

# 2017 ADFC-Travelbike Bicycle Travel Analysis

## Travel volumes

- **Cycle tourism increased by 16%:** alone in 2016, 7.6% of Germany or 5.2 million people (aged over 18 years) completed a cycling trip with at least three overnight stays (2015: 4.5 million). Of these 5.2 million Germans, 72% completed **one** cycling trip and 28% **more than one** cycling trip with at least three overnight stays.
- **Day trips:** in 2016, around 29% of Germans (so around 20 million people) completed day trips during which the main purpose was to cycle (in relation to the entire populated aged over 18 years = 68.9 million people). On average, these 20 million people completed 7.7 such day trips. Overall, there were approx. 150 million day trips during which the main purpose was to cycle. This corresponds to 6% of all day trips completed by Germans. (*Number of day trips: dwif 2013*)
- **Cycle tourism boosts tourism in Germany:** 84% of cycle tourists plan to also complete one or more cycling trips in 2017. 61% of them wish to travel within Germany; 36% within Europe and 3% outside of Europe. 20% have not yet decided on their destination. In comparison: 30% of all Germans are planning a holiday in Germany in 2017. (*FUR Travel Analysis – 2017 Holiday Travel Trends*)
- **For foreign visitors to Germany,** cycling and mountain biking are the second most popular (sporting) activities after hiking. The top three countries of origin of foreign cycle tourists are the Netherlands, Switzerland and Belgium. (*DZT Quality Monitor – Tourism in Germany between May 2015 and April 2016*)

## Travel behaviour

- **Age:** the average age of cycle tourists is 48 years; every second cycle tourist is aged between 45 and 65 years.
- **Travel types:** cycling trips are mainly individual trips. 88% of cycle tourists organise their trip for themselves. Around 7% book their trip entirely through a trip/tour operator. 5% take advantage of selected services offered by a trip/tour operator.
- The **preferred tour type** among 74% of cycle tourists are point-to-point tours with changing accommodation. Around 23% explore the region by bike during circular tours from fixed accommodation.
- **Travel companions:** cycle tourists are mainly accompanied by their partner (54%) or friends/acquaintances (34%). The proportion of cycle tourists travelling alone is high (18%). 11% of cycle tourists travel with children/youths.
- **Travel planning:** the information behaviour barely changed compared to 2015. 90% of cycle tourists still use the internet to prepare for their trip. For 55% of respondents, classic cycling maps serve as a source of information, followed by cycling trip guides (40%).
- **On the go:** for 79% of respondents, the most important source of information and orientation during cycling trips is signposting. 64% use cycling maps. Almost every second cycle tourist uses a smartphone to obtain information while on the go (48%), one third (32%) use a GPS device and 30% use local tourist organisations.
- **Bicycle travel:** 93% of cycle tourists use their own bicycle during their holiday. Trekking bikes are most commonly used (72%). 15% use a mountain bike and 5% opt for a racing bike. At 13%, the proportion of electric bikes has once again increased (2015: 11%). The proportion of hire bikes decreased slightly to 7% (2015: 8%).
- **Travel to and from the cycling destination:** cycle tourism is one of the most environmentally-friendly forms of travel. Around one third of cycle tourists travel to/from their cycling destination by train (33.8% and 35.6%). The proportion of cycle tourists who choose to travel by car lies at 35%. Just 5% of cycle tourists travel by plane and 2% by long-distance bus. 21% of cycle tourists start their cycling trip directly from their home by bicycle.

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- **Combinations:** other holiday activities were also surveyed in the Bicycle Travel Analysis. Beside cycling trips, primarily city breaks (46%), hiking trips (39%) and trips to the seaside (30%) are popular.
- **Everyday transport:** 87% of cycle tourists also use their bike in their everyday lives. For 30% of respondents, cycling while on holiday led them to cycle more in their everyday lives.

