

2020 ADFC Bicycle Travel Analysis

21st national survey on the bicycle travel market

Frank Hofmann – Deputy Chairman, ADFC

Louise Böhler – Head of Tourism, ADFC

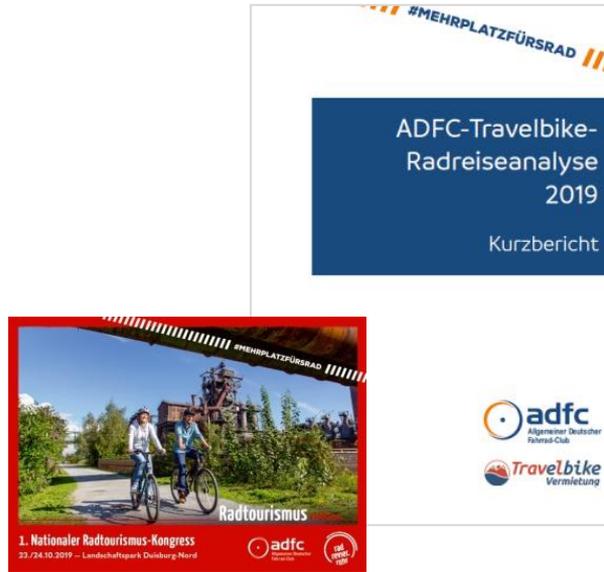


The ADFC and cycle tourism

Cycling policy and interest representation



Focus areas



Services



Deutschland per Rad entdecken 2021/22

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

rad.de/

HOME RADTOUREN MITRADELZENTRALE ÜBERNACHTEN MIT RAD Suchen ... adfc Fahrrad-Club

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

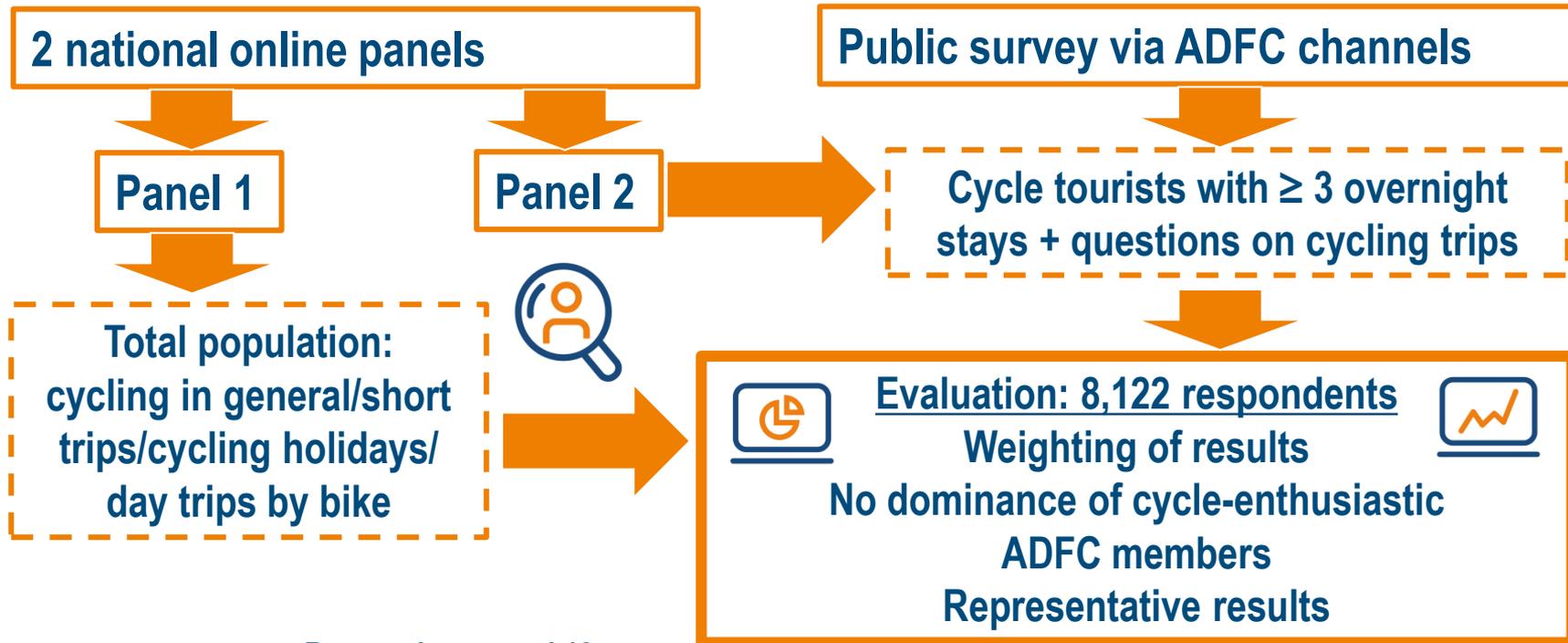
Deutschland auf umweltfreundliche und erholsame Art entdecken
Die Erfolgsbroschüre "Deutschland per Rad entdecken"

