



ADFC-Radreiseanalyse

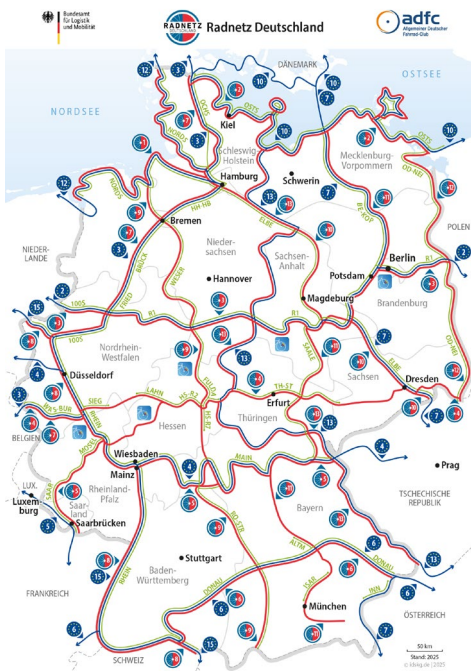
2025 ADFC Bicycle Travel Analysis

Addressing challenges, unlocking potential



The ADFC and cycle tourism

Interest representation



Focus areas



Products and services



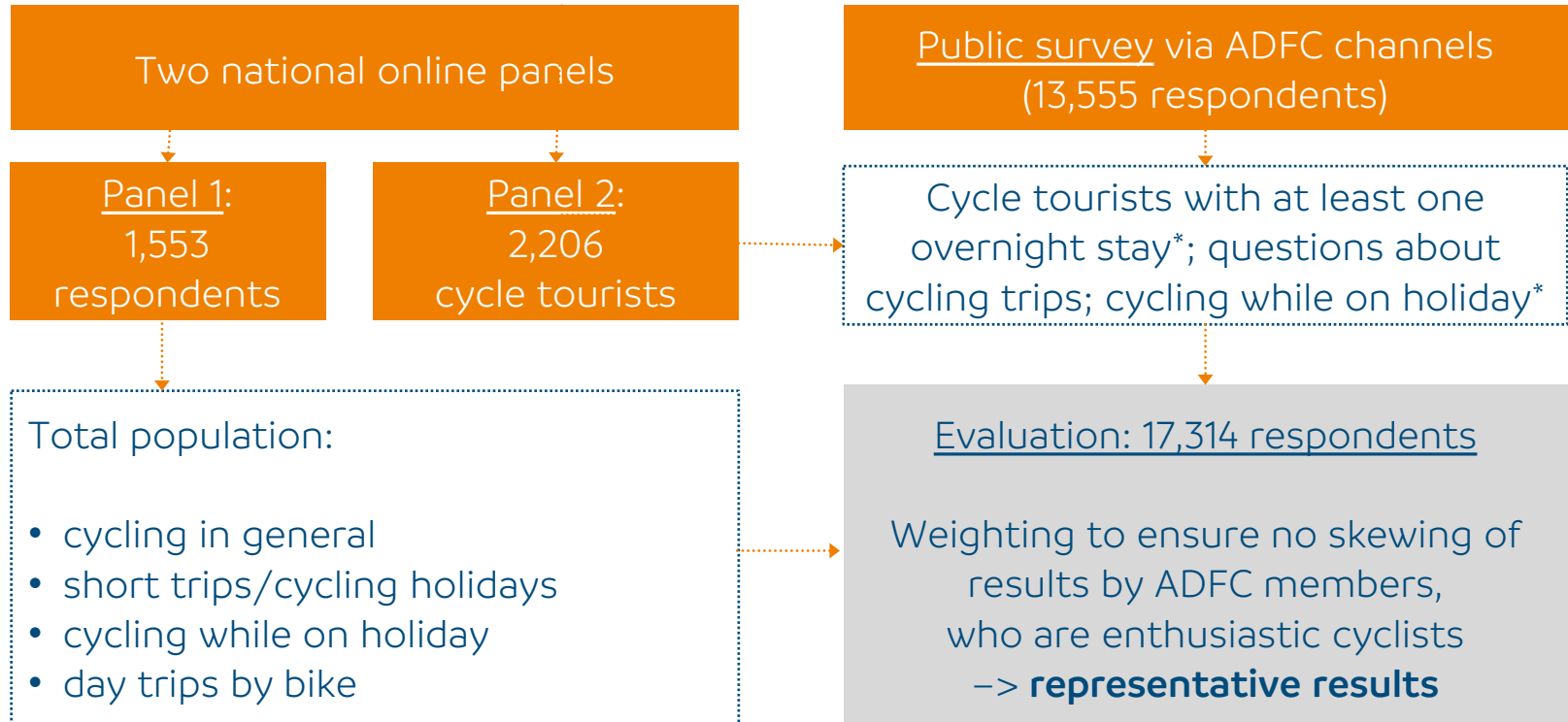
Overview

1. Methodology and overview
2. Cycling while on holiday
3. Day trips
4. Cycle tourism
5. Awards
6. Travel destinations
7. Conclusion



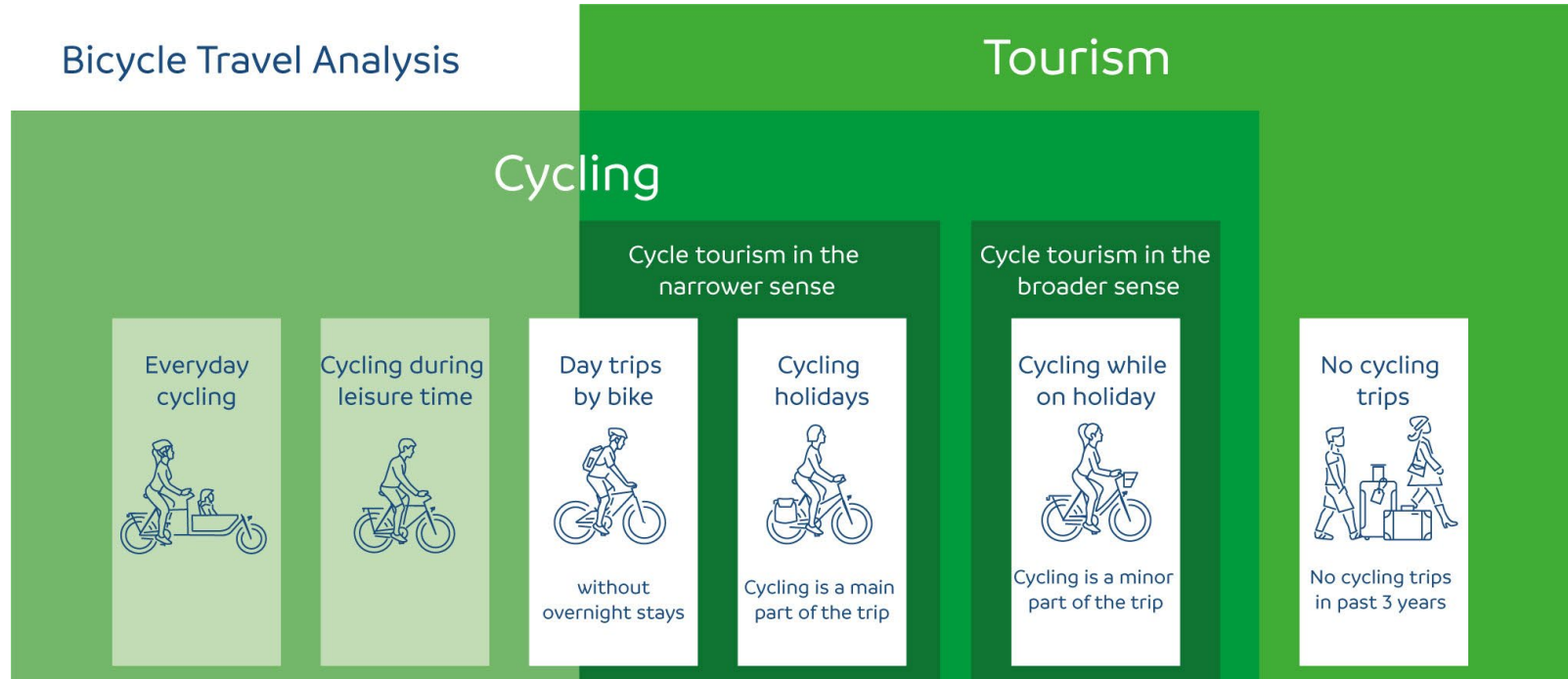
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Methodology



Survey of residents of Germany aged 18+ | New: survey conducted every two years

Segment overview



Source: Illustration by the ADFC based on Dreyer, A., Miglbauer, E., & Mühlnickel, R. (Eds.). (2012). *Radtourismus: Entwicklungen, Potentiale, Perspektiven*. Oldenbourg Verlag.

