

# 2016 ADFC Bicycle Travel Analysis

17<sup>th</sup> national survey on the bicycle travel market  
Internationale Tourismus-Börse Berlin, ITB



# German Cycling Embassy®

The ADFC presented Germany as a leading cycle tourism destination at the Velo-City Global 2016 in Taipei:

## Cycle Tourism “Made in Germany”

- Exploring the secrets to Germany’s cycle tourism success
- Quality as the key to success
- The Ruhr Valley Cycle Route



# Discover Germany by bike

Cooperation between the ADFC and the German National Tourist Board (DZT): successful national and international marketing of Germany as a bicycle travel destination for the past 16 years.



[www.adfc.de](http://www.adfc.de)

Home » Freizeit & Erholung » Radfahren » Albtäler-Radweg

## Albtäler-Radweg – als die Welt jung war

Die **Schwabische Alb** begeistert nicht nur durch ihre einzigartige Landschaft, sondern auch durch spannende Einblicke in eine Zeit als Mammuts durch die Täler zogen und die Menschen noch in Höhlen wohnten.

Radfahren von A-Z

Mediengalerie

adfc

Der Albtäler-Radweg, eine ADFC-4-Sterne Qualitätsradroute, führt durch die schönsten Landschaften des **GeoParks Schwabische Alb**. Typische Wacholderheiden, urzeitliche Felslandschaften und geheimnisvolle Höhlen säumen den Weg. Im Archäopark Vogelherd gibt es Steinzeitfunde zu bestaunen, und im Eselsburger Tal regen bizarre Gesteinsformationen die Fantasie an. Weiter geht es durch das Natur- und Landschaftsschutzgebiet bei Herbrechtingen und zur HöhlenErlebnisWelt Charlottenhöhle in Giengen-Hürben. Hübsche Albdorfer und Heilbäder wie Bad Überkingen und Bad Ditzenbach laden ein zu Rast und Ruhe. Wahlweise in einem der vielen Gasthäuser, oder in einem der Thermalbäder, wo sich Kraft tanken lässt für die nächsten Etappen.

**Charakter:** Rundtour auf vorwiegend gut ausgebauten, asphaltierten Rad- und Wirtschaftswegen, teilweise hügelig, gelegentlich stärkere Steigungen.

**Landschaft:** Streckenverlauf durch Fluss- und Trockentäler mit Wacholderheiden, Felsformationen und Höhlen; des Weiteren über Höhenzüge der Schwabischen Alb.

Suche auf [germany.travel](http://germany.travel)

Mein Reiseplaner

Planen Sie hier Ihre Deutschlandreise. Einfach Favoriten hinzufügen, Reihenfolge festlegen und losfahren!

Reiseziel hinzufügen

0 Favoriten ausgewählt [Reiseplaner öffnen](#)

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Germany Tourism  
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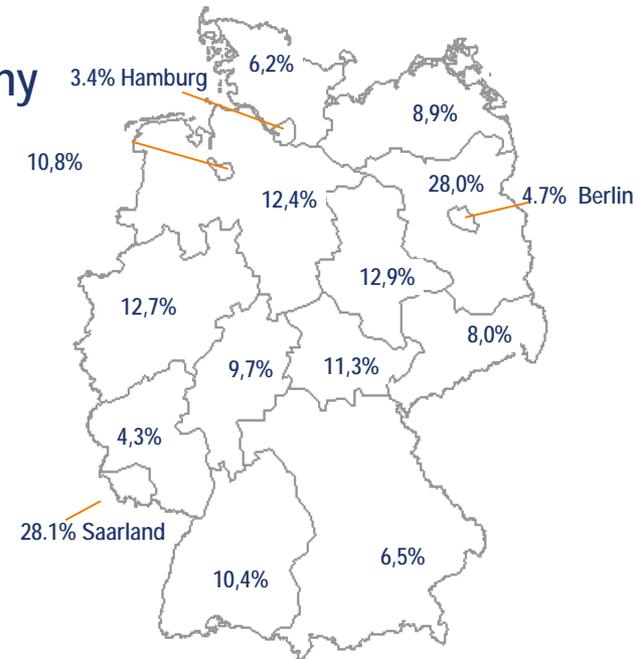
[www.germany.travel](http://www.germany.travel)

# Bett+Bike hosts



**NEW:**  
5,500 Bett+Bike hosts listed  
on an overview map of Germany

**NEW:**  
6,000 hosts listed in the  
Bett+Bike app (500 in Austria,  
Belgium, Denmark, Luxembourg)



**Bett+Bike market penetration:**  
proportion of Bett+Bike hosts overall  
(excluding private accommodation)

[www.bettundbike.de](http://www.bettundbike.de)



# 2016 ADFC Bicycle Travel Analysis

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ADFC data base:

- Complete survey by an impartial service provider

2-step approach

- National representative online panel
- Public survey via the ADFC homepage

Response:

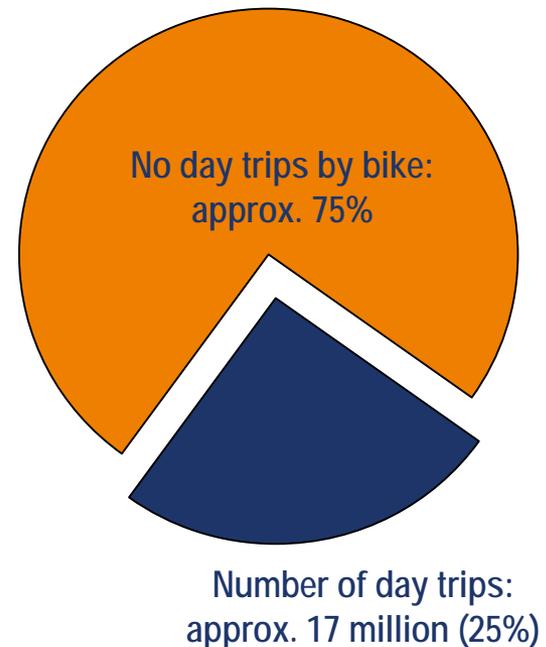
- Online panel: 4,223 respondents, of which 1,063 completed one or more cycling trips with at least three overnights stays in the past three years
- Public survey: 2,000 respondents, of which 1,535 completed one or more cycling trips with at least three overnights stays in the past three years

Adjustment of the different samples using a weighting procedure to prevent any dominance by ADFC members or participants close to the ADFC.

# Days trips by bike in 2015

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- Criterion: trips for which the main purpose was to cycle
- Proportion of day trippers of the total population in 2015: 25%
- Extrapolated to the total population over the age of 18: approx. 17 million
- Average number of day trips: approx. 8.8 day trips/person
- Extrapolated to the total population: approx. 150 million day trips in 2015

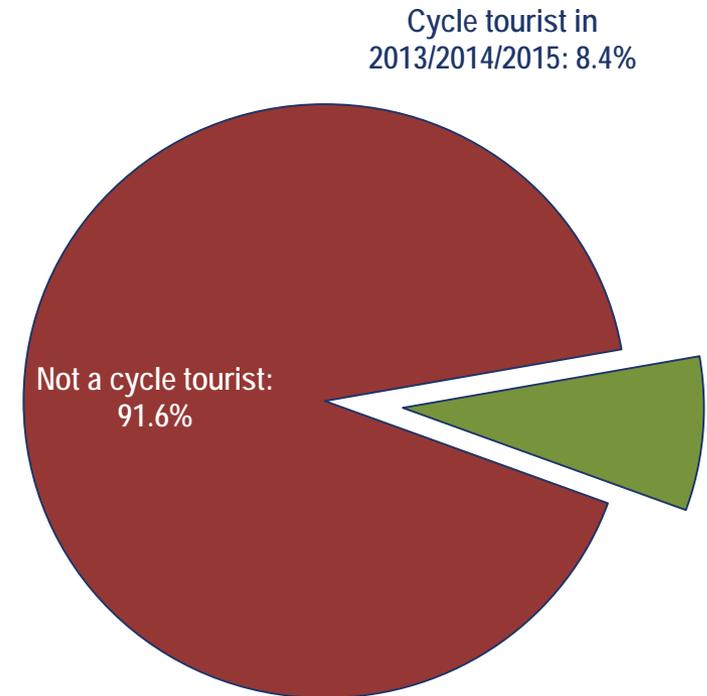


Did you go on at least one day trip in 2015 during which the main purpose was to cycle? (n = 4,205)

# Cycle tourists between 2013 and 2015

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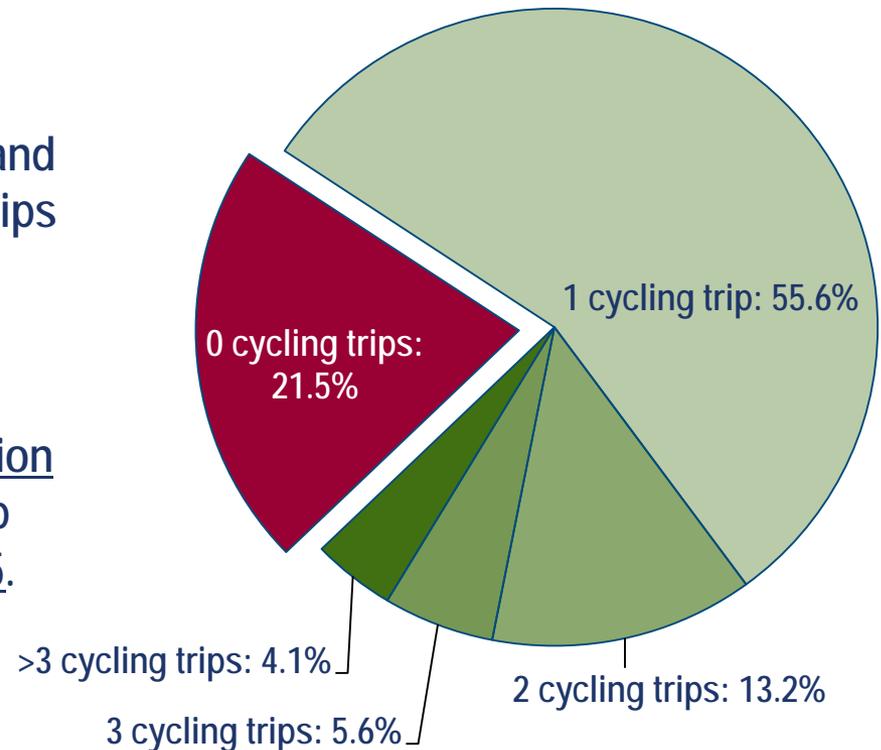
- In relation to the total population, around 8% of Germans went on a cycling trip in the past three years (= a trip during which cycling was one of main motivations).
- Extrapolated to the total population (over the age of 18 = 68.1 million), which corresponds to approx. 5.7 million cyclists, who completed a cycling trip with at least three overnight stays in the past three years.