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

www.adfc.de/artikel/deutschland-per-rad-entdecken



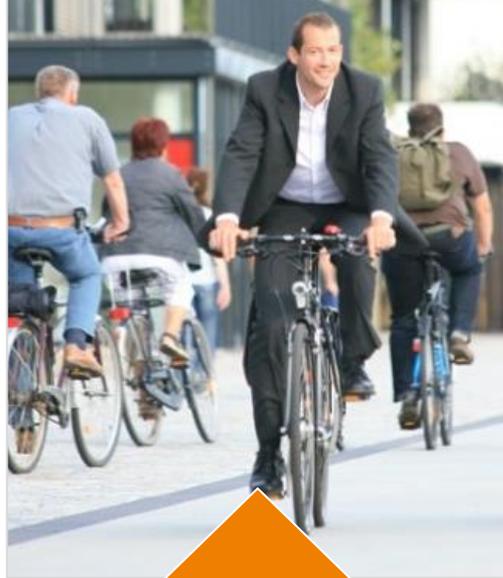
Representative online survey



Respondents aged 18+

77% of Germans cycle

Everyday cycling



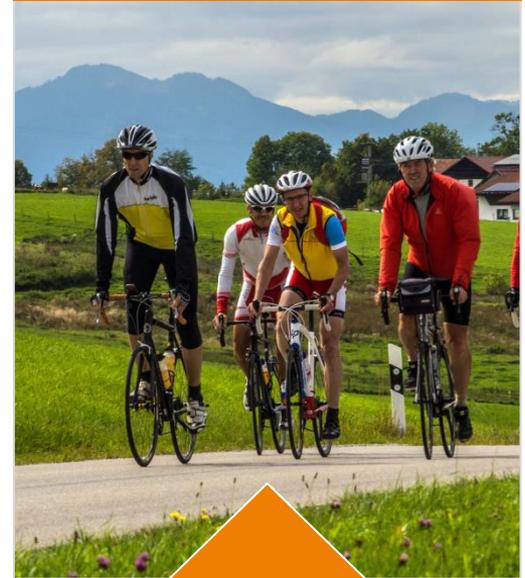
74%

Leisure/travel



55%

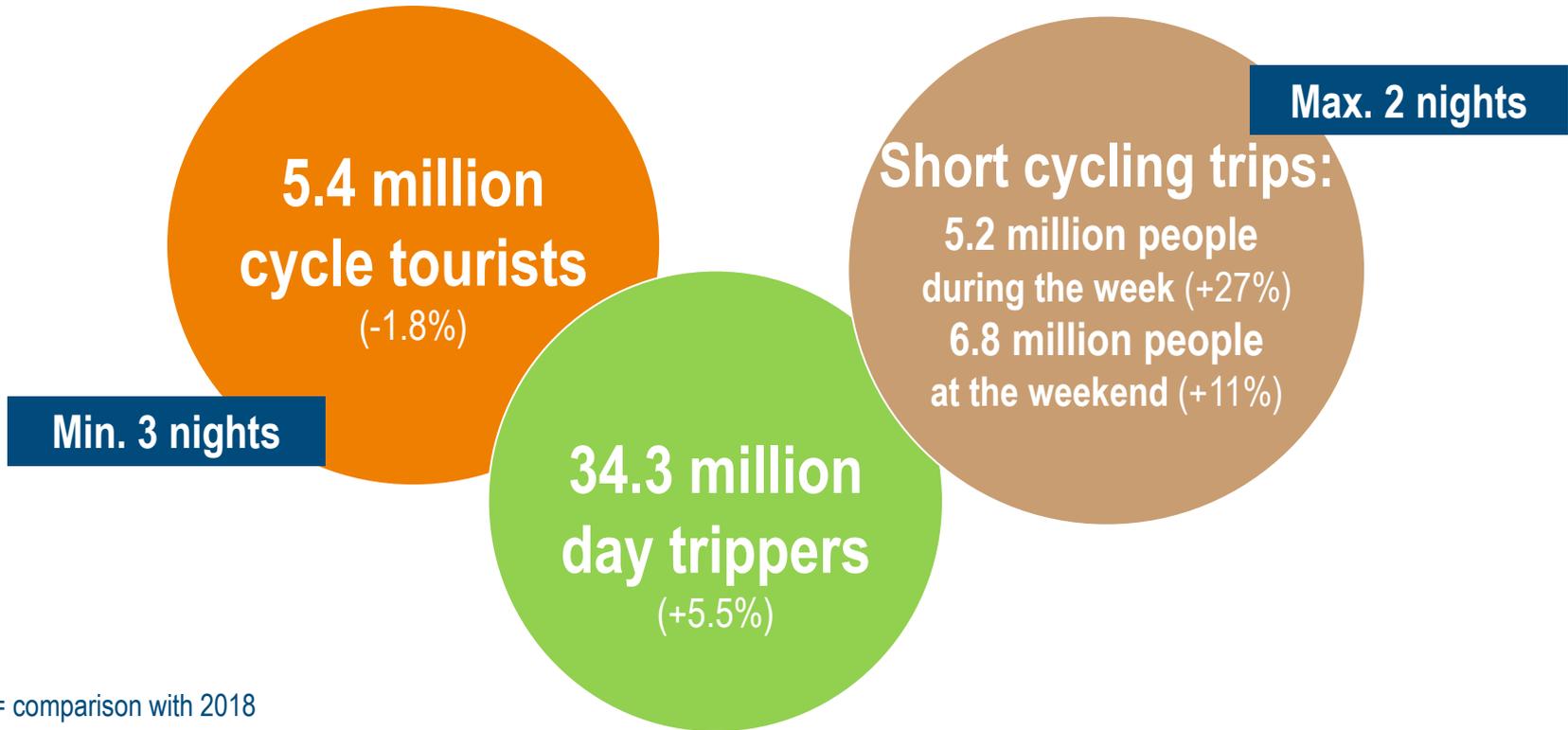
Sport



28%

Multiple answers possible