Cycling while on holiday in 2025



Cycling is a minor part of the trip



©ADFC/april agentur



Cycling while on holiday



Reasons people cycled while on holiday



Reference group: People who cycled while on holiday (at least one trip in 2023/24/25); n = 4,004 (multiple answers possible) | Question: What did you use your bicycle for while on holiday?

Flexible options, easily accessible



44.7%

used an e-bike

37.4%

hired a bike

Top 3 reasons

1. 65.6% to see more of a place and its people
2. 50.4% to be active while on holiday
3. 37.9% to do something for their health

Reference group (rental bikes and e-bikes): People who cycled while on holiday in 2025; n = 2,889

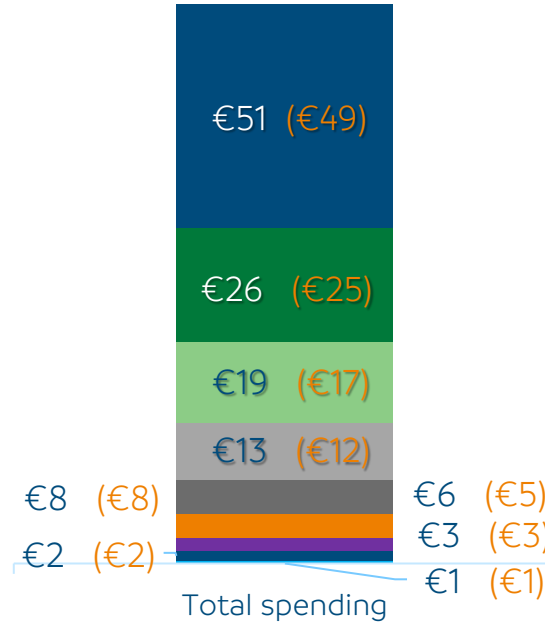
Reference group: People who cycled while on holiday (at least one trip in 2023/24/25); n = 4,004 (multiple answers possible)

Daily spending while cycling on holiday



Extrapolated total spending: €17–19 billion

Total: €128 (€123)



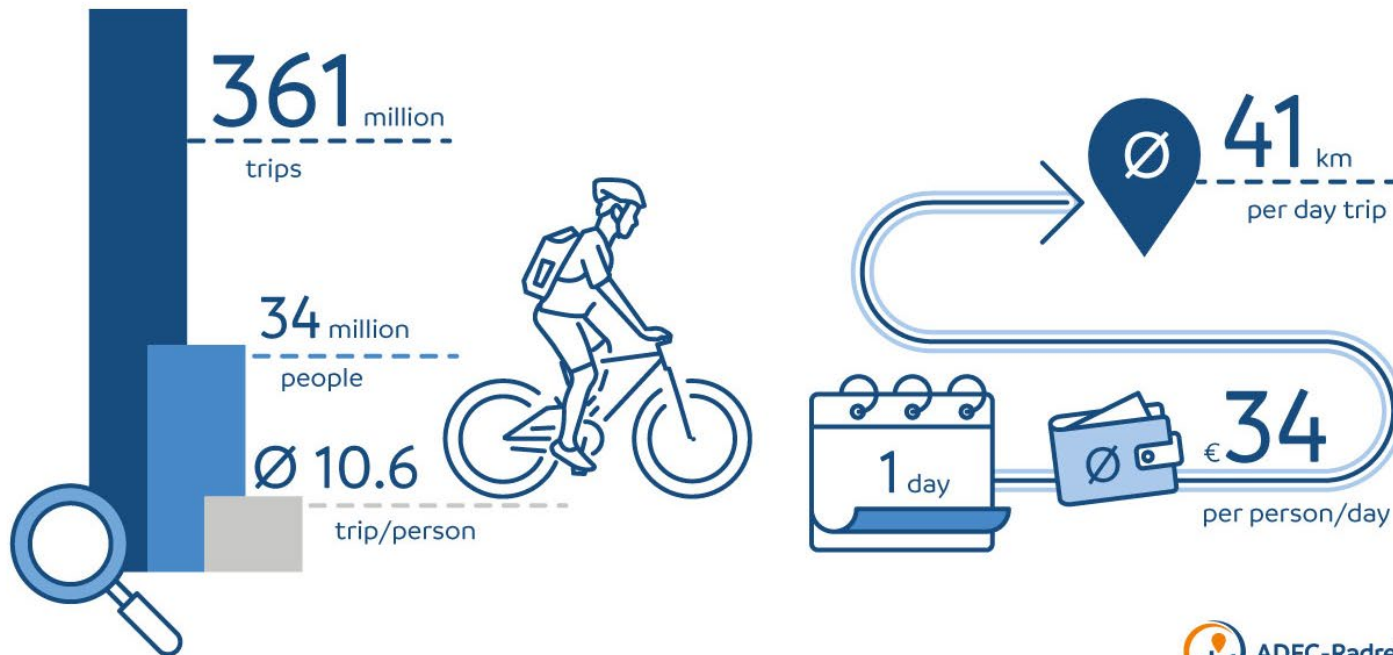
- Accommodation
- Gastronomy
- Travel to/from destination (proportionate)
- Food/daily necessities
- Admission fees and tourism Services
- Products for non-daily use
- Local transport
- Hire costs

Question: How much did you spend on average (per day and person)? | Reference group: People who cycled while on holiday in 2025; n = 2,889 | Figures in brackets: Spending in 2023

Cycling day trips in 2025



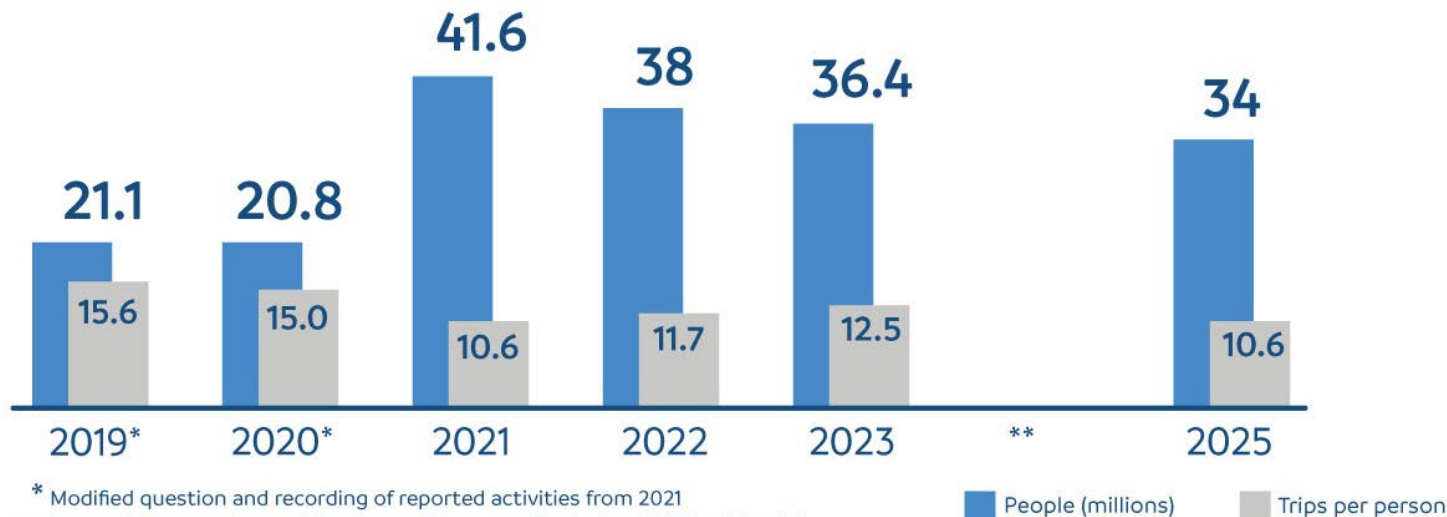
Cycling trips during leisure time (not while on holiday) with no overnight stays



Development of cycling day trips (2019–2025)



Some people who discovered day trips by bike during the Covid-19 pandemic have remained true to their newfound hobby.