### Most popular long-distance cycle routes and cycling regions

- The Elbe Cycle Route has been named the **most popular long-distance cycle route in Germany** for the thirteenth time. Behind this by a clear margin, the Weser Cycle Route and the Ruhr Valley Cycle Route are placed joint second. The Rhine Cycle Route rose three places in the ranking to take third place. The Danube Cycle Route and Baltic Sea Coast Cycle Route were joint fourth. The Main Cycle Route also moved up three places to rank fifth. The Mosel Cycle Route, Lake Constance Cycle Route and Lake Constance-Königssee Cycle Route are also among the top ten. The Altmühl Valley Cycle Route and Oder-Neiße Cycle Route are the final two routes in the top ten.
- Bavaria is the **most popular German bicycle travel region** for the sixth time; Münsterland ranked second. The Lake Constance region went up three places to rank third, closely followed by the Baltic Sea region, Baden-Württemberg and the Ruhr Region, which ranked joint fourth. The Black Forest, Eifel, Mosel, Franconia and state of Lower Saxony also featured among the top ten. (*Open survey, hence regions, areas and federal states also possible.*)
- The **most popular long-distance cycle route abroad** with a clear lead is once again the Danube Cycle Route (Passau–Vienna), followed by the Via Claudia Augusta. The North Sea Cycle Route (now ranked third) and Etsch Cycle Route (now ranked fourth) switched places. New in the top ten are the Rhine Cycle Route (eighth) and the Baltic Sea Coast Cycle Route (tenth). The Berlin-Copenhagen Cycle Route moved up three places to rank seventh. The Elbe Cycle Route, Loire Cycle and Alpe Adria Cycle Route are almost among the top ten.
- **The most popular bicycle travel region abroad** remains the Netherlands. Southern Tyrol (now ranked second) and Austria (now ranked third) have switched places. The Alps, Mallorca, France, Lake Garda and Italy also feature among the top ten. Tuscany, Switzerland, Denmark and Alsace have joined the top ten. (*Open survey, hence regions, areas and states also possible*)
- **In 2017**, cycling trips are above all planned along the Elbe Cycle Route and Baltic Sea Coast Cycle Route. The Mosel Cycle Route (ranked third) and the Weser Cycle Route (ranked fourth) both moved up five places in the ranking. They are followed by cycling trips on the Lake Constance Cycle Route, Rhine Cycle Route and, new to the top ten, the Ruhr Valley Cycle Route. Plans are under way for cycling trips on the North Sea Cycle Route, Main Cycle Route, Danube Cycle Route and in Bavaria. As in the previous year, particularly Austria, Italy and France were popular overseas cycling trip destinations. Long-haul travel barely played a role.

### Travel to/from the destination by rail and bus

- **Long-distance rail travel:** in 2016, Deutsche Bahn transported 327,694 bicycles (2015: 315,104), an increase of around 4%. (*DB Fernverkehr AG*)
- **International rail travel (DB International):** there was a 14% increase in cross-border bicycle carriage abroad trains. In 2016, 59,844 bicycles were transported (2015: 52,379 bicycles). (*DB Fernverkehr AG*)
- **Night-time rail travel (DB City Night Line):** in 2016, the number of bicycles transported aboard night trains decreased by 25% to almost 22,220 bicycles (2015: 29,700 bicycles). (*DB Fernverkehr AG*)
- **Long-distance bus travel:** the number of bicycles transported aboard long-distance buses is expected to increase further. FlixBus transported around 85,000 bicycles in 2016 (2015: 65,000) aboard 1,000 buses in 2016 (start of 2015: 500) on 120,000 connections

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(45,000 daily). A plus of 93% compared to 2014 with around 44,000 bicycles. Cross-border bicycle carriage is possible in 16 European countries. Around 75% of bus lines are equipped with bicycle racks. The top three most popular destinations among FlixBus travellers were Austria, Czech Republic and Switzerland. The three most popular German cities were Berlin, Munich and Hamburg. (*FlixBus*)