Shorter, more spontaneous and varied – cycling is still booming



Cycle tourism target groups

Cycle tourism

Touring cyclists/
point-to-point cyclists

Regional cyclists

Leisure

Cycling trips
during leisure time

Cycling trips
while on holiday

Holidays

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

19% guided
tours

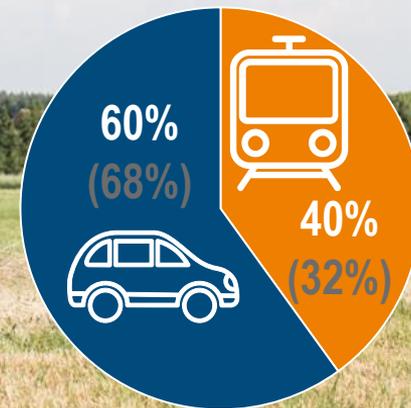
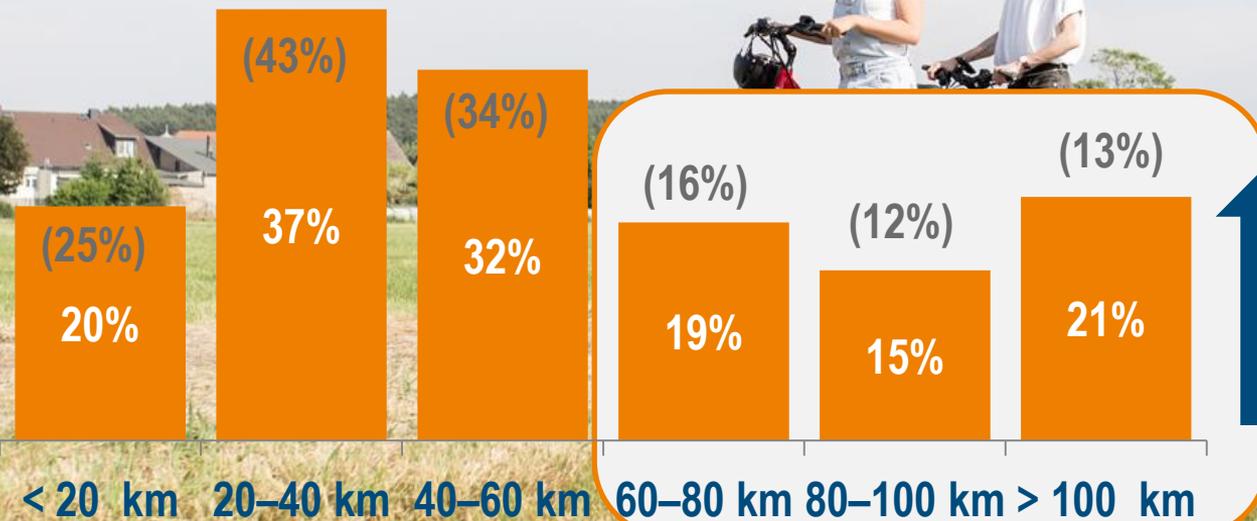
79% would like
tour suggestions