* Modified question and recording of reported activities from 2021

** Survey frequency changed from annual (up to and including 2023) to biennial

■ People (millions)

■ Trips per person



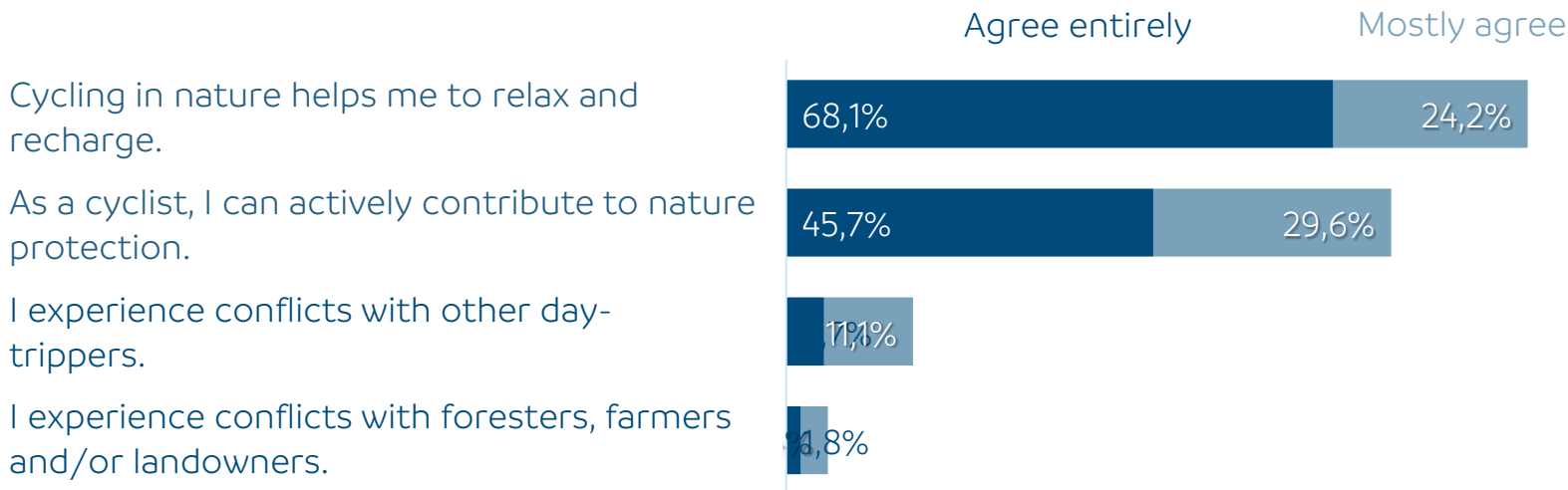
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Experiencing nature during cycling day trips



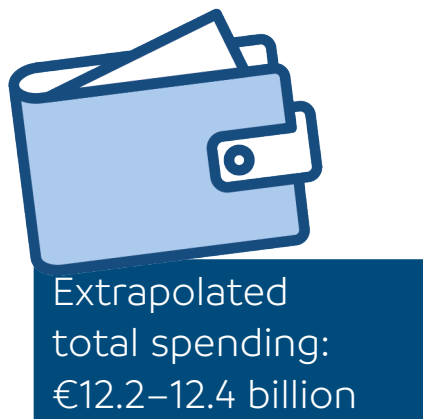
New

Mostly harmonious and above all restful

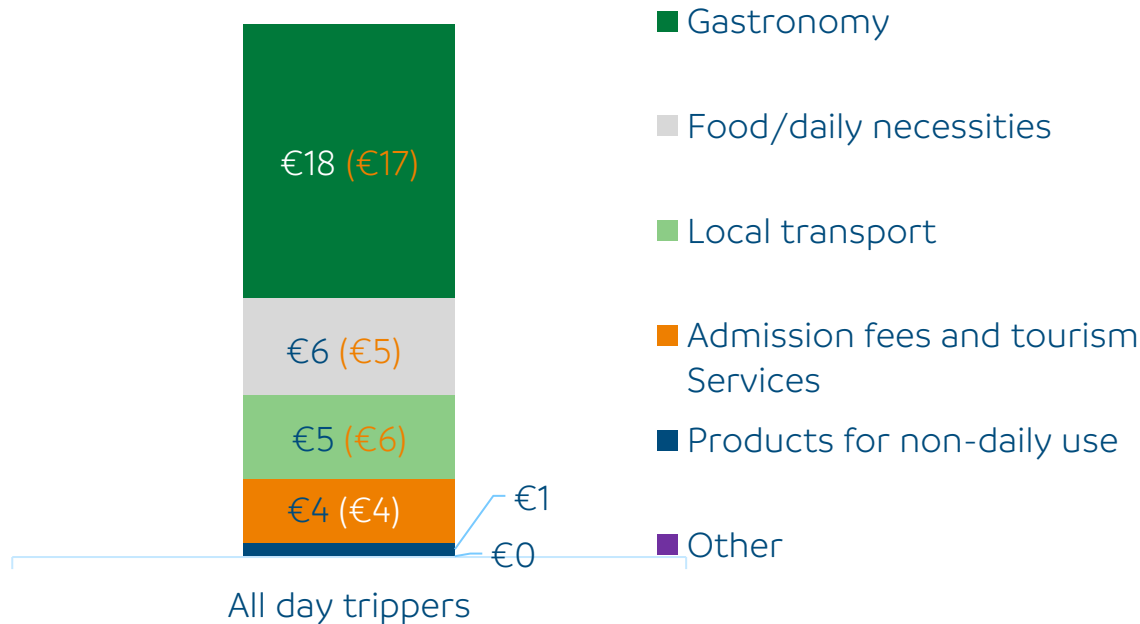


Reference group: Day trippers in 2025; n = 14,359 (multiple answers possible) | Question: To what extent do you agree with the following statements? Please rate on a scale of 1 (agree entirely) to 5 (disagree entirely).

Spending during day trips



Total: €34 (€32)

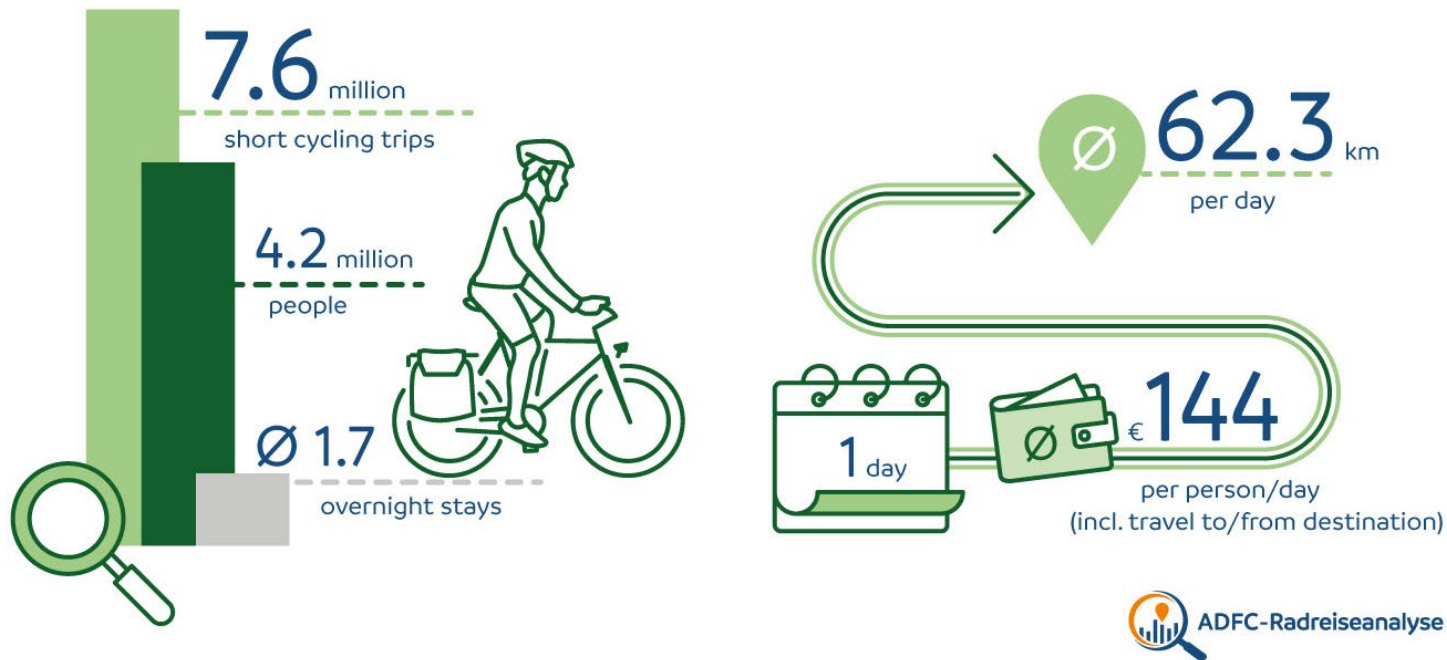


Question: How much money did you spend on average (per person and trip) during your day trips by bike?
Reference group: Day trippers in 2023; n = 11,506 | Figures in brackets: spending in 2023

