

- 20% (25%)
- 40% (37%)
- 60% (34%)
- 60% (16%)
- 80% (12%)
- > 100 km (13%)

< 20 km (19%)
20–40 km (15%)
40–60 km (21%)
60–80 km (68%)
80–100 km (32%)
> 100 km (60%)

( ) = comparison with 2018 / multiple answers possible

Public transport used more often

Image: April-Agentur
2.6 million go on cycling trips while on holiday

 Ø 4 trips

44% touring bike
43% city bike
13% mountain bike

Activities besides cycling
77% visit towns/cities
75% go hiking
72% go swimming
59% visit cultural sights

Preparation
50% internet research
44% info from tourist office

Image: Max Daerr; Grenzgaengerroute Teute Ems
Where do people go on cycling trips?

<table>
<thead>
<tr>
<th>Location</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Baltic Sea</td>
<td>9.3%</td>
</tr>
<tr>
<td>Allgäu and Bavaria</td>
<td>7.2%</td>
</tr>
<tr>
<td>North Sea</td>
<td>5.6%</td>
</tr>
<tr>
<td>East Frisia</td>
<td>5.4%</td>
</tr>
<tr>
<td>North Sea coast</td>
<td>4.7%</td>
</tr>
<tr>
<td>Lake Constance</td>
<td>3.7%</td>
</tr>
<tr>
<td>Moselle</td>
<td>2.5%</td>
</tr>
<tr>
<td>Harz</td>
<td>2.4%</td>
</tr>
<tr>
<td>Rügen</td>
<td>2.3%</td>
</tr>
<tr>
<td>Eifel</td>
<td>2.2%</td>
</tr>
</tbody>
</table>

In % = mentions
Cycle tourism target groups

- **Touring cyclists/point-to-point cyclists**
- **Regional cyclists**

- **Cycling trips during leisure time**
- **Cycling trips while on holiday**

ADFC-Radreiseanalyse 2020
Cycle tourism market volume

- **Sea/river cruises:** 2.7 million guests in 2018*
- **Coach:** 4.8 million coach holidays in 2018*
- **Caravan:** 0.9 million trips in 2018**
- **5.4 million cycling holidays** (-1.8%)

*Source: BTW / **Statista
Cycle tourists – experienced independent travellers

Ø 53 years old

Main travel season: early summer

Often additional holidays (65%)

Independent organisation preferred (86%)

Female 35%
Male 65%
Growth in digital – print remains constant

**Online**
- Internet: 83% (83%)
- Apps: 36% (27%)

<table>
<thead>
<tr>
<th>Service</th>
<th>Recommend</th>
<th>Cycling maps</th>
</tr>
</thead>
<tbody>
<tr>
<td>Tourist office websites</td>
<td>64% (65%)</td>
<td>32% (37%)</td>
</tr>
<tr>
<td>Free digital maps, e.g. Google Maps</td>
<td>62% (62%)</td>
<td>27% (27%)</td>
</tr>
<tr>
<td>Tour portals e.g. komoot</td>
<td>57% (49%)</td>
<td>27% (27%)</td>
</tr>
<tr>
<td>Hotel portals e.g. HRS, Booking.com</td>
<td>41% (42%)</td>
<td>27% (27%)</td>
</tr>
<tr>
<td>Deutsche Bahn timetable website</td>
<td>36% (41%)</td>
<td>27% (27%)</td>
</tr>
<tr>
<td>State cycle route planner</td>
<td>33% (41%)</td>
<td></td>
</tr>
<tr>
<td>Bett+Bike app/website</td>
<td>24% (21%)</td>
<td></td>
</tr>
</tbody>
</table>

**Offline**
- Recommendations: 49% (46%)
- Cycling maps: 43% (47%)

ADFC-Radreiseanalyse 2020
Signposting remains #1: 72%

Internet: 56%
Apps: 51%
Cycling maps: 51%

Location 80%
Route 66%
Weather 74%
Accommodation 58%
## CYCLE TOURISTS

**Point-to-point cyclists (72%)**
Stay at different locations along their cycle route

- **Average kilometres per day**: 72 km
- Cycle Ø 7 stages
- 66% stay at a hotel
- 51% stay at a guest house
- 43% arrive by train
- 30% arrive by car
- 22% start directly from home

**Regional cyclists (28%)**
Explore a region during circular tours from a fixed base

- **Average kilometres per day**: 56 km
- Cycle their bike on Ø 6 days
- 48% stay at a hotel,
  - One quarter prefer a holiday home
- 14% arrive by train
- 67% arrive by car
Cycling holidays up – CO₂ down

Continuous increase in bicycle transport by train and coach

Travel to/from cycling destination
40% (36%) by car
34% (36%) by train

Source: Deutsche Bahn / Flixbus
Lack of offers reduces motivation

Willingness to travel by train with a bicycle

BUT:

70%: insufficient space to transport bicycles
53%: bicycle-unfriendly railway stations
41%: inconvenient bicycle parking
Guest satisfaction and quality

- Positive response regarding the quality of routes
- Mark of 1.56 awarded by international guests
37 ADFC Quality Routes:
11 x ***
22 x ****
4 x *****

6 ADFC Bicycle Travel Regions
Our congratulations go to:

3-star ADFC Quality Routes
- Paderborner Land Route
- Südschwarzwald-Radweg

4-star ADFC Quality Routes
- Weser-Radweg
- Saar-Radweg
- Glan-Blies-Radweg
- Radweg Deutsche Donau
- DonauTÄLER-Radweg
- Radrunde Allgäu

ADFC Bicycle Travel Regions
- HeideRegion Uelzen
- Inn-Salzach (NEW)