85% plan tours
themselves

Trip radius has increased

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

Public transport used more often



(.) = comparison with 2018 / multiple answers possible

2.6 million go on cycling trips while on holiday

Ø 4 trips

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

Preparation

50% internet research

44% info from tourist office

Activities besides cycling

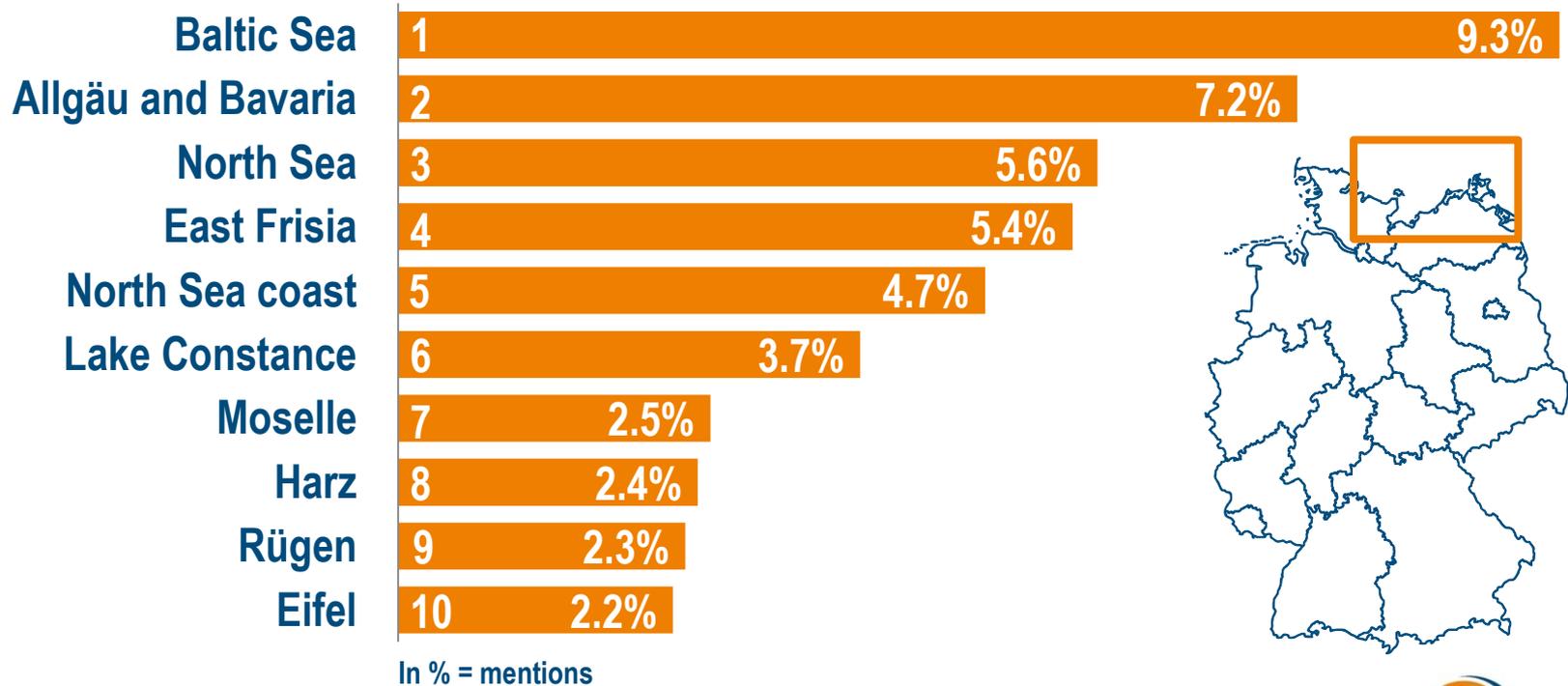
77% visit towns/cities

75% go hiking