Short cycling trips in 2025



Cycling is a main part of the trip



Cycling trips with ≥ 3 nights in 2025




Cycling is a main part of the trip





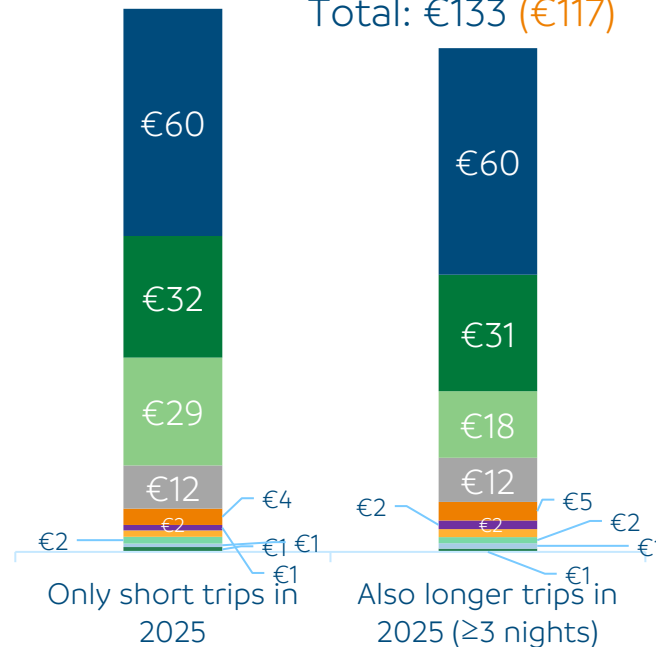
Daily spending per cycle tourist



Extrapolated total spending: €9.5–10.4 billion

Total: €144 (€130)

Total: €133 (€117)



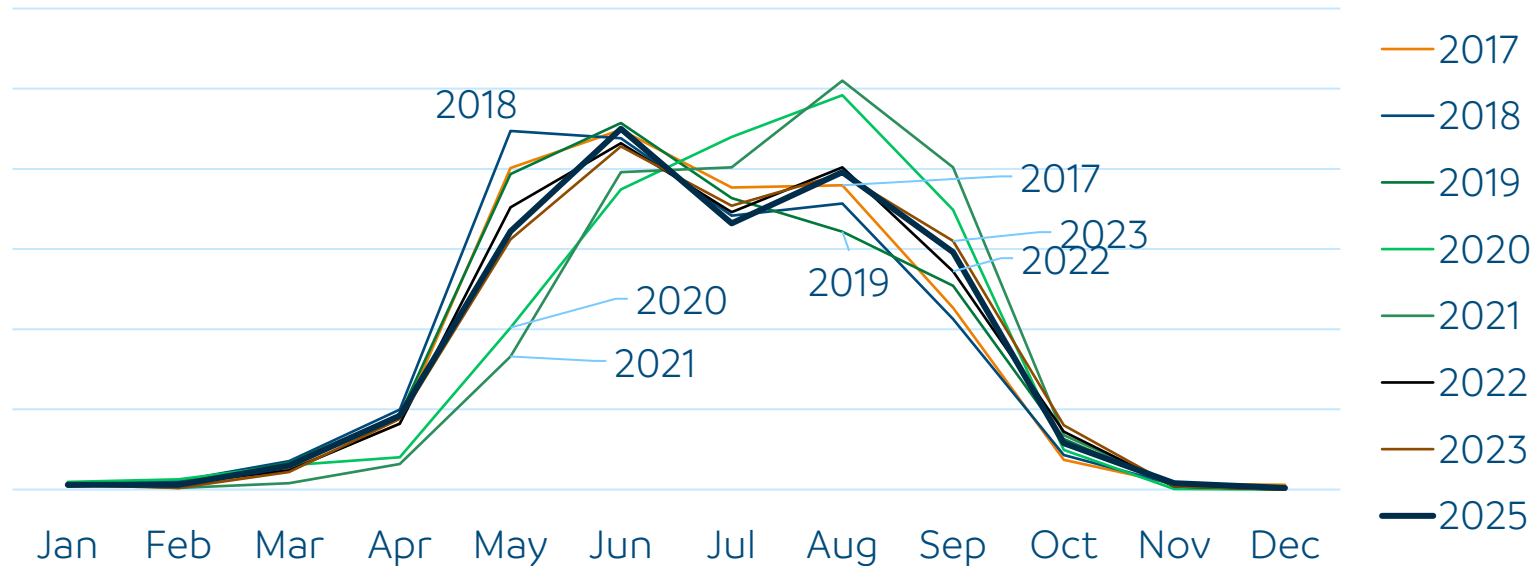
- Accommodation
- Gastronomy
- Travel to/from destination (proportionate)
- Food/daily necessities
- Admission fees and tourism Services
- Spare bike parts/bike repairs
- Products for non-daily use
- Other
- Local transport

Question: How much did you spend on average? (daily spending (incl. travel to/from destination, proportionate per day)) | Reference group: Only cycle tourists in 2025; n = 7,808 | Figures in brackets: spending in 2023



Month of travel (2017–2025)

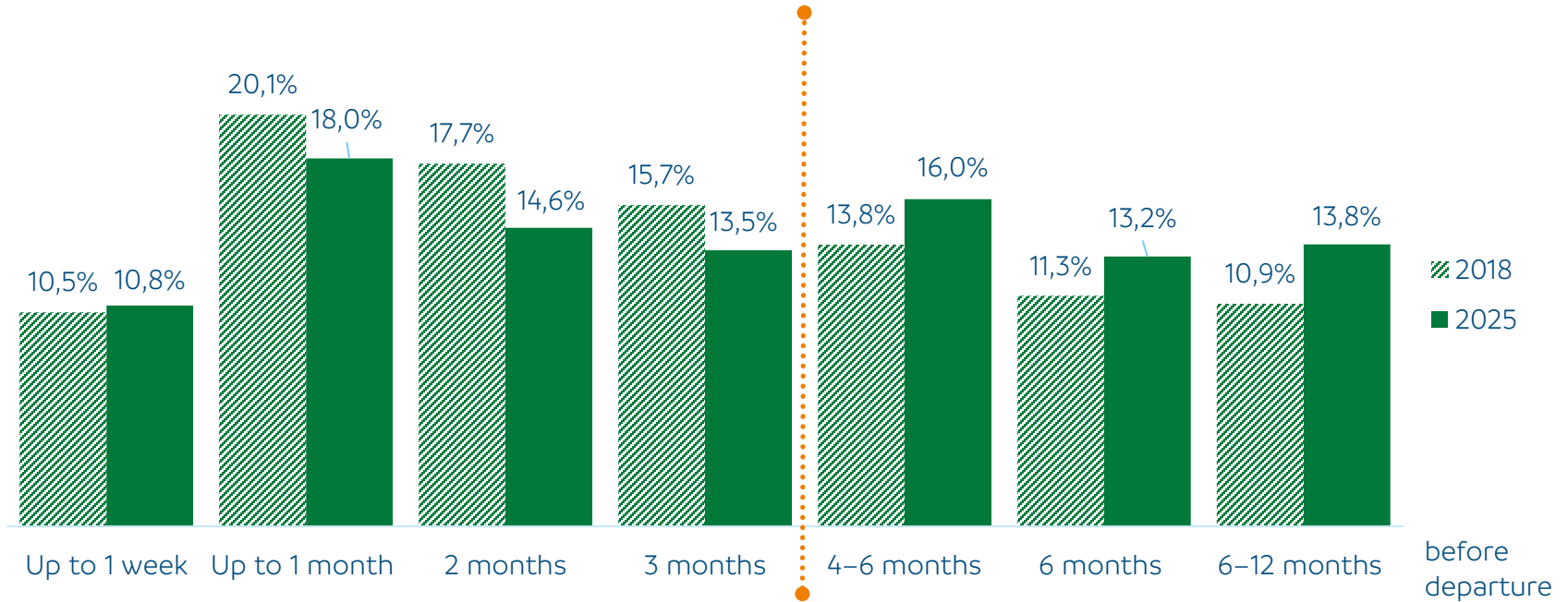
The month in which cycle tourists went on cycling trips remains largely unchanged. July and August were already more popular than June back in 2018.