More information:
www.adfc-radtourismus.de
TOP routes and regions
## Most popular cycle routes in Germany

### Top 10 of 115 destinations

<table>
<thead>
<tr>
<th>Route</th>
<th>Rank</th>
<th>Percentage</th>
<th>Change</th>
</tr>
</thead>
<tbody>
<tr>
<td>Weser-Radweg</td>
<td>1</td>
<td>10.29</td>
<td>± 0</td>
</tr>
<tr>
<td>Elbe-Radweg</td>
<td>2</td>
<td>6.33</td>
<td>± 0</td>
</tr>
<tr>
<td>Ruhrtal-Radweg</td>
<td>3</td>
<td>5.09</td>
<td>± 0</td>
</tr>
<tr>
<td>Ostseeküsten-Radweg</td>
<td>4</td>
<td>4.50</td>
<td>± 5</td>
</tr>
<tr>
<td>Bodensee-Königsee-Radweg</td>
<td>5</td>
<td>3.94</td>
<td>± 5</td>
</tr>
<tr>
<td>MainRadweg</td>
<td>6</td>
<td>3.68</td>
<td>± 0</td>
</tr>
<tr>
<td>Mosel-Radweg</td>
<td>7</td>
<td>3.32</td>
<td>± 0</td>
</tr>
<tr>
<td>Donauradweg</td>
<td>8</td>
<td>3.13</td>
<td>- 4</td>
</tr>
<tr>
<td>Altmühltal-Radweg</td>
<td>9</td>
<td>2.89</td>
<td>NEW</td>
</tr>
<tr>
<td>Bodensee-Radweg</td>
<td>10</td>
<td>2.85</td>
<td>- 5</td>
</tr>
</tbody>
</table>

Figures in % | Compared to 2018

- Most popular cycle route in Germany for the second time

ADFC-Radreisanalyse 2020
Most popular federal states

- Bavaria: 22.10%
- Lower Saxony: 15.78%
- North Rhine-Westphalia: 10.85%
- Baden-Württemberg: 9.12%
- Mecklenburg-Western Pomerania: 8.11%

Figures in % | New question, hence no comparison possible to previous year
Most popular regions in Germany for cycling

**Top 10 of 130 regions**

<table>
<thead>
<tr>
<th>Region</th>
<th>Rank</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Allgäu</td>
<td>1</td>
<td>5.57</td>
</tr>
<tr>
<td>Emsland</td>
<td>2</td>
<td>4.21</td>
</tr>
<tr>
<td>Münsterland</td>
<td>3</td>
<td>3.66</td>
</tr>
<tr>
<td>Weser Uplands</td>
<td>4</td>
<td>3.40</td>
</tr>
<tr>
<td>Moselle and Baltic Sea coast</td>
<td>5</td>
<td>3.21</td>
</tr>
<tr>
<td>Lake Constance</td>
<td>6</td>
<td>3.18</td>
</tr>
<tr>
<td>North Sea coast</td>
<td>7</td>
<td>1.92</td>
</tr>
<tr>
<td>Elbe/Elbe Valley</td>
<td>8</td>
<td>1.41</td>
</tr>
<tr>
<td>Black Forest</td>
<td>9</td>
<td>1.40</td>
</tr>
<tr>
<td>Upper Bavaria</td>
<td>10</td>
<td>1.33</td>
</tr>
</tbody>
</table>

Figures in % | New question, hence no comparison possible to previous year.
Most popular cycle routes abroad

<table>
<thead>
<tr>
<th>Route</th>
<th>Rank</th>
<th>Percentage</th>
<th>Change</th>
</tr>
</thead>
<tbody>
<tr>
<td>Via Claudia Augusta</td>
<td>1</td>
<td>5.24</td>
<td>+1</td>
</tr>
<tr>
<td>Donauradweg</td>
<td>2</td>
<td>4.85</td>
<td>−1</td>
</tr>
<tr>
<td>Etsch-Radweg</td>
<td>3</td>
<td>4.09</td>
<td>+3</td>
</tr>
<tr>
<td>Bodensee-Radweg</td>
<td>4</td>
<td>3.58</td>
<td>−1</td>
</tr>
<tr>
<td>Nordseeküsten-Radweg</td>
<td>5</td>
<td>3.43</td>
<td>−1</td>
</tr>
</tbody>
</table>

Figures in % | Compared to 2018
Alpine trend

The Allgäu is the most popular region
Bavaria is the most popular federal state
The Via Claudia Augusta is the most popular international cycle route
E-bike trend

30% of cycle tourists use an e-bike

Proportion of cycle tourists using an e-bike

<table>
<thead>
<tr>
<th>Year</th>
<th>2016</th>
<th>2017</th>
<th>2018</th>
<th>2019</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>13%</td>
<td>18%</td>
<td>23%</td>
<td>29%</td>
</tr>
</tbody>
</table>
Digitalisation trend

The internet remains the #1 source for information
51% of cycle tourists use apps during their trip (46%)
57% use a tour portal to plan their trip (49%)
€900 million
for cycling
Synergies between cycle tourism and everyday cycling

40% of cycle tourists use their bike more in their daily lives (+5%)

50% also use leisure routes for their daily journeys

#MEHRPLATZFÜRSRAD
German cycle network

12 premium routes: central axes with high-quality infrastructure
Information sources:

Our thanks to:

- All of the cycle tourists, who completed our survey
- T.I.P. BIEHL & PARTNER - Markt- und Tourismusforschung
- German National Tourist Board (DZT)
- Deutsche Bahn AG
- FlixBus
- HP Velotechnik
Thank you for your attention!

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