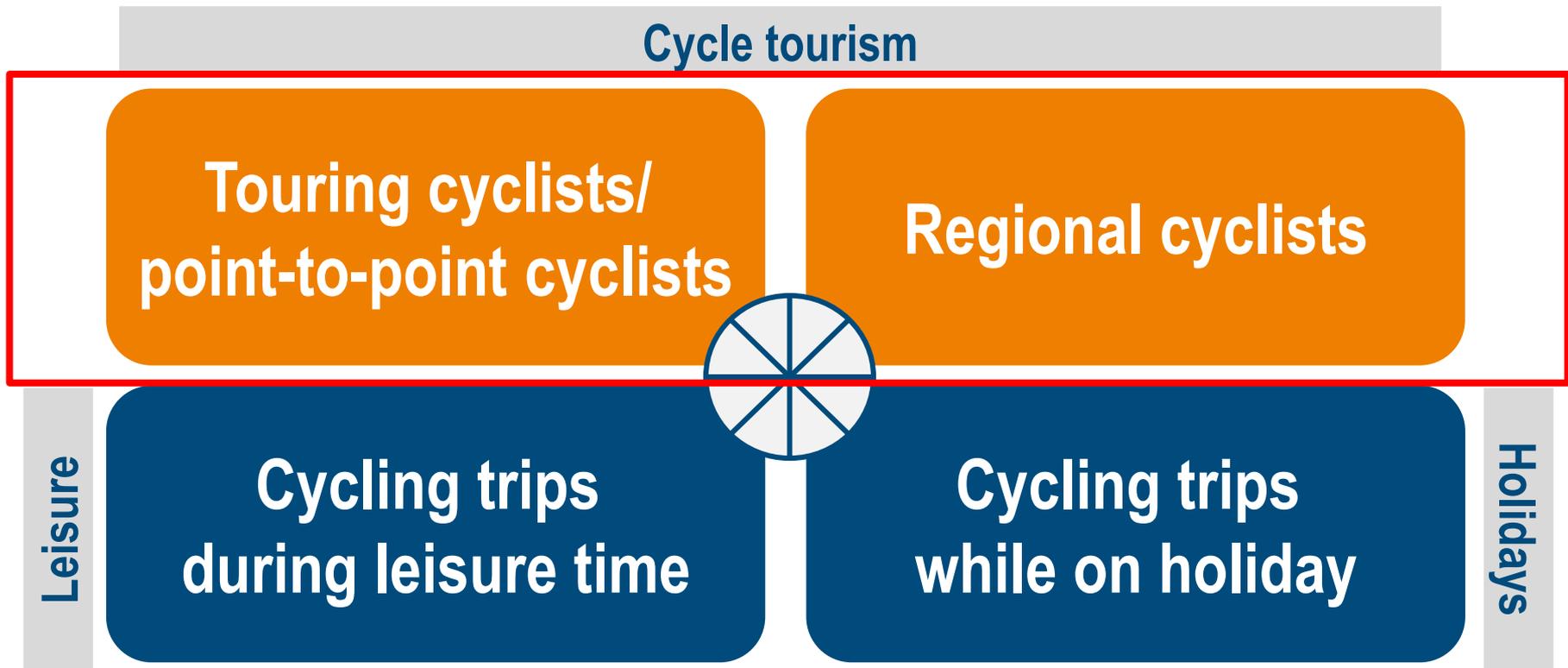
72% go swimming

59% visit cultural sights

Where do people go on cycling trips?



Cycle tourism target groups



Cycle tourism market volume

5.4 million
cycling holidays
(-1.8%)

Sea/river cruises:
2.7 million guests
in 2018*

Coach:
4.8 million
coach holidays
in 2018*

Caravan:
0.9 million trips
in 2018**



Cycle tourists – experienced independent travellers

Ø 53 years old

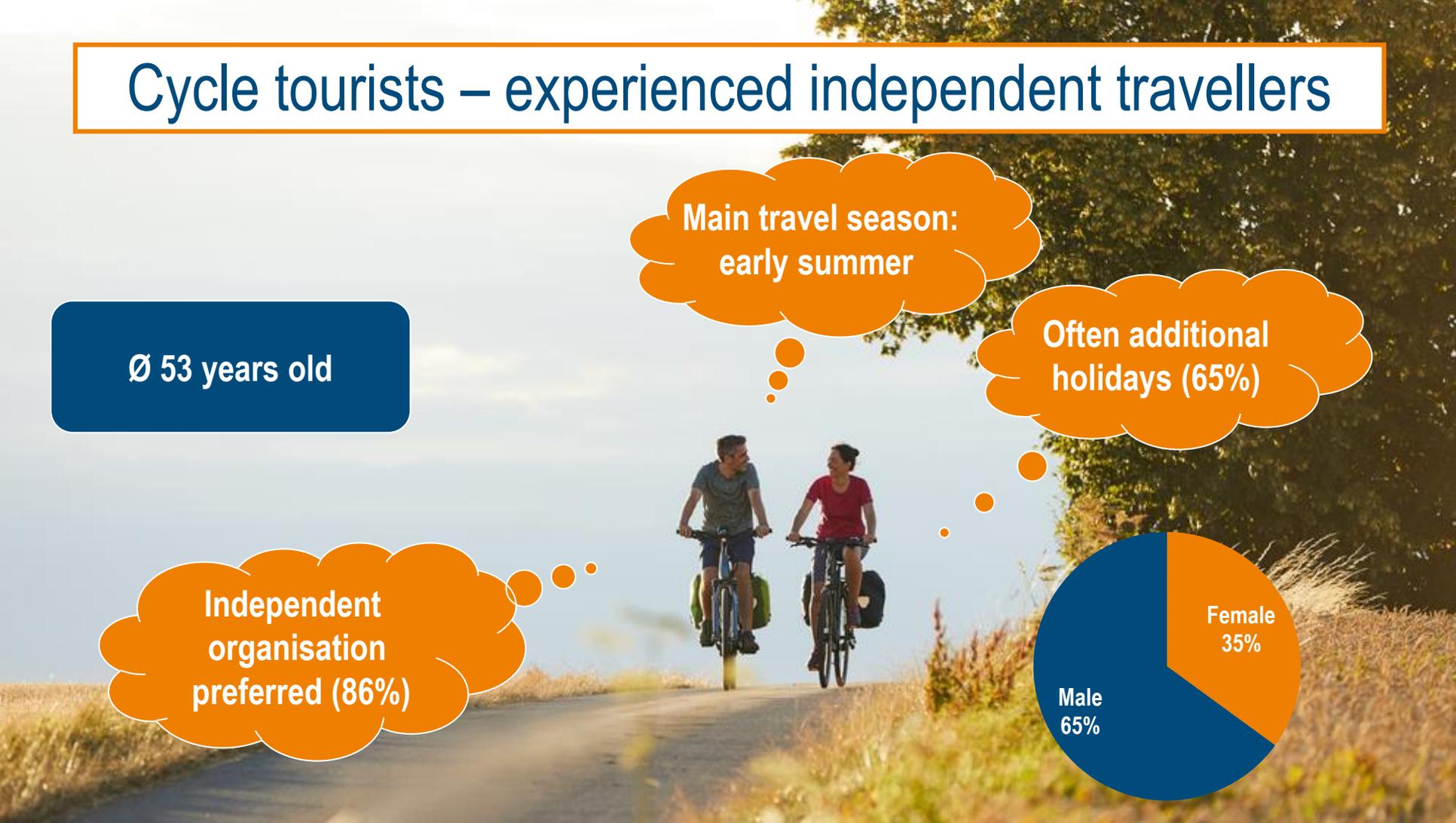
Main travel season:
early summer

Often additional
holidays (65%)