Reference group: Only cycle tourists in the respective year | Question: In which month did you start this cycling trip?

Decision on destination (2018 vs. 2025)

Travel destinations were decided even further in advance.



Reference group: Only cycle tourists in the respective year

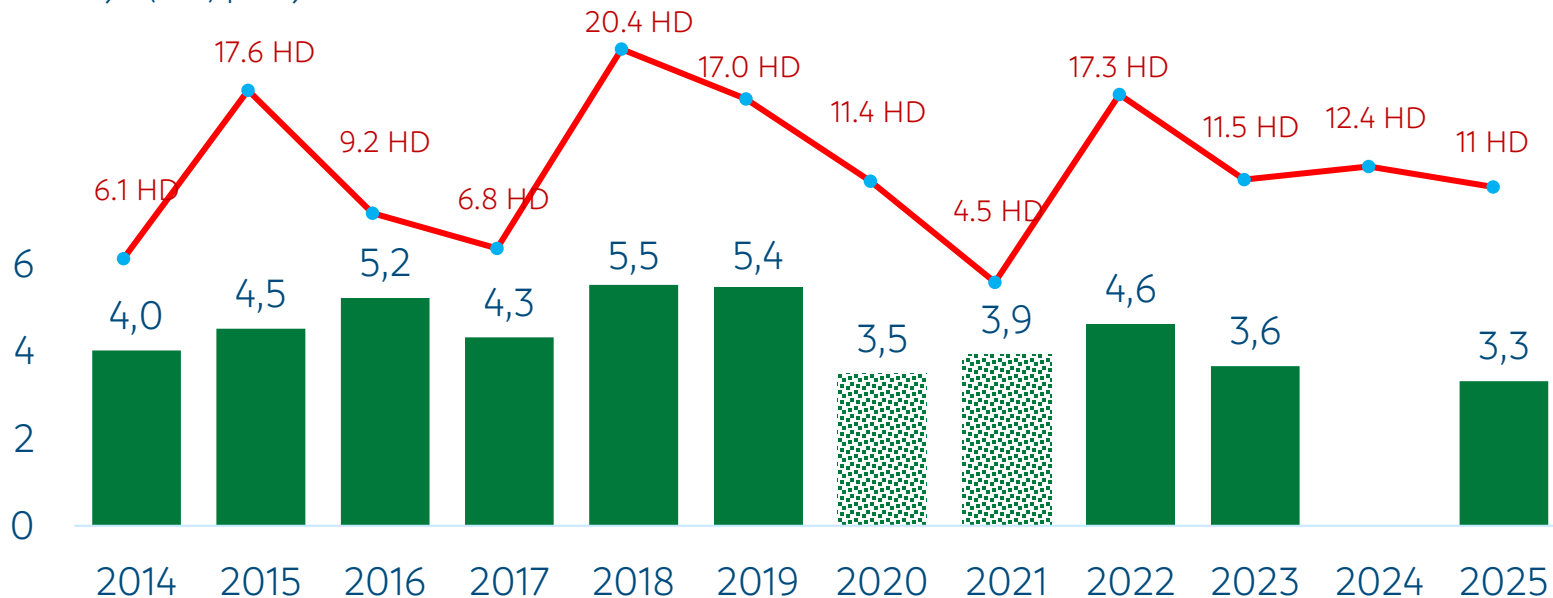
Question: When did you decide on the destination for your longest/most important cycling trip?

Climate vs. cycle tourism (1/3)



New

Number of cycle tourists with at least 3 overnight stays in the respective year (millions)
Hot days (HD) per year



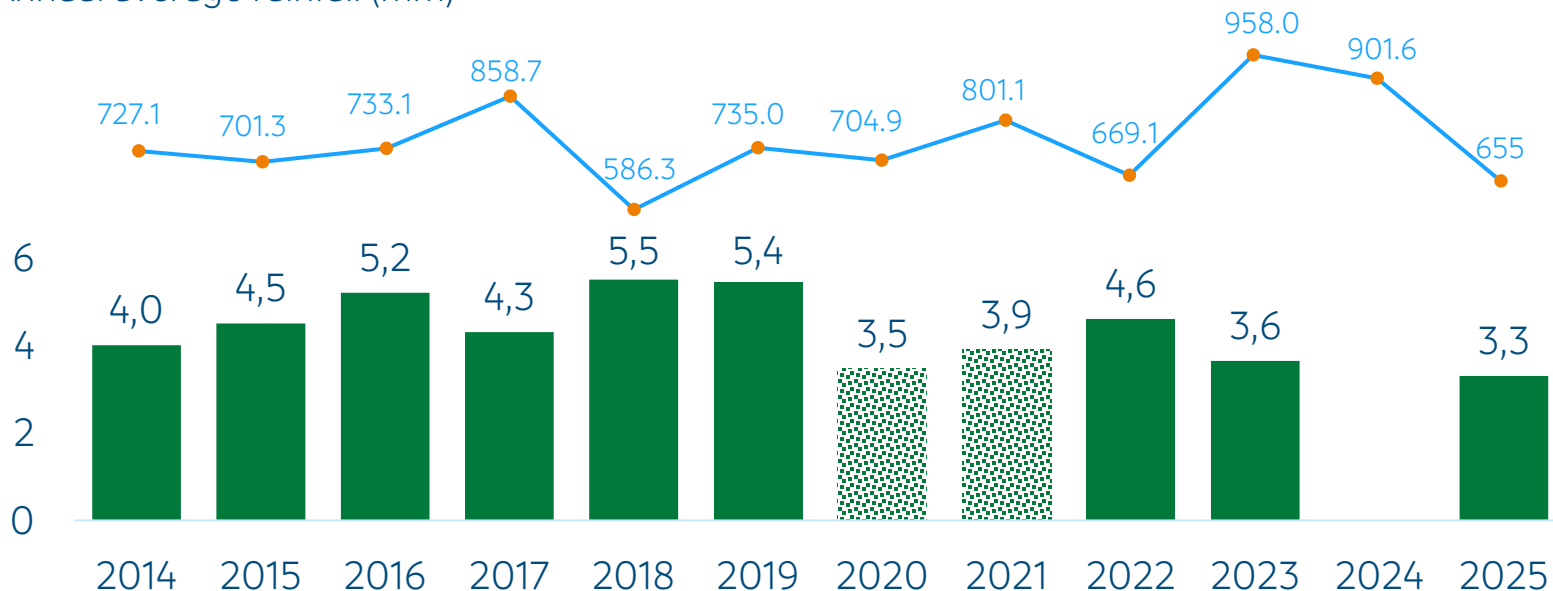
Reference group: Only cycle tourists in the respective year | No survey conducted in 2024 | Sources: Annual mean rainfall in Germany (1881–2024); German Weather Service (DWD), information published on 6 May 2025. Number of hot days (with max. air temperatures above 30°C (area average)); German Weather Service (DWD), information published on 14 November 2025.