Have you completed at least one CYCLING TRIP with at least three overnight stays in the past three years (2013, 2014 and 2015)? (n = 3,458)

# Proportion of cycle tourists in 2015

- Of the cycle tourists in the past three years, approx. 78% also completed at least one cycling trip with at least three overnight stays in 2015.
- Approx. 56% completed one cycling trip and approx. 23% completed several cycling trips in 2015.
- Extrapolated to the total population in Germany (over the age of 18), this means that approx. 7% (6.6%) or approx. 4.5 million people completed at least one cycling trip with at least three overnight stays in 2015.
- 11% increase compared to 2014  
(4.0 million)



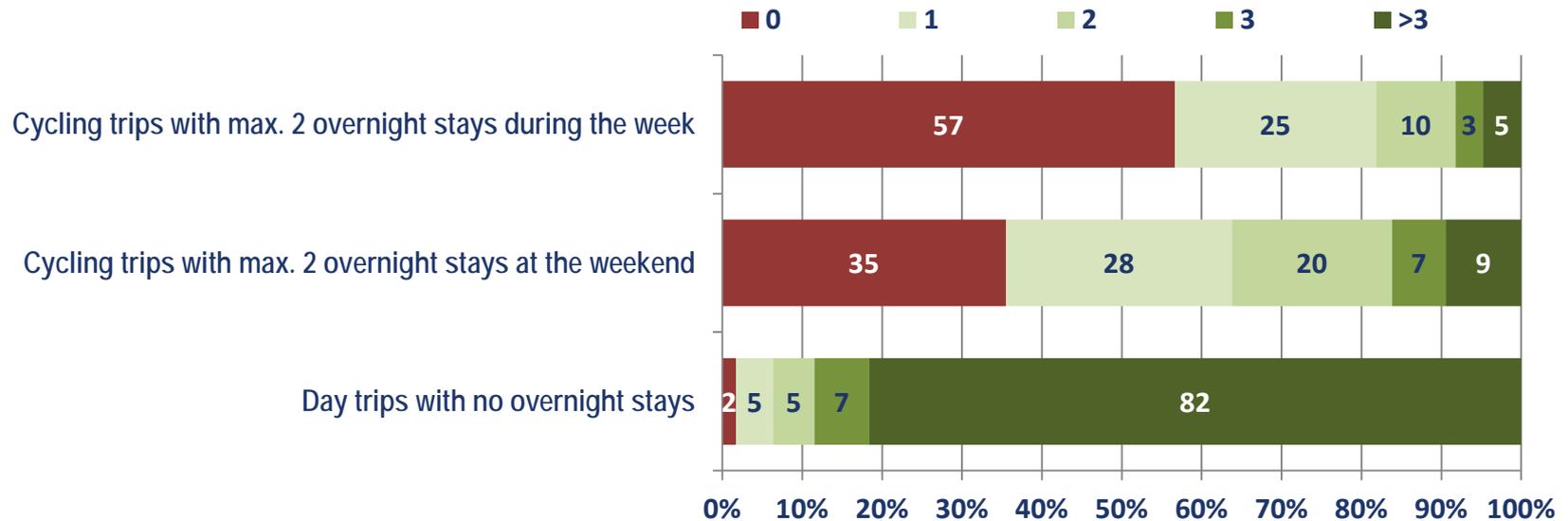
In the following overview, please indicate how many cycling tours or trips you completed in 2015: cycling trips with at least three overnight stays (n = 2,560)

# Volume of cycle tourists in 2015

Cycle tourists like to travel. Beside the cycling trips with at least three overnight stays, cycle tourists completed countless other cycling tours and trips in 2015.

Increases compared to 2014:

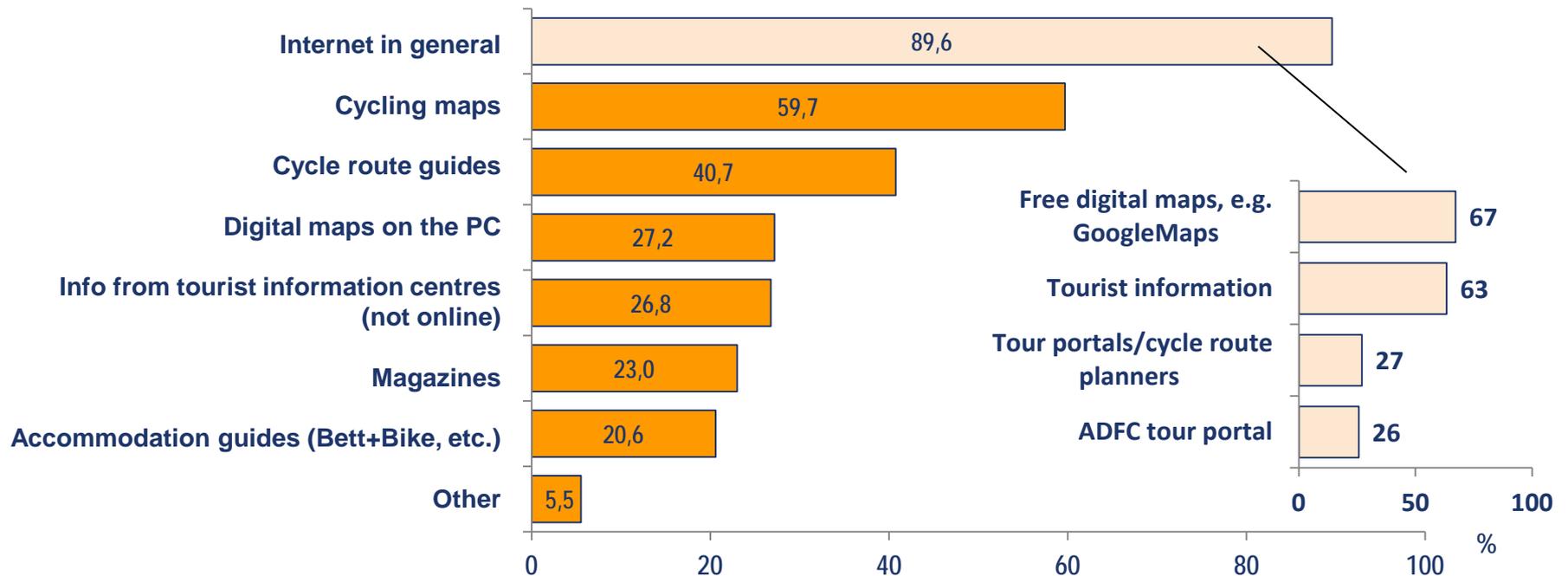
- 43% (+10% compared to 2014): more multi-day cycling tours during the week
- 65% (+6%): at least one cycling trip over the weekend
- 98% (+5%): at least one day trip



In the following overview, please indicate how many cycling tours or trips you completed in 2015 (n = 2,560 unweighted)

# Information sources used to plan trip

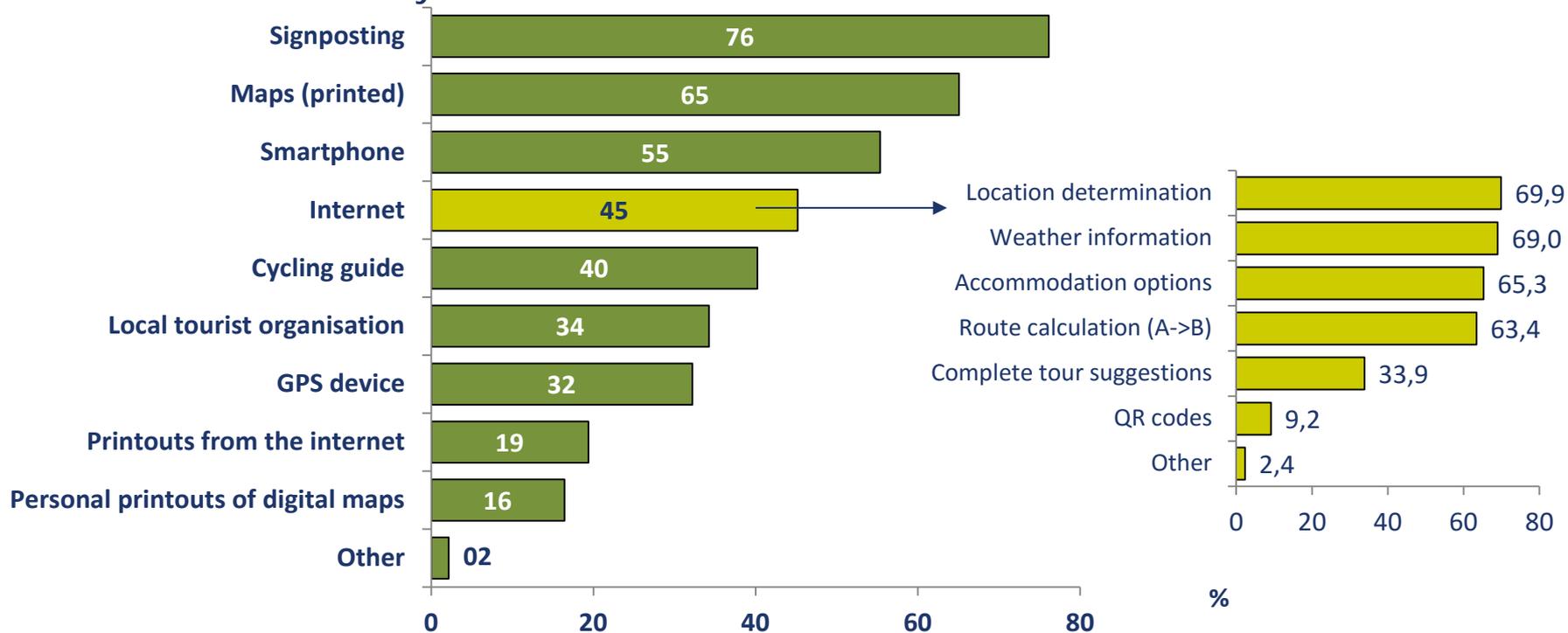
- The internet is by far the most popular source of information for cycle tourists.
- Almost 60% of respondents use classic cycling maps.