### The ADFC and cycle tourism

- “**Discover Germany by Bike**” remains the most successful marketing campaign for German cycle tourism and provides inspiration for future cycling trips. The ADFC provides information on more than 65 long-distance cycle routes and bicycle travel regions in addition to 100 further routes in overviews through a combination of brochures, the new [www.deutschland-per-rad.de](http://www.deutschland-per-rad.de) website and accompanying marketing activities. The German National Tourist Board (DZT) advertises Germany as a travel region abroad on [www.germany.travel](http://www.germany.travel).
- **Bett+Bike:** the ADFC has awarded bicycle-friendly hosts the Bett+Bike seal since 1995. More than 5,800 hosts in Germany offer facilities specifically for cycle tourists. The ADFC Bett+Bike network is the most successful marketing cooperation for hosts in the German cycle tourism. More than 500 host businesses in Belgium, Denmark, Luxembourg and Austria have also been awarded the seal. Further European countries are interested. All hosts are listed in the Bett+Bike app and the new [www.bettundbike.de](http://www.bettundbike.de) platform.
- **ADFC Quality Routes and Bicycle Travel Regions:** the ADFC has awarded a quality seal to long-distance cycle routes since 2006 and to bicycle travel regions since 2013. A total of 37 long-distance cycle routes and five bicycle travel regions have been awarded three to five stars (runtime: three years). Around 12,000 kilometres have been checked by ADFC experts, kilometre by kilometre. There are currently five ADFC Quality Routes and one ADFC Bicycle Travel Region in Austria. Ten further star routes cross international borders into the Netherlands, Belgium, Luxembourg, France, Hungary and Switzerland.

Routes with ... / certified region	5 stars	4 stars	3 stars	Region	Total
Total routes/regions	4	25	8	5	37/5
Total kilometres	728	6,892	2,056	2,205	9,676/2,205

At the ITB 2017, twelve ADFC Quality Routes were awarded a total of 45 stars. The Saar Cycle Route, Allgäu Cycle Loop, Lahn Valley Cycle Route, Southern Black Forest Cycle Route, Glan-Blies Cycle Route, DonauTÄLER, Weser Cycle Route and German Danube Cycle Route were all awarded four stars. The Töddenland Cycle Route, Paderborner Land Cycle Route and RurUfer Cycle Route were awarded three stars. Among the top ten in the Bicycle Travel Analysis in the categories: four ADFC Quality Routes featured among the most popular routes, most travelled routes in 2016 and routes planned for 2017.

- The **ADFC Tour Portal** makes a routing-capable network covering a total of 452,027 km in length available for tour planning. (*Last updated: March 2017*)
- The **ADFC Dachgeber** (literally “roof giver”) was published for the twenty-ninth time in 2017. The directory of private accommodation offered according to the principle of reciprocity contains 3,255 addresses and a total of 17,033 free accommodation offers.
- **Radurlaub brochure:** the ADFC presented its “Radurlaub” (cycling holiday) brochure for 2017 featuring 118 ideas for holidays in Germany, Europe and worldwide from 44 reputable cycling trip organisers. It is also online at [www.radurlaub-online.de](http://www.radurlaub-online.de).
- **ADFC-led cycling tours:** the ADFC is the largest provider of guided cycling tours in the world. In 2016, 2,300 tour guides led 130,000 participants on 11,000 ADFC cycling tours covering 6.7 million kilometres – 167 times the earth’s circumference!