Climate vs. cycle tourism (2/3)



New

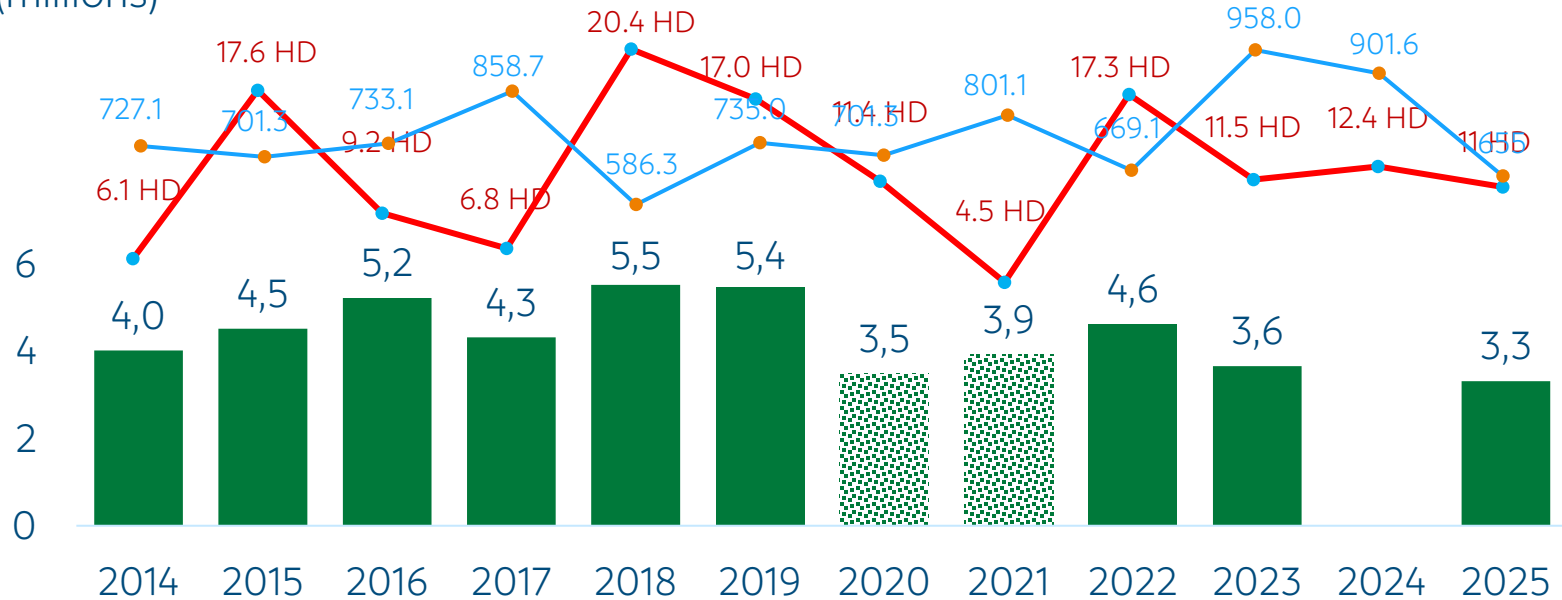
Number of cycle tourists with at least 3 overnight stays in the respective year (millions)
Annual average rainfall (mm)



Reference group: Only cycle tourists in the respective year | No survey conducted in 2024 | Sources: Annual mean rainfall in Germany (1881–2024); German Weather Service (DWD), information published on 6 May 2025. Number of hot days (with max. air temperatures above 30°C (area average)); German Weather Service (DWD), information published on 14 November 2025.

Climate vs. cycle tourism (3/3)

Number of cycle tourists with at least 3 overnight stays in the respective year (millions)



Reference group: Only cycle tourists in the respective year | No survey conducted in 2024 | Sources: Annual mean rainfall in Germany (1881–2024); German Weather Service (DWD), information published on 6 May 2025. Number of hot days (with max. air temperatures above 30°C (area average)); German Weather Service (DWD), information published on 14 November 2025.

Adaptation to climate change



Cycle tourism providers shouldn't wait for demand before they adapt their offers to climate change

Infrastructure

- Facilities to shelter from heat, storms, heavy rain
- Shaded cycle paths, access to drinking water/refill stations
- Repair and maintenance of damaged infrastructure
- Signposting of diversions

Communication

- Include tourists in communication chains during crises
- Provide real-time information on route conditions
- Plan and communicate alternative routes in advance



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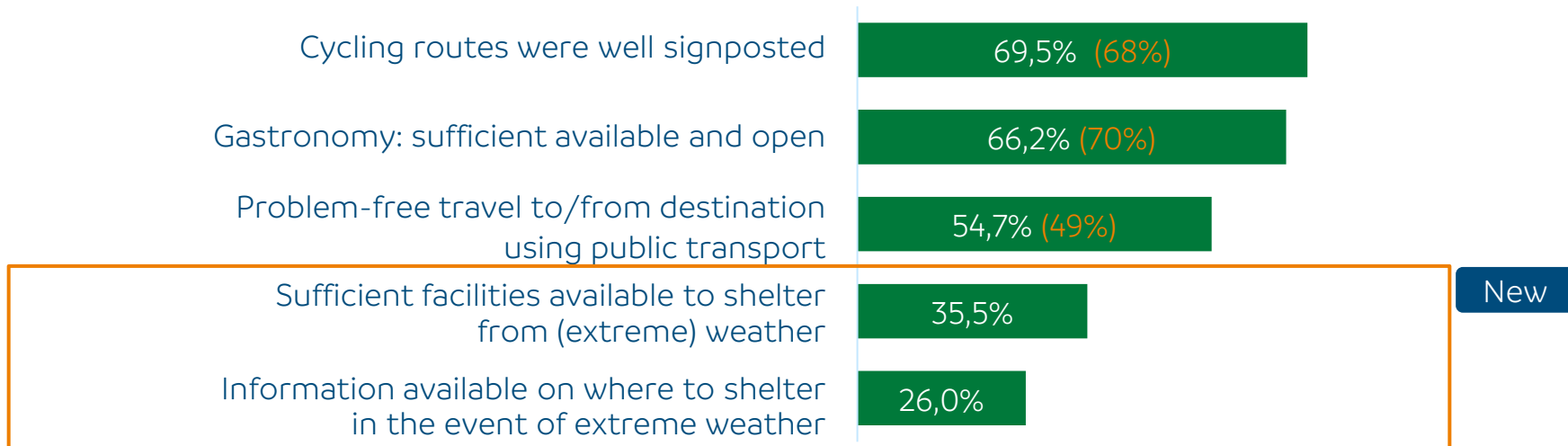


© RuhrtalRadweg / Dennis Stratmann

Cyclists' experience during their trip



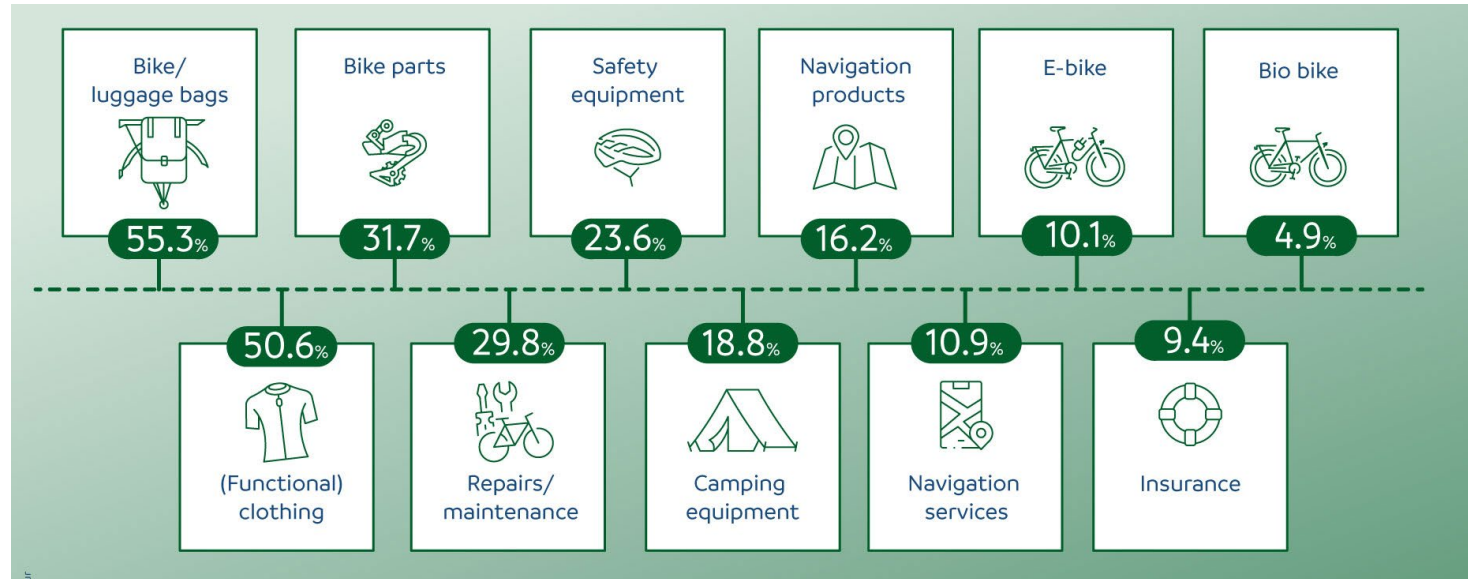
Cyclists feel that there is a lack of facilities and information on shelter from extreme weather.



Sample size: Only cycle tourists in 2025; n = 6,803 (at least 1 longer cycling trip; without “Did not use”)
Question: How would you rate the quality of the infrastructure and offers on your longest cycling trip?
Figures in brackets: Value from 2023

Cycle tourism as a purchase opportunity

For 28.7% of cycle tourists (≥ 3 overnight stays), the cycling trip was an opportunity to purchase new equipment or bike-related services.

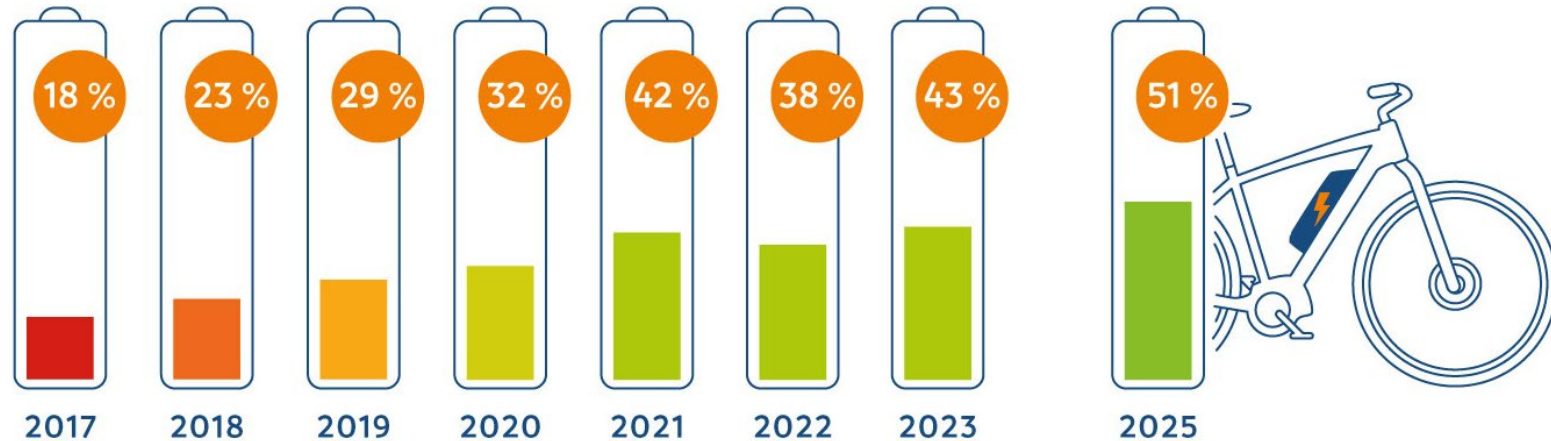


Question: Which equipment did you purchase for this cycling trip and/or which services did you use? | Reference group: Only cycle tourists in 2025, who purchased equipment/services; n = 2.070 (multiple answers possible)



E-bike usage

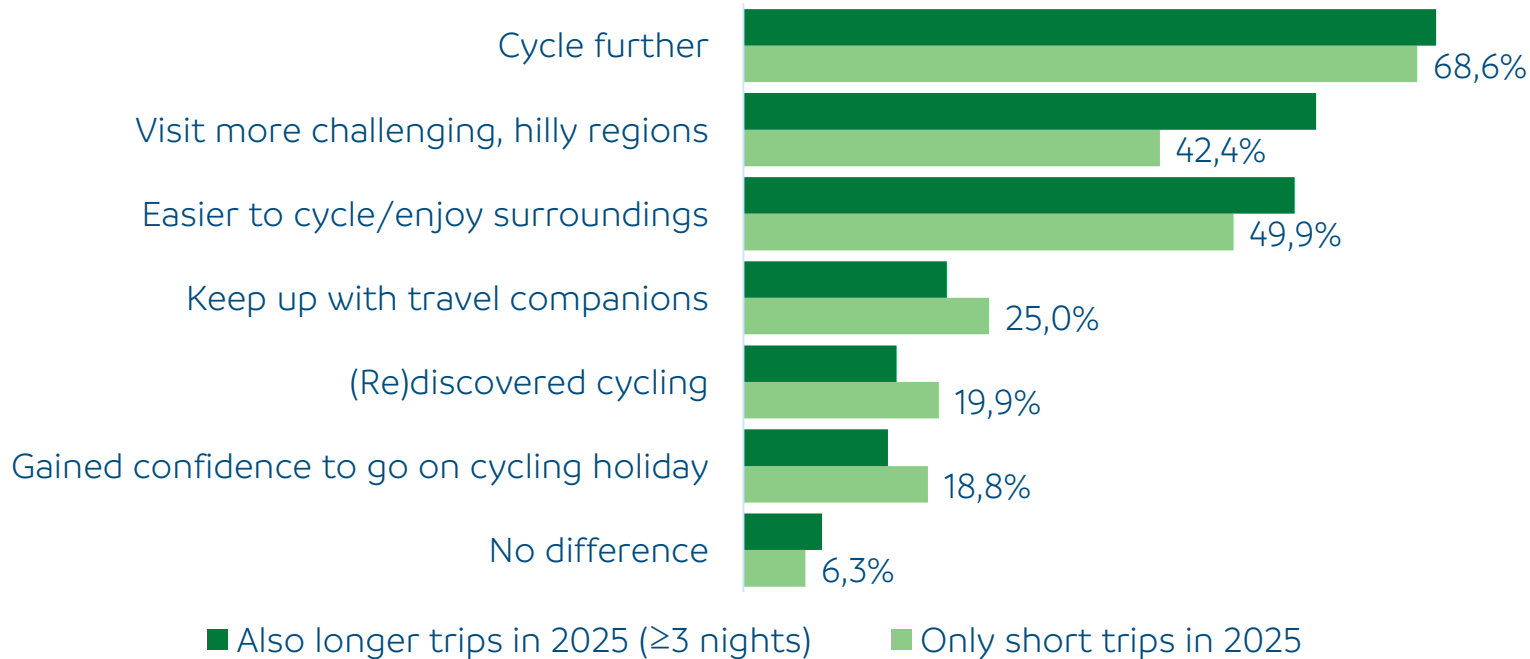
E-bikes are changing cycle tourism, but in different ways to expected.



Reasons for using an e-bike



New



Question: Why did you choose to use an e-bike?

Reference group: Only cycle tourists in 2025; n = 7,808 (multiple answers possible)

Comparison of daily kilometres



Not higher, faster, further, but rather more relaxed.

Year of cycle trip	E-bike (km/day)	Bio bike (km/day)
2025	60.3	66.9
2023	59.6	68.8
2022	60.5	68.3
2019	73.2	67.9
2017	60.5	66.2

Reference group: Only cycle tourists with ≥ 3 overnight stays in the respective years

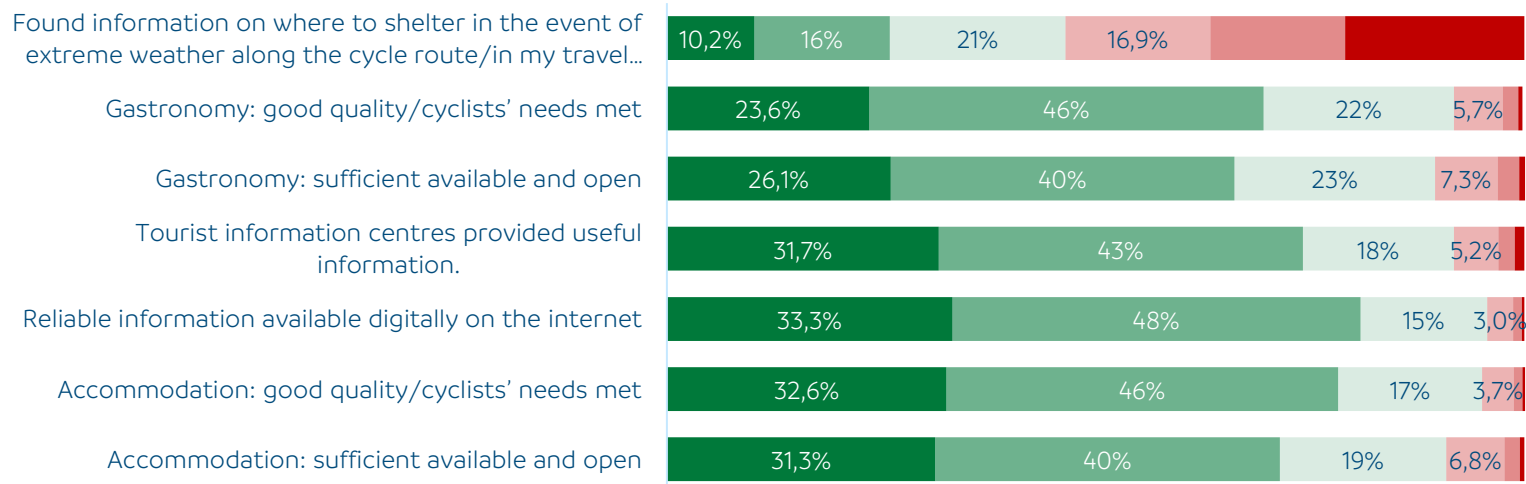
Gastronomy and accommodation



New

Cycle tourists more satisfied with quality than quantity.

■ 1 = Agree entirely ■ 2 ■ 3 ■ 4 ■ 5 ■ 6 = Disagree entirely



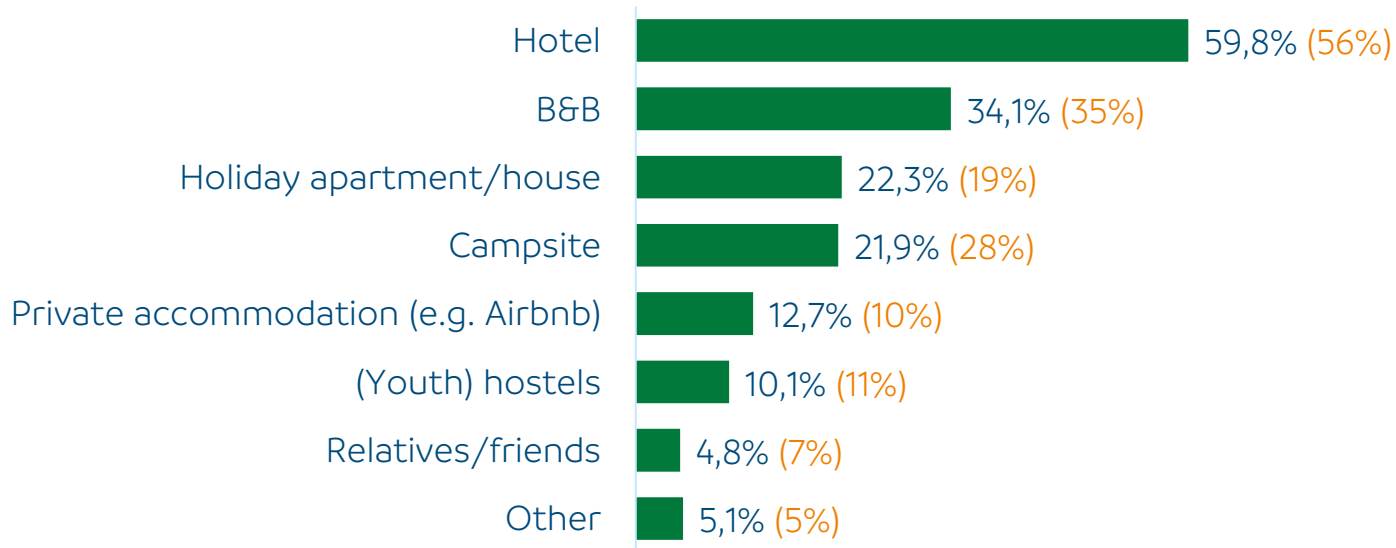
Question: How would you rate the quality of the infrastructure and offers on your longest cycling trip?

Reference group: Only cycle tourists in 2025; n = 6,803 (at least 1 longer cycling trip; without "Did not use")

Accommodation booked



Increase in hotel stays, campsites less popular

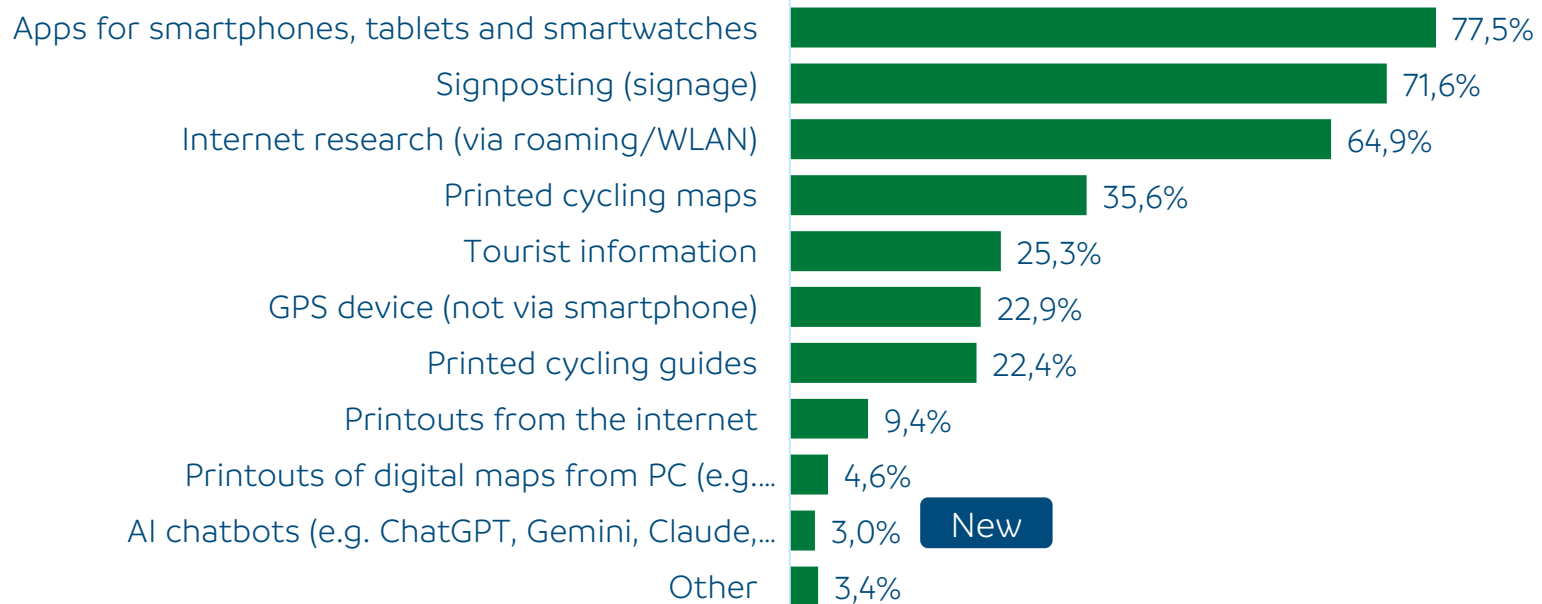


Reference group: Only cycle tourists in 2025; n = 7,808 (multiple answers possible) | Question: What type(s) of accommodation did you use during your cycling trip(s)? | Figures in brackets: Value from 2023



Information sources during cycling trips

Use of digital media increased further and AI is part of the information sources.



Question: Which information sources and media do you use during cycling trips, e.g. for orientation? Reference group: Cycle tourists in 2023/24/25; n = 10,162; Cycle tourists in 2025; n = 7,808 (multiple answers possible)

Travel destinations and conclusion