Think of the general preparations and planning for your cycling trip. Which sources of information did you mainly use to plan your trip? (n = 2,539 unweighted)

# Orientation during cycling trips

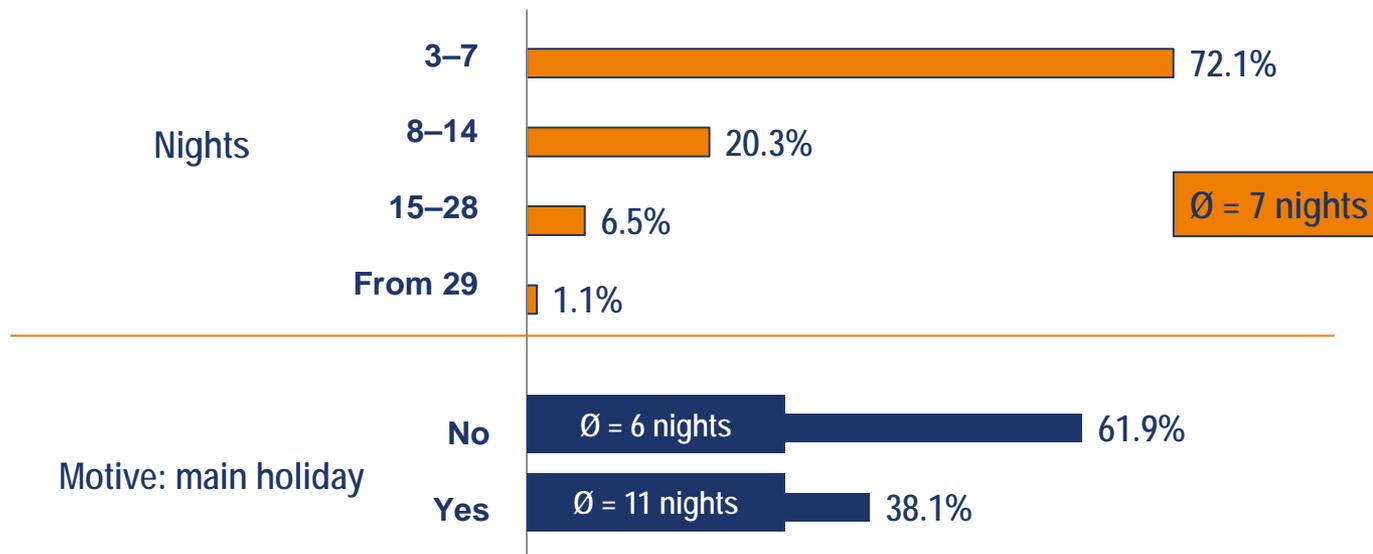
- Despite the new media, signposting is still decisive.
- Classic maps are also considerably more important than the mobile internet when on a cycling trip.
- Around one third of cycle tourists use a GPS device.



Which sources of information and media do you use for orientation during your cycling holiday/trip? (n = 2,533 unweighted)

# Duration of cycling trips in 2015

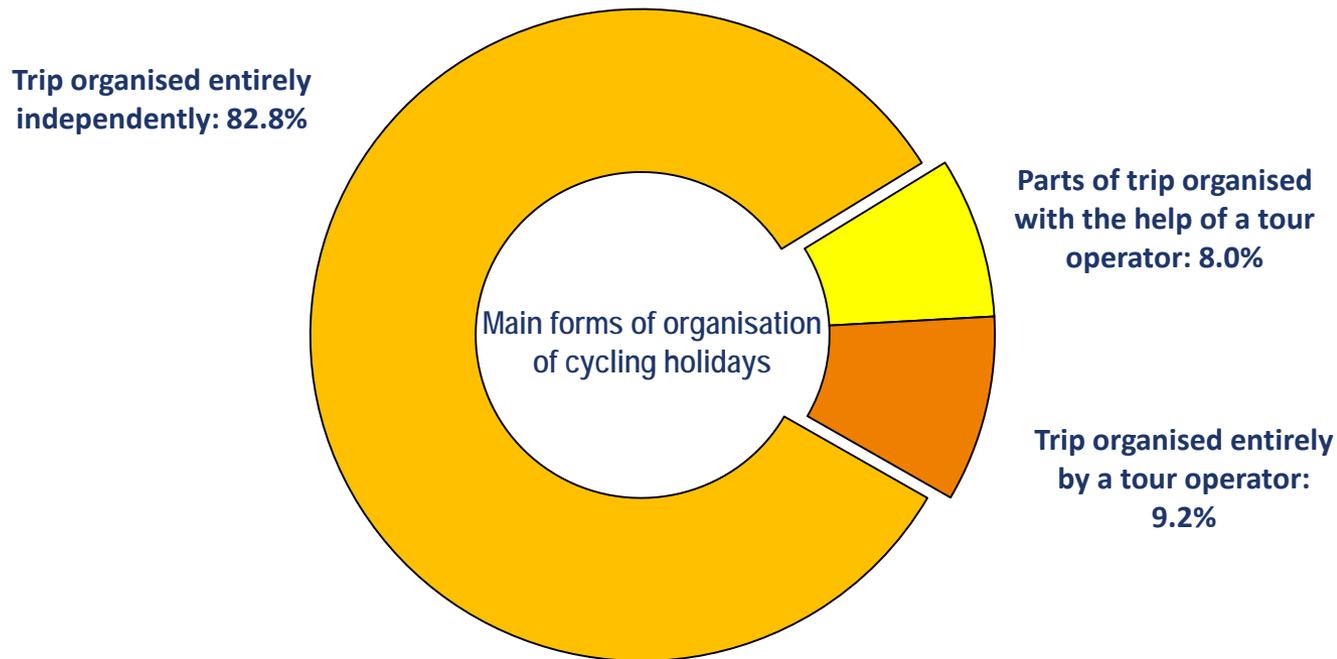
- Short trips lasting up to one week are most common.
- The proportion of short trips has increased compared to 2014 (+5%).
- For almost 40% of cycle tourists, the cycling holiday completed in 2015 was their main holiday, comprising an average of 11 nights.



Nights: We would now like to know a little more about your longest cycling trip in 2015. How many nights did you spend on this trip? (n = 2,164 unweighted)  
Main holiday as the motive: was this cycling trip your main holiday in 2015? (n = 2,164 unweighted)

# Bicycle travel = individual travel

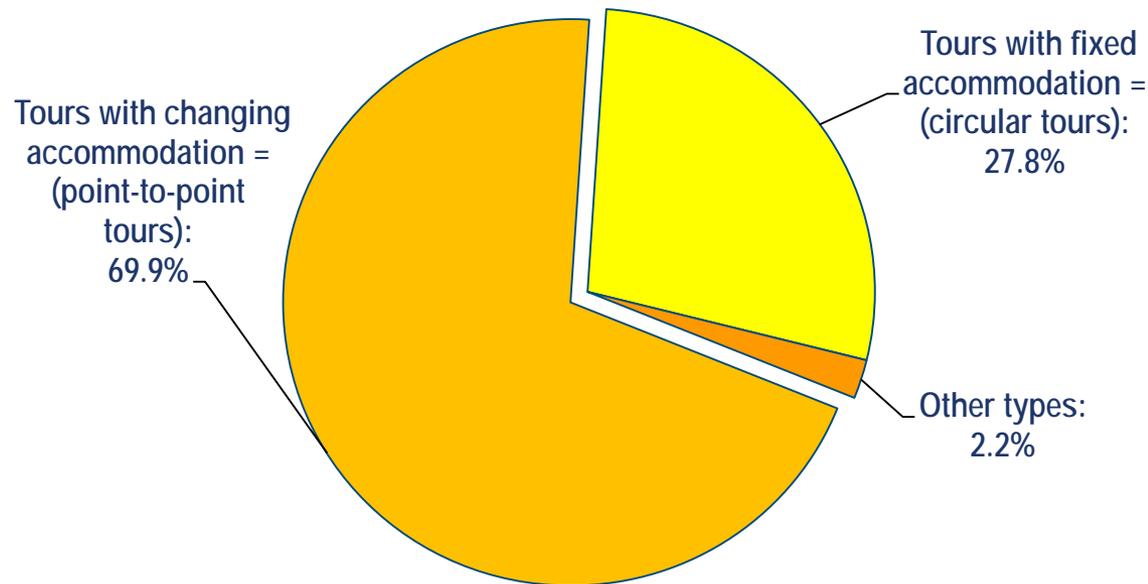
- Over 80% of cycling trips were organised entirely independently.
- Organised tours/package trips played a lesser role, totalling under 10%.
- Cycle tourists over the age of 65 are more likely to opt for a package trip (approx. 30%).