Independent
organisation
preferred (86%)

Male
65%

Female
35%



Growth in digital – print remains constant

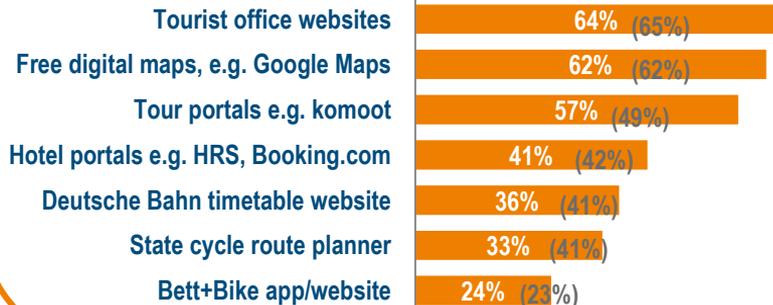
Online



Internet
83% (83%)



Apps
36% (27%)



Recommendations
49% (46%)



32% (37%)



27% (27%)



Cycling maps
43% (47%)



27% (25%)



10% (12%)

Offline

Signposting remains #1: 72%

Internet: 56%

Apps: 51%



Cycling maps: 51%



Location
80%



Weather
74%



Route
66%



Accommodation
58%

Point-to-point cyclists (72%)

Stay at different locations along their cycle route

CYCLE TOURISTS

Regional cyclists (28%)

Explore a region during circular tours from a fixed base

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



Average kilometres per day



56 km

Cycle their bike on **Ø 6** days

48% stay at a hotel,

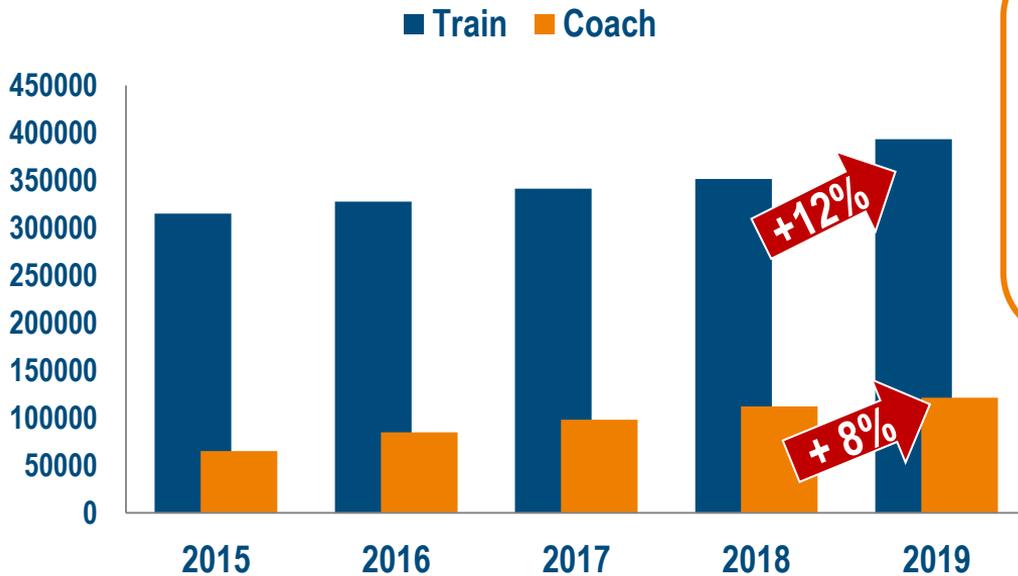
One quarter prefer a holiday home

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

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**

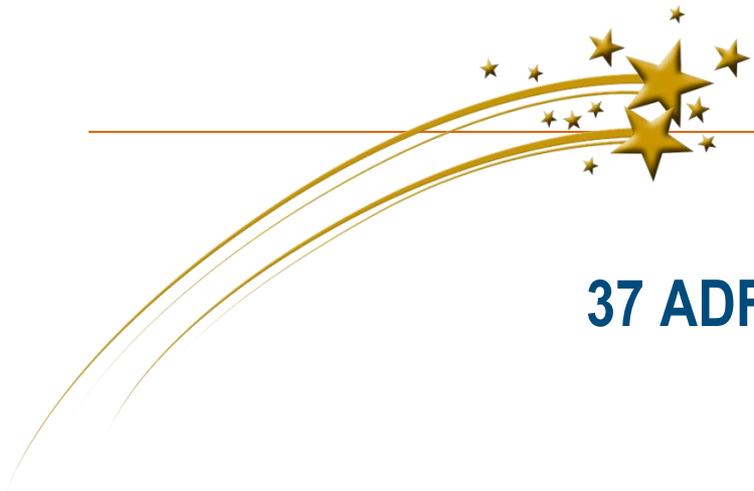
41%:

**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

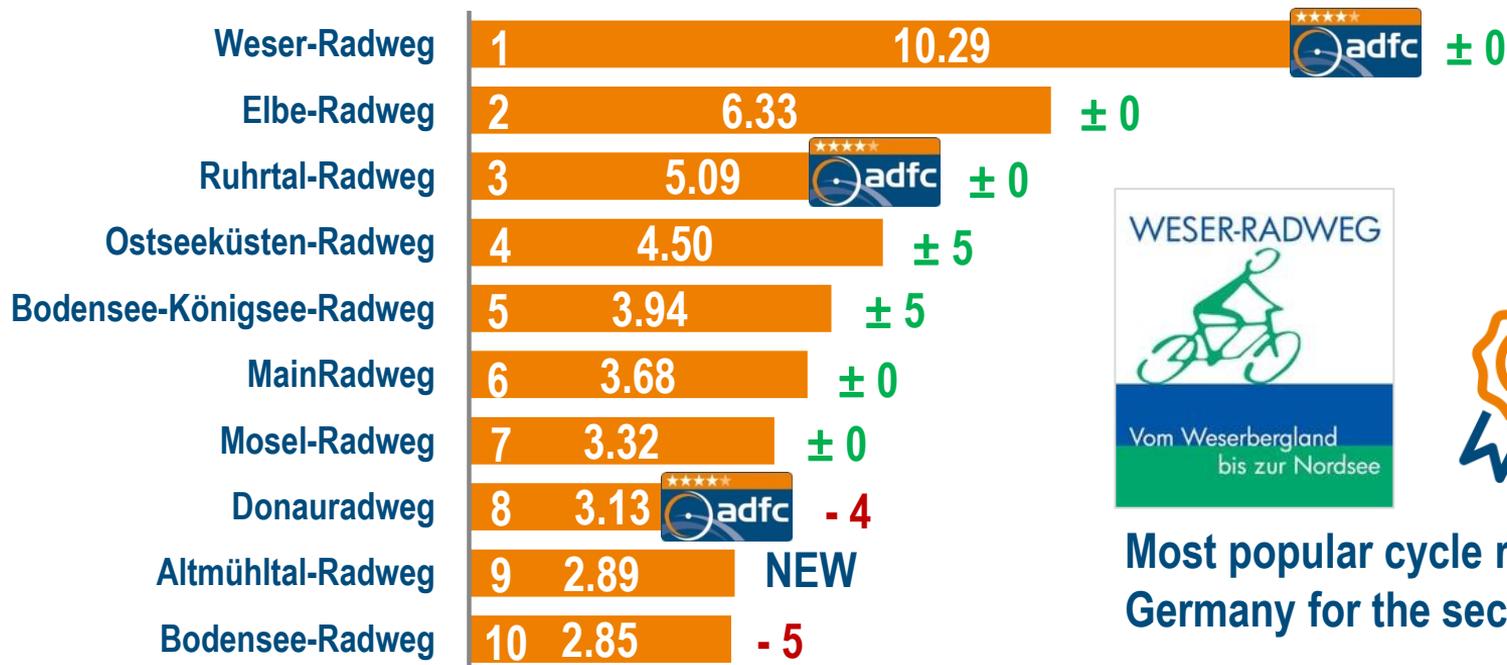


TOP routes and regions



Most popular cycle routes in Germany

Top 10 of 115 destinations



Most popular cycle route in Germany for the second time

Figures in % | Compared to 2018

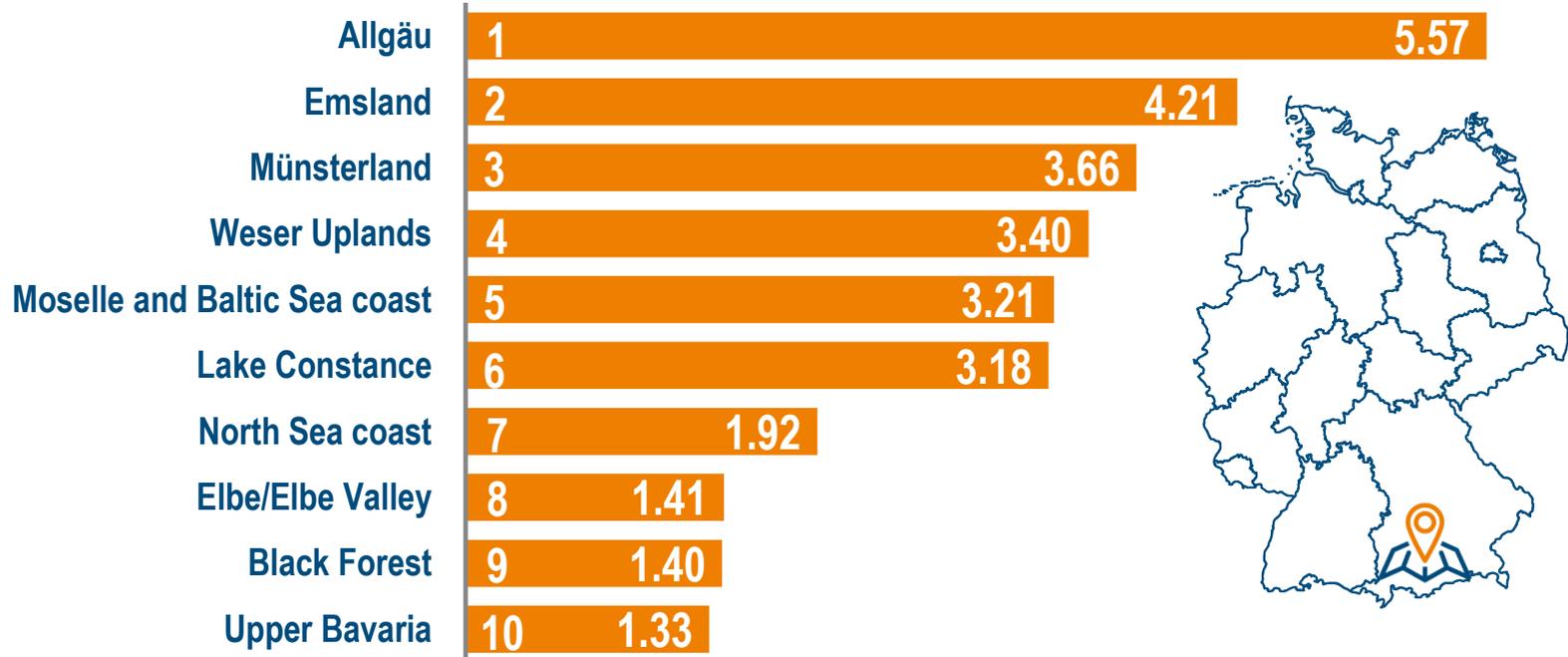
Most popular federal states



Figures in % | New question, hence no comparison possible to previous year

Most popular regions in Germany for cycling

Top 10 of 130 regions



Figures in % | New question, hence no comparison possible to previous year

Most popular cycle routes abroad



Figures in % | Compared to 2018

Alpine trend

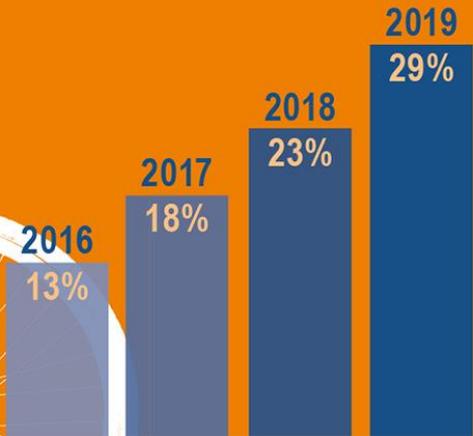
The Allgäu is the most popular region
Bavaria is the most popular federal state
The Via Claudia Augusta is the most popular
international cycle route

E-bike trend