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### Trends

- **The German source market:** cycle tourists are highly coveted in other European countries. A growing number of countries are attracting cycle tourists with ADFC certification for their routes (ADFC Quality Routes, ADFC Bicycle Travel Regions, Bett+Bike, e.g. in Austria, Hungary, Belgium and Denmark).
- **Coordination:** comprehensive coordination activities are worthwhile: major long-distance cycle routes such as the Weser Cycle Route, Danube Cycle Route and Lake Constance Cycle Route have been awarded 4 stars by the ADFC.
- **Notable climbers** among the most popular long-distance cycle routes are the Rhine Cycle Route, Main Cycle Route and Altmühl Valley Cycle Route. The Saale Cycle Route was also one of the most popular routes in 2016. The Berlin-Copenhagen Cycle Route (in Denmark) and Eisack Valley Cycle Route/Brenner are the main climbers abroad.
- **Proportion of women:** the proportion of women increased from 36% to 42%.
- **Main motives:** cycle tourists named their main motives for their choice of travel types as an opportunity to experience nature, actively do sport, health and above all relaxation.
- **E-bike usage:** the proportion of cycle tourists using pedelecs/e-bikes increased compared to 2015 (from 11% to 13%) and therefore includes further new target groups and specifically older female cyclists.
- **Cycling trip destinations in Germany in greater demand:** demand for travel destinations in Germany (61%) was once again high in the travel planning for 2017. 20% of respondents have not yet decided on their cycling trip destination.
- **Smart biking and classic orientation:** the use of smartphones as a source of orientation and information during cycling tours lay at around 50% – 48% in 2016 and 55% in 2015. One third of cycle tourists travel with a GPS device. Despite the increasing digitalisation, classic orientation aids such as maps and cycling trip guides remain important. Signposting is most important when on the go.
- **Rivers and mountains:** routes along rivers and coastlines remain the most popular and most cycled cycle routes. However, more topographically challenging cycle routes in the Alps are growing in popularity. The Via Claudia Augusta long-distance cycle route, Eisack Valley Cycle Route/Brenner (new in the ranking in 2016) and Alpe Adria Cycle Route are among the most travelled and most popular long-distance cycle routes. The Alp crossing is very popular.
- **Trip combinations:** city breaks are also extremely popular among cycle tourists. Indication for city marketing agencies to increasingly offer trip combinations.

### From the routes and regions

- **Weser Cycle Route** as an economic driver for the region: total value added of 7.95 million euros per year was generated by cycle tourists in 2015. (*Weser Cycle Route information centre*)
- **Sauerland:** the new study confirms the economic factor of cycle tourism. 9.3 million day trips were completed by cyclists in 2015, which contributed to the gross revenue of the regional value added and helped to secure 2,500 jobs. (*Sauerland-Radwelt e. V./dwif e. V.*)
- **Ruhr Valley Cycle Route:** since the route's opening in 2006, more than 6.5 million cycle tourists and day trippers have travelled the route. The long-distance cycle route was (one of) the reasons for private tourism investments totalling 12–14 million euros (e.g. hotel industry, gastronomy, retail). (*Ruhr Tourismus GmbH/ RTG*)
- **Via Claudia Augusta:** 40,000 cycle tourists cycled the long-distance cycle route in 2016. The route hotline informed cycle tourists from 48 countries. (*Via Claudia Augusta EWIV/GEIE/EEIG Transnational*)
- **Danube Cycle Route/Austria** (awarded four stars by the ADFC): 682,000 cyclists travelled the route in 2016 (increase of 6.4% compared to the previous year) of which 58,000 covered the stretch between Passau and Vienna. 44% of the cycle tourists were from Germany and 18% from Austria. 68% organised their cycling trip themselves. (*ARGE Donau Österreich*)

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- A growing number of regions are reporting that the increase in cycle tourism also means the season starts earlier and runs for longer (e.g. Uelzen Heideregion).

**Sources:** Where information was obtained from other providers, the source is indicated in brackets. All other figures originate from the 2017 ADFC-Travelbike Bicycle Travel and T.I.P. Biehl & Partner as well as the ADFC. The 2017 Bicycle Travel Analysis along with full and versions of the presentation are available online at [www.adfc.de/radreiseanalyse](http://www.adfc.de/radreiseanalyse).

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