How did you organise your longest cycling holiday in 2015? (n = 2,163 unweighted)

# Circular or point-to-point tours

- Point-to-point tours were the preferred type of tour among almost 70% of respondents.
- Slight increase in circular tours from fixed accommodation (+2.5% compared to 2014)
- Circular tours tend to be more popular during short trips. Longer cycling trips lasting 2 weeks are rarely circular tours.

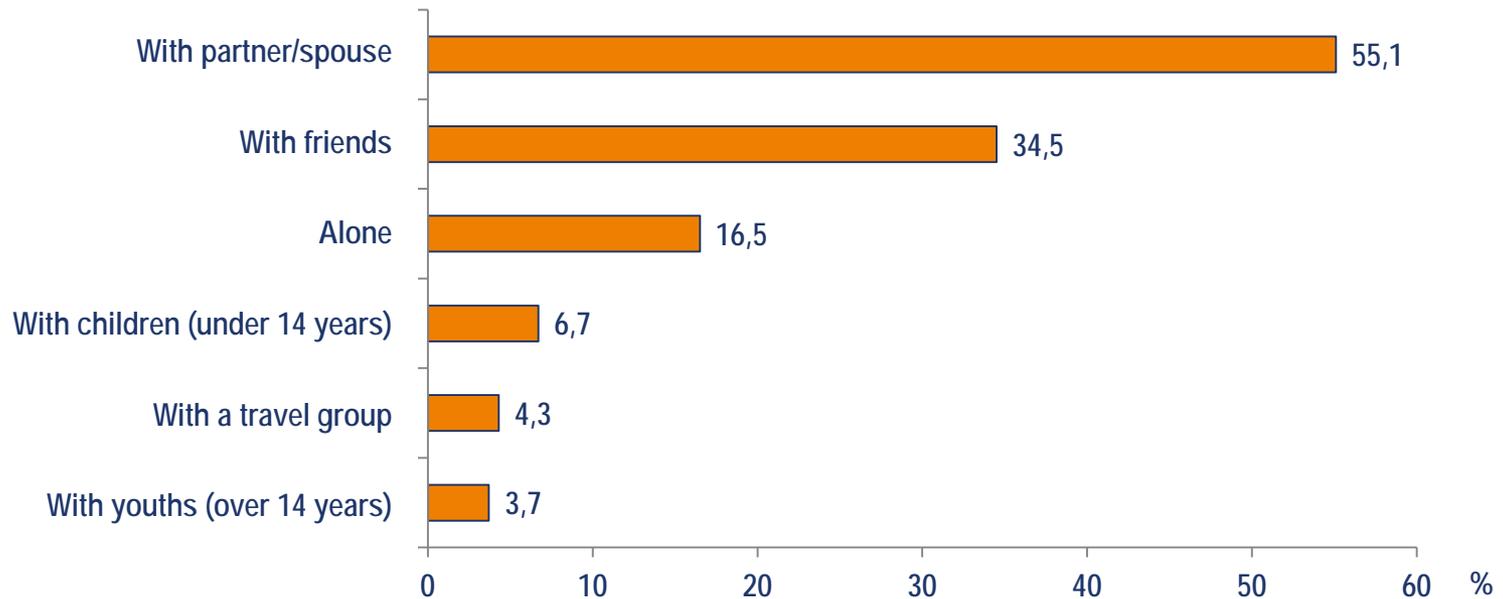


Think back to your longer cycling trip in 2015: was it a circular tour or a point-to-point tour? (n = 2,159 unweighted)

# Travel companions

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- Half of cycle tourists completed the trip with their partner/spouse.
- Cycling trips are also often completed with friends.
- A large number of cycling trips (approx. 17%) were undertaken alone, too.

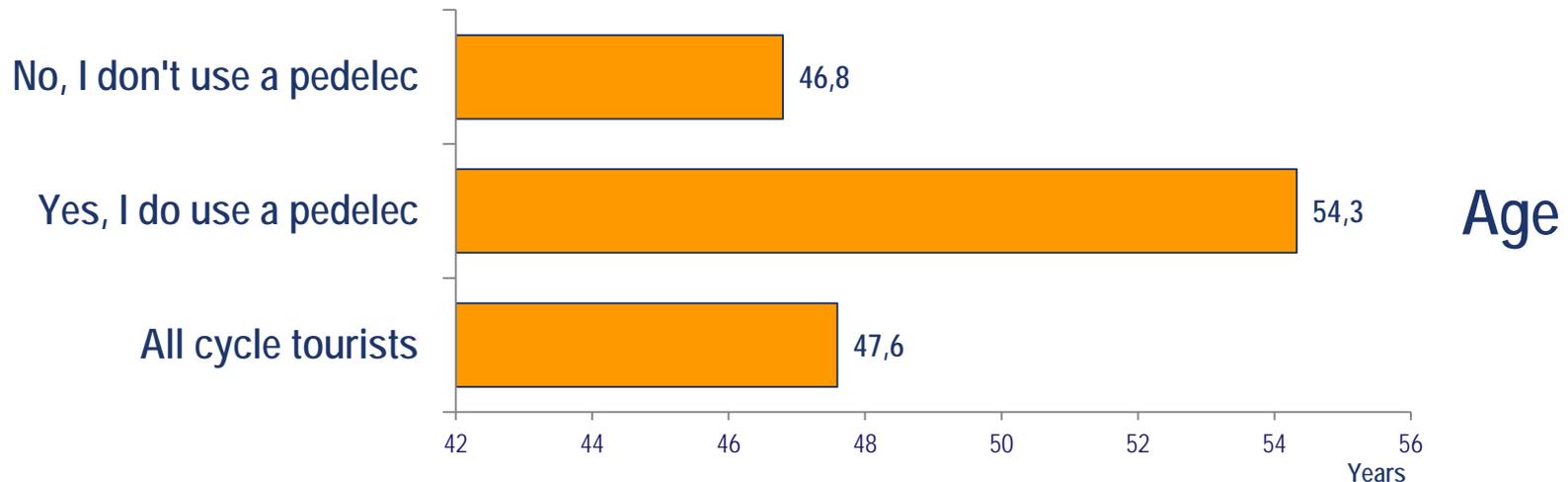


Who did you complete your cycling trip with? (n = 2,156 unweighted)

# Pedelec users

Pedelec users are very different from other cycle tourists:

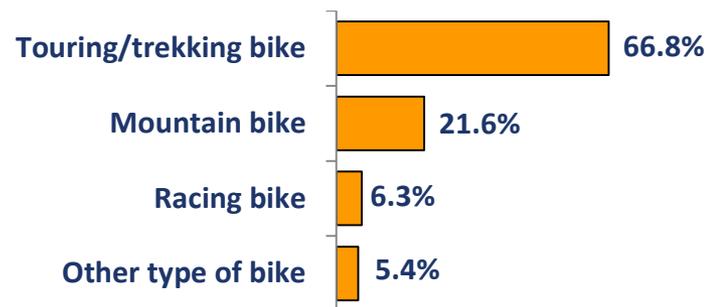
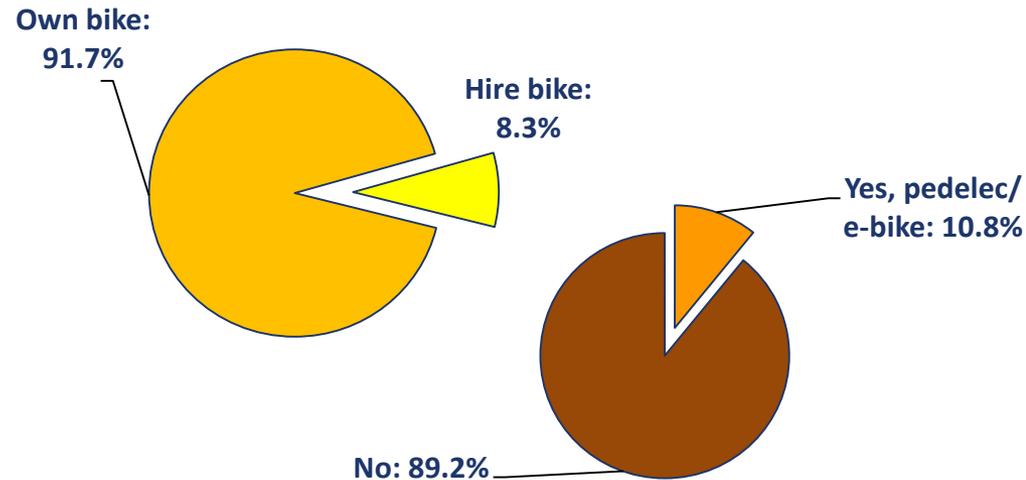
- significantly older (54.3 years compared to 47.6 years)
- more females (53% of pedelec users are female, compared to 34% of cyclists)
- more likely to cycle with their partner (67% compared to 54%)
- often travel to their cycling destination by car (57% compared to 39%)
- more likely to take advantage of tour offers (14% compared to 9%)



Please also indicate whether you use a pedelec or e-bike. (n = 2,003 unweighted)

# Bicycle used for travel

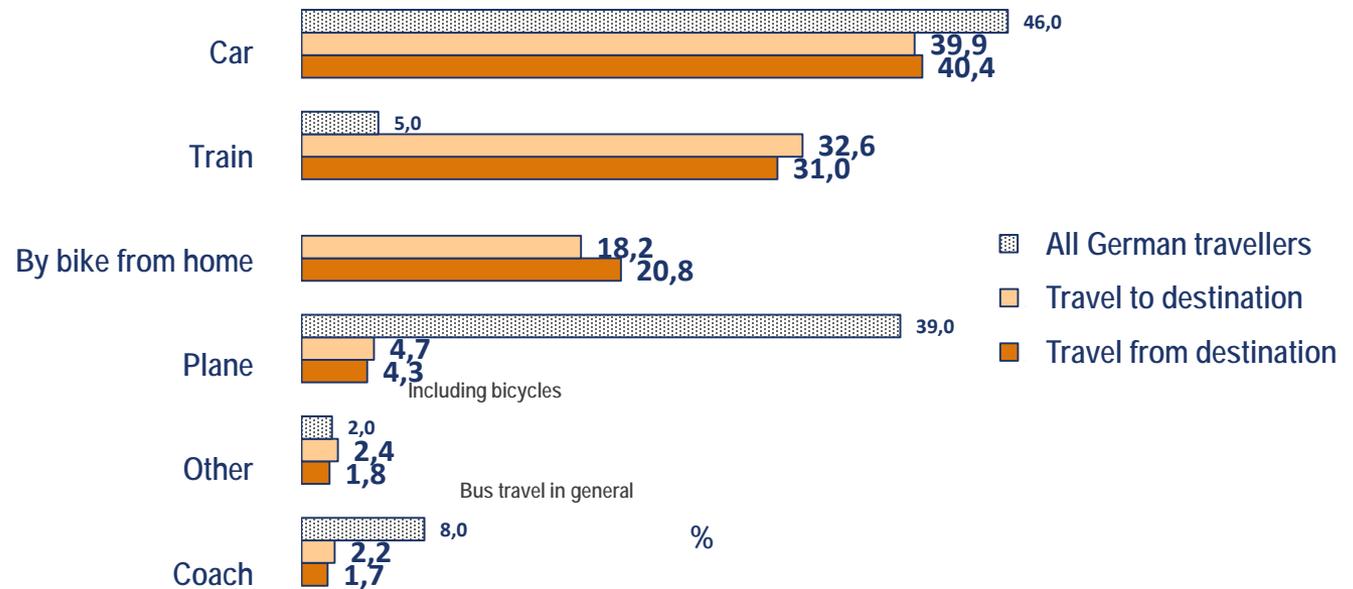
- Cycle tourists rarely use hire bikes. They almost always use their own bike.
- The proportion of pedelecs/e-bikes among cycle tourists has almost doubled since 2014 to 11%.
- The bicycle used is mostly a touring or trekking bike.



Did you use your own bike or a hire bike for your cycling trip? (n = 2,148 unweighted)

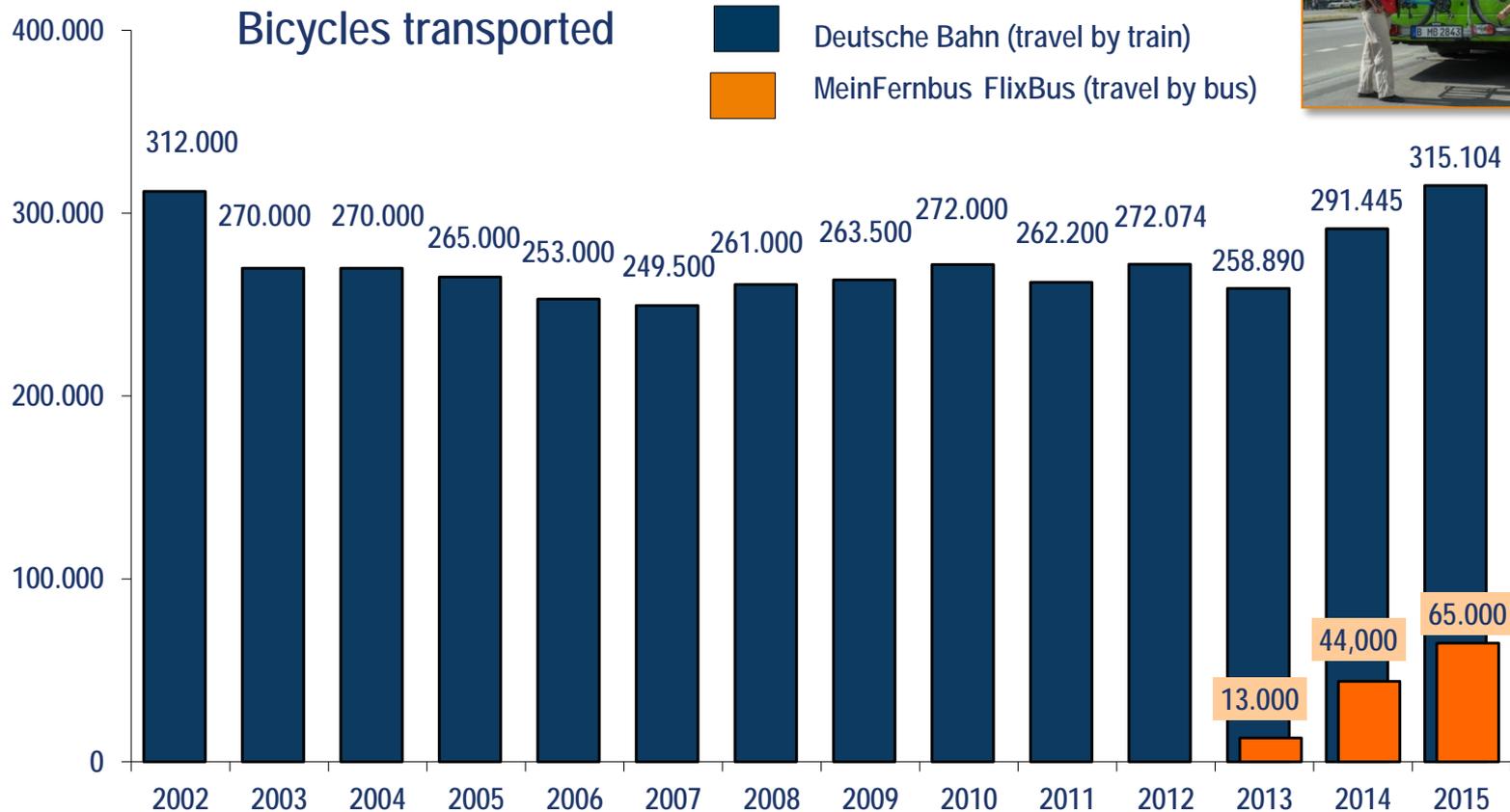
# Travel to and from the cycling destination

- Travel by train is popular during cycling trips: around one third of cycle tourists travel to their cycling destination by train.
- Despite this, cars also remain an important mode of transport for cycle tourists (approx. 40%).
- Travel by plane is minimal. Every fifth cycle tourist completes their cycling trip entirely by bike.



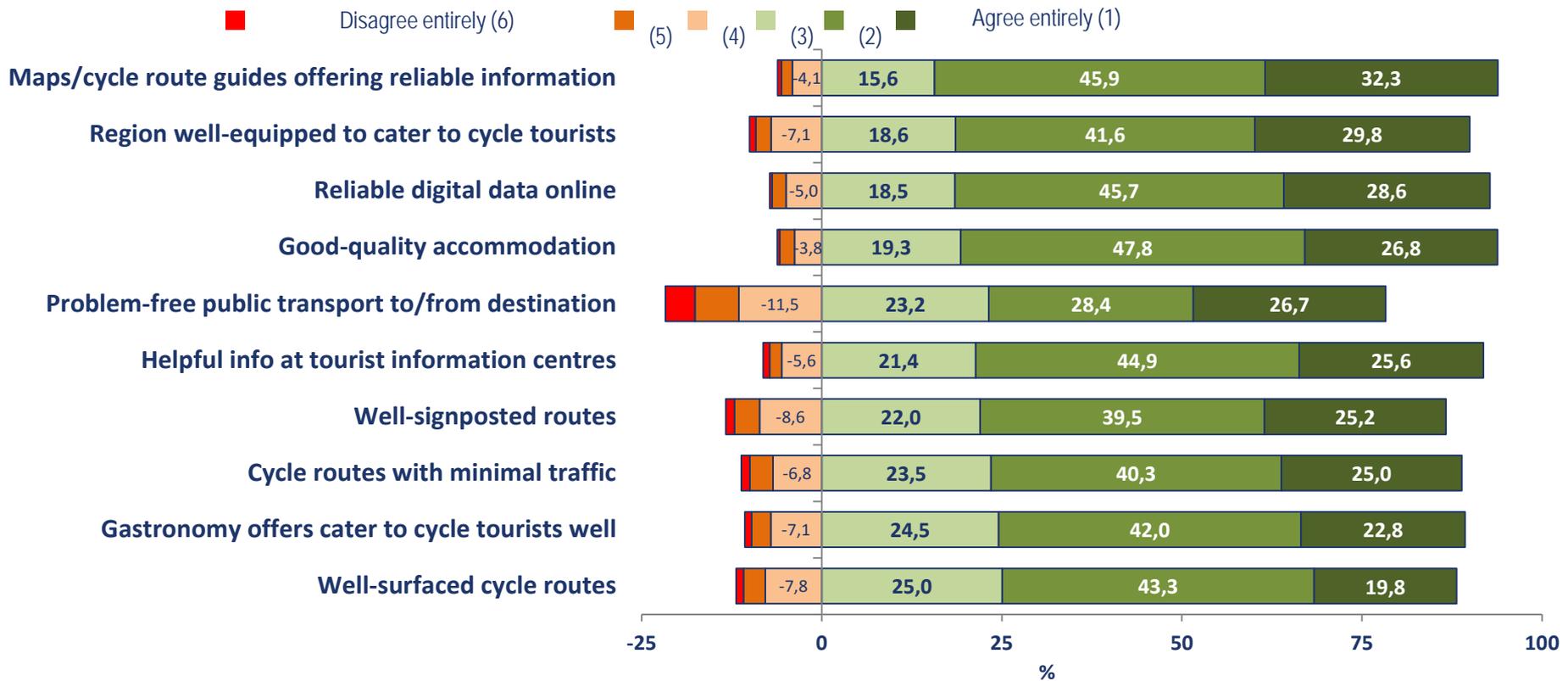
Think of your longest cycling trip. How did you reach your trip starting point? And how did you travel home? (n = 2,149/2,140 unweighted)  
 Source of all German travellers: 2015 Bicycle Travel Analysis – first selected results from the 45<sup>th</sup> bicycle travel analysis at the ITB 2015

# Bicycle carriage in long-distance transport



# Quality of offers

Potential for improvement, particularly when travelling by public transport



Think of your longest cycling trip in 2015, how would you rate the quality of this holiday? (n = 2,106 unweighted)

# ADFC Quality Routes and ADFC Bicycle Travel Regions

Over **11,000 kilometres** → cycled and evaluated

The quality of routes has improved: there are now more 5-star routes and Bicycle Travel Regions.

## 34 ADFC Quality Routes:

4 \*\*\*\*\*-star routes

19 \*\*\*\*-star routes

11 \*\*\*-star routes

## 5 ADFC Bicycle Travel Regions

Popular in other European countries:  
star routes in Austria, Belgium, Denmark,  
Hungary, Luxembourg, Netherlands





## Announcement of new ADFC Quality Routes and ADFC Bicycle Travel Regions at the ITB 2016



Iller Cycle Route  
146 km



Ruhr Valley Cycle  
Route  
230 km



Tauern Cycle Route (A/D)  
268 km



Tauernradweg

4-star ADFC Quality  
Routes



5-star ADFC Quality Routes

Liebliches Taubertal

The classic  
102 km



Drau Cycle Route (A)  
279 km



# ADFC Bicycle Travel Regions



Lake Chiemsee, Chiemgau



Uelzen heathlands



Castle Park Cycle Route and castle grounds in the Allgäu



For the first time in Germany:  
Bicycle Travel Regions  
PLUS 5-star routes announced

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# Route and region ranking for Germany and abroad

# Most popular cycle routes in Germany

The top ten (10 out of 156 long-distance cycle routes named):



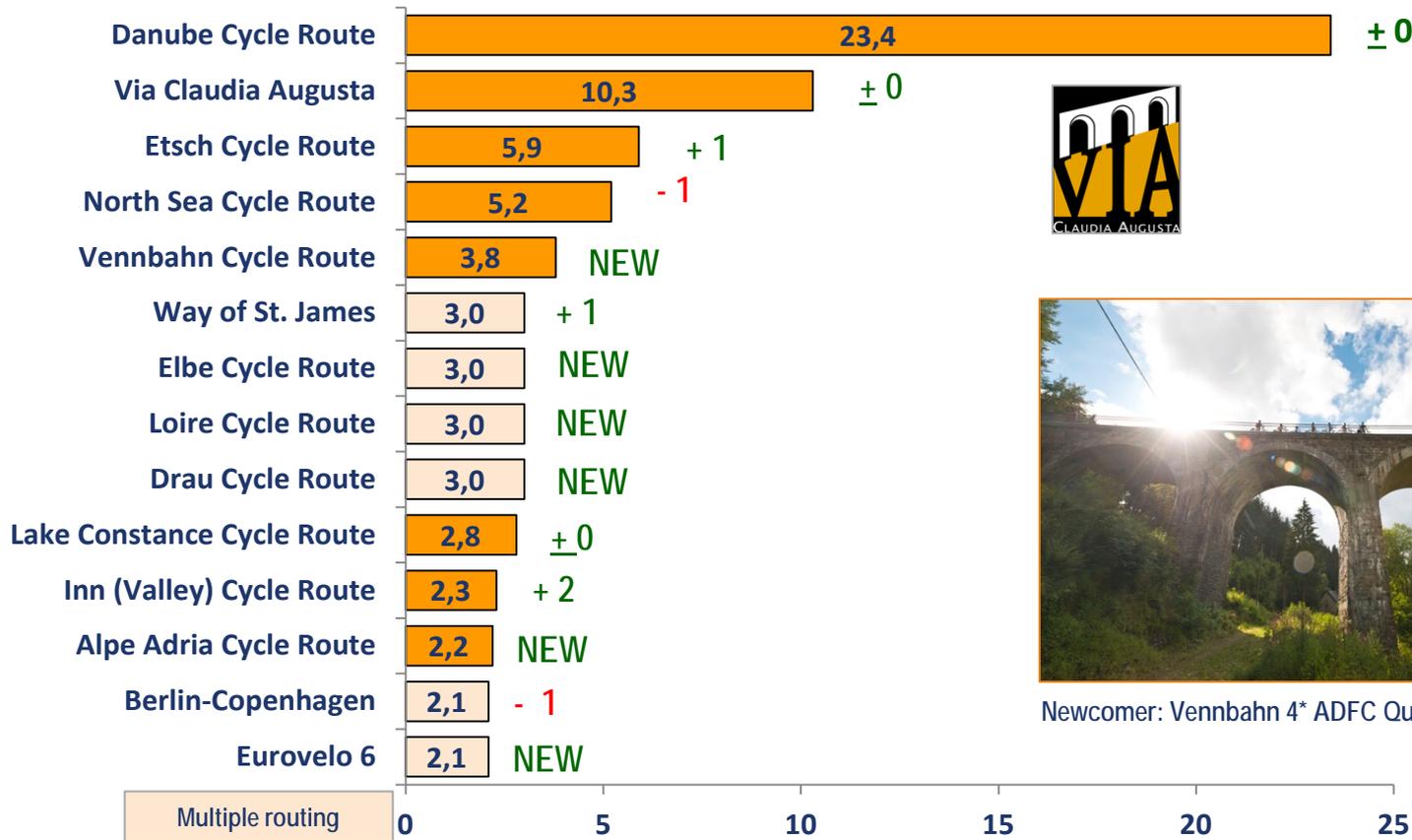
Ranked #1 for the 12<sup>th</sup> time!

What is your favourite long-distance cycle route in Germany? (n = 1,764 unweighted)

As a percentage (%)  
and with the changes compared to the previous year

# Most popular cycle routes abroad

The top ten (10 out of 87 long-distance cycle routes named):



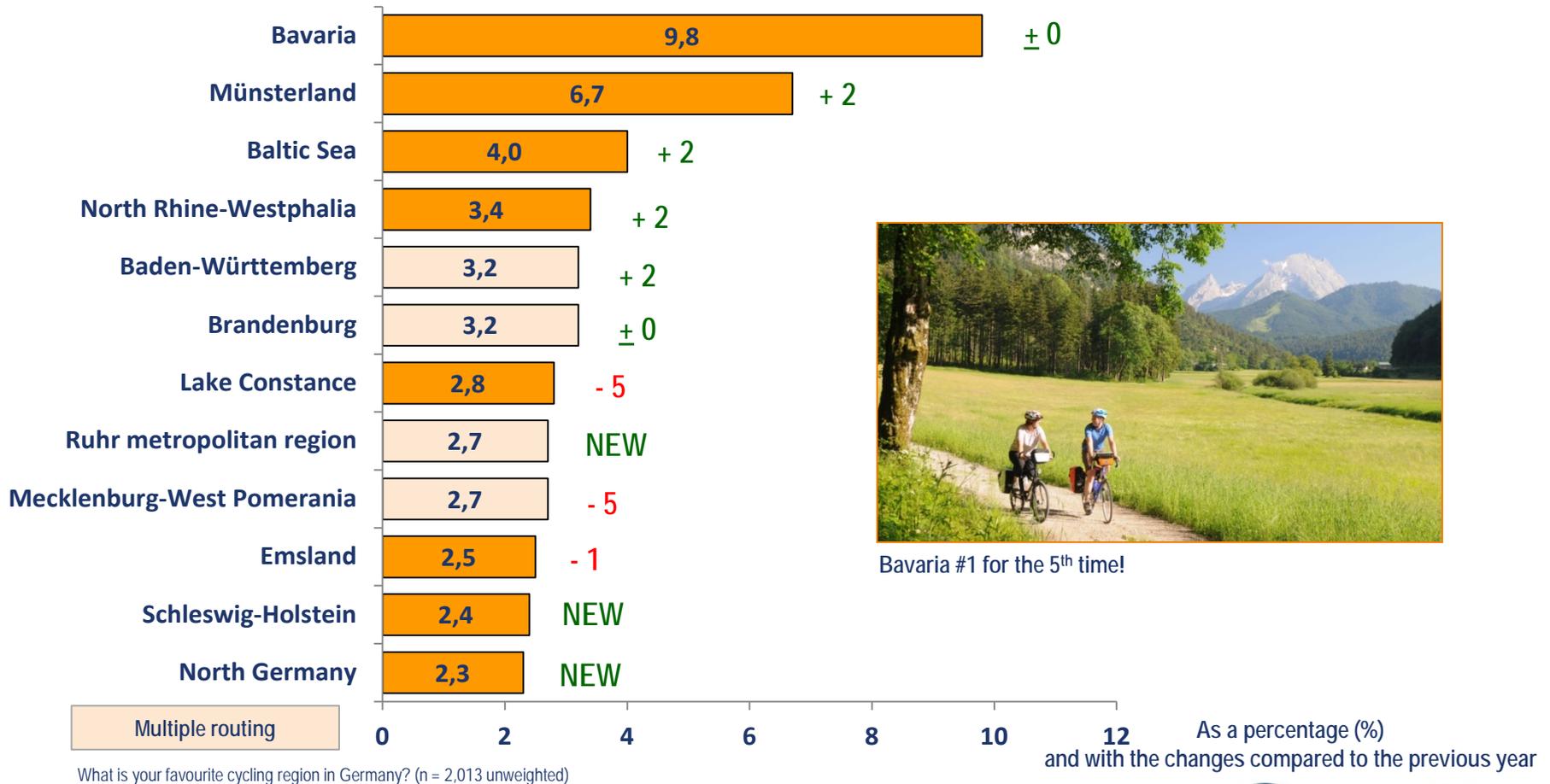
Newcomer: Vennbahn 4\* ADFC Quality Route (D/B/L)

As a percentage (%), with the changes compared to the previous year

What is your favourite long-distance cycle route abroad? (n = 708 unweighted)

# Most popular cycling regions in Germany

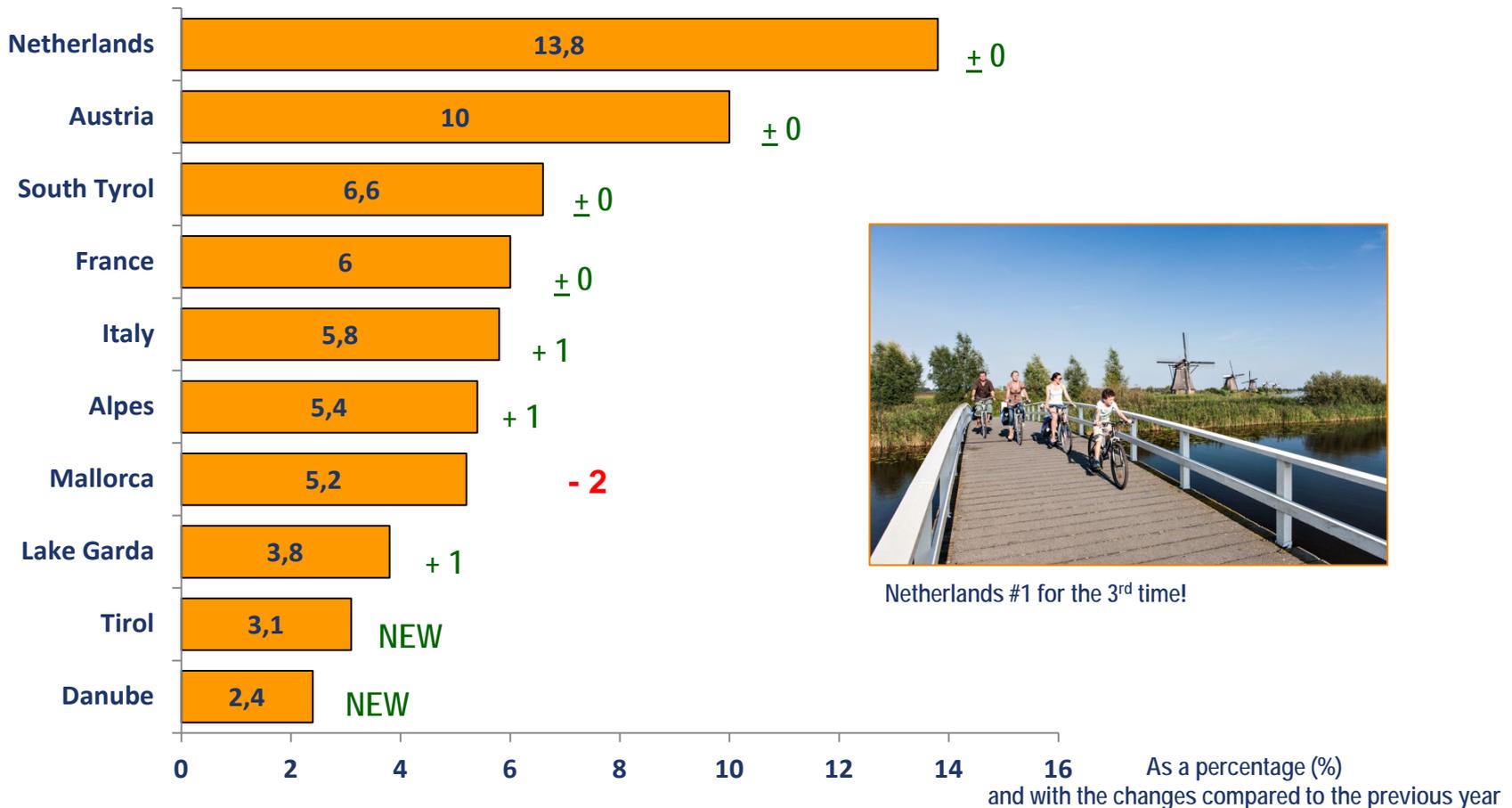
The top ten (10 out of 142 cycling regions named):



Bavaria #1 for the 5<sup>th</sup> time!

# Most popular cycling regions abroad

The top ten (10 out of 114 cycling regions named):

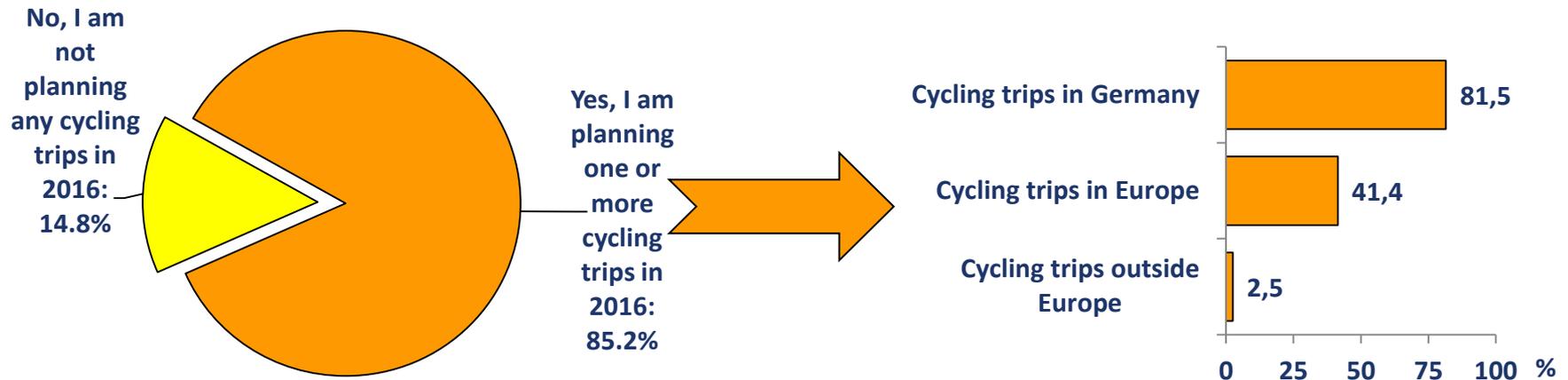


Netherlands #1 for the 3<sup>rd</sup> time!

What is your favourite cycling region abroad? (n = 1,280 unweighted)

# Cycling trip destinations in 2016

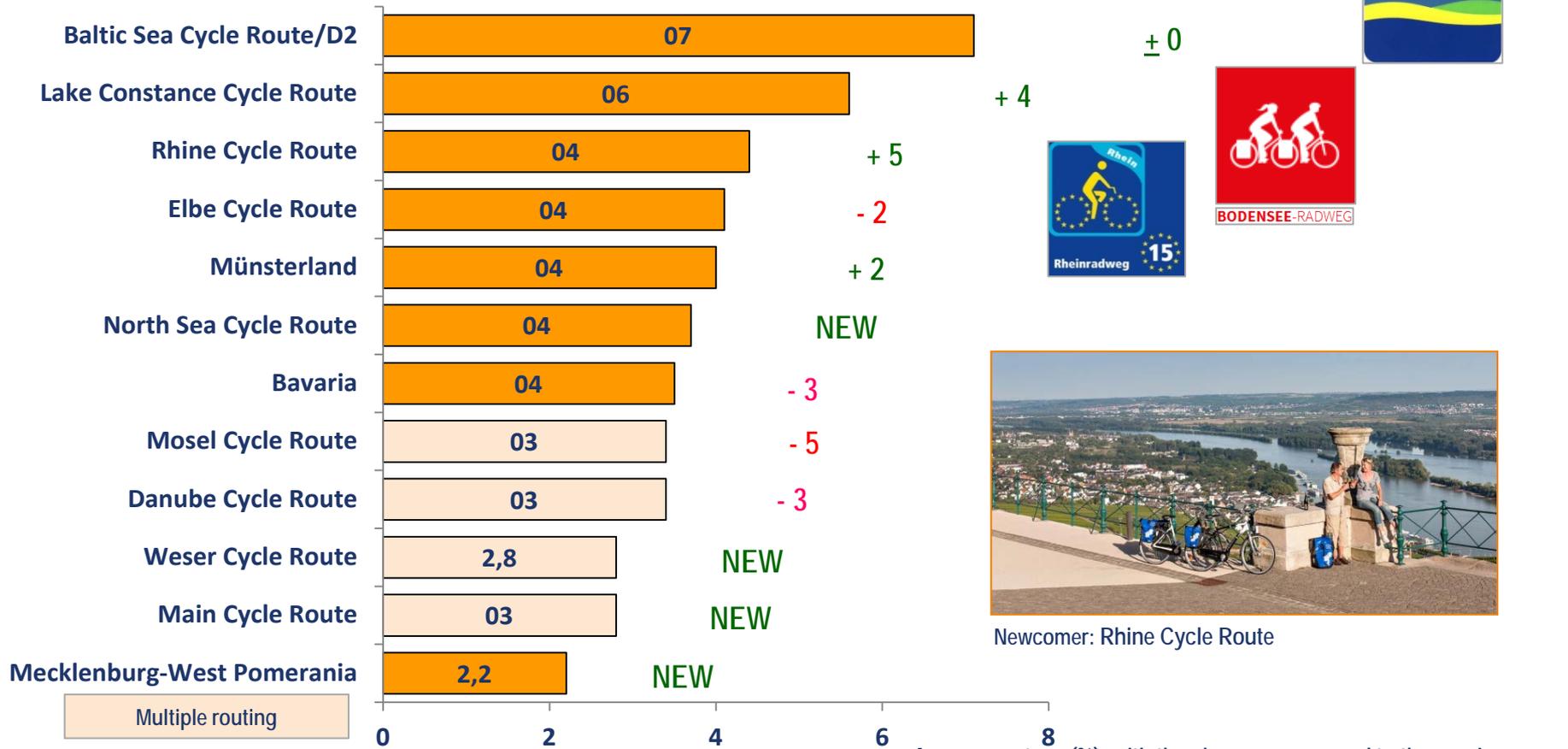
- More than 85% of cycle tourists also plan to complete a cycling trip in 2016.
- Of these, 82% are planning a trip within Germany (+3.5% compared to 2015).
- Travel to destinations outside of Europe will once again barely play a role in 2016.
- Cycle tourism boosts tourism in Germany in general.



Are you planning one or more cycling trips in 2016? If yes, where to? (n = 2,446/2,150 unweighted)

# Cycling trip destinations in Germany in 2016

A total of 251 regions and destinations were named:

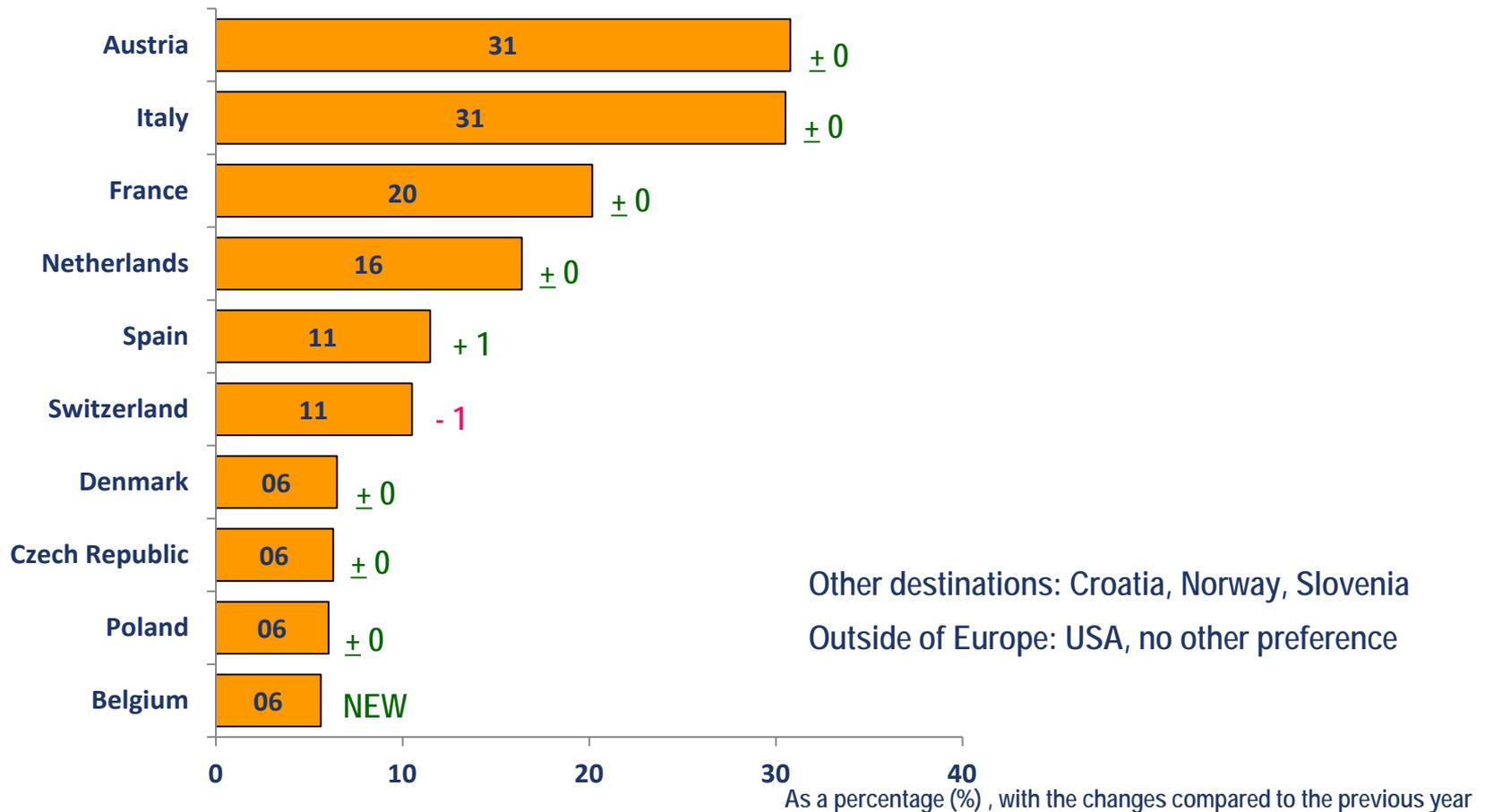


What destination within Germany are you planning for your cycling trips in 2016? (n = 1,713 unweighted)

As a percentage (%), with the changes compared to the previous year

# Cycling trip destinations abroad in 2016

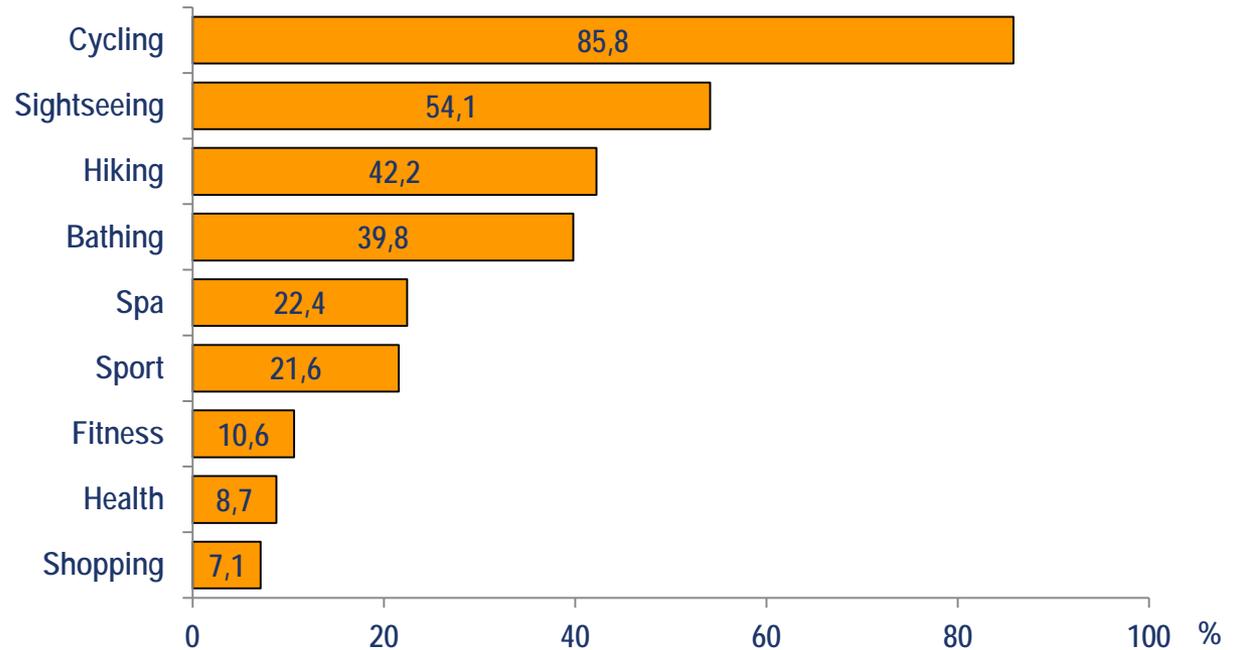
Top ten destinations planned (within Europe):



Which European destinations are you planning for your cycling trips in 2016? (n = 950 unweighted)

# Combining holiday/travel types

- Beside cycling trips, sightseeing tours and cultural visits were also popular.
- Popular combinations: cycling and hiking, cycling and spa visits, cycling and sightseeing
- Combinations of little interest to cycle tourists: fitness, health visits and shopping trips



Which types of holiday did you combine last year? (n = 2,440 unweighted)

# 2016 ADFC bicycle travel analysis

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A huge thanks to our supporters:

- The bicycle tourists surveyed
- **T.I.P. BIEHL & PARTNER** – Markt- und Tourismusforschung
- German National Tourist Board (DZT)
- Deutsche Bahn AG
- MeinFernbus FlixBus
- **VAUDE Sport GmbH** (sponsorship: prize for participation in the 2016 Bicycle Travel Analysis)

The full version of the 2016 ADFC bicycle travel analysis can be viewed online at [www.adfc.de/14798](http://www.adfc.de/14798) (in German only).