30% of cycle tourists use an e-bike



Proportion of cycle tourists using an e-bike



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

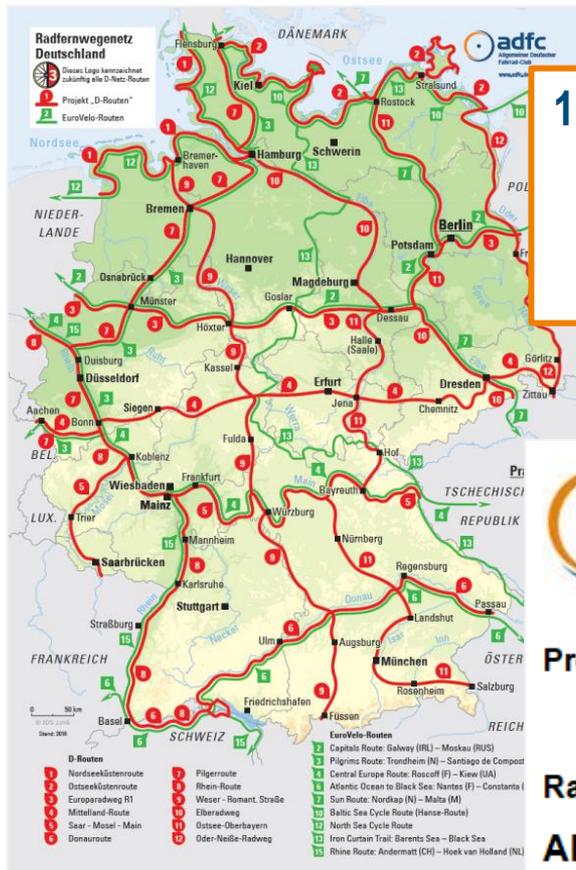


40% of cycle tourists use their bike more in their daily lives (+5%)

50% also use leisure routes for their daily journeys

#MEHRPLATZFÜRSRAD

German cycle network



12 premium routes:
central axes with
high-quality
infrastructure



Pressemitteilung

Radtourismus-Kongress

ADFC fordert nationale Entwicklungsagentur für „Radnetz Deutschland“



Bundesministerium
für Verkehr und
digitale Infrastruktur



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!

German National Cyclists' Association
Allgemeiner Deutscher Fahrrad-Club e. V. (ADFC)
Mohrenstraße 69, 10117 Berlin, Germany

Tel.: +49 30 209 14 98-0

Email: tourismus@adfc.de

Website: www.adfc.de

Follow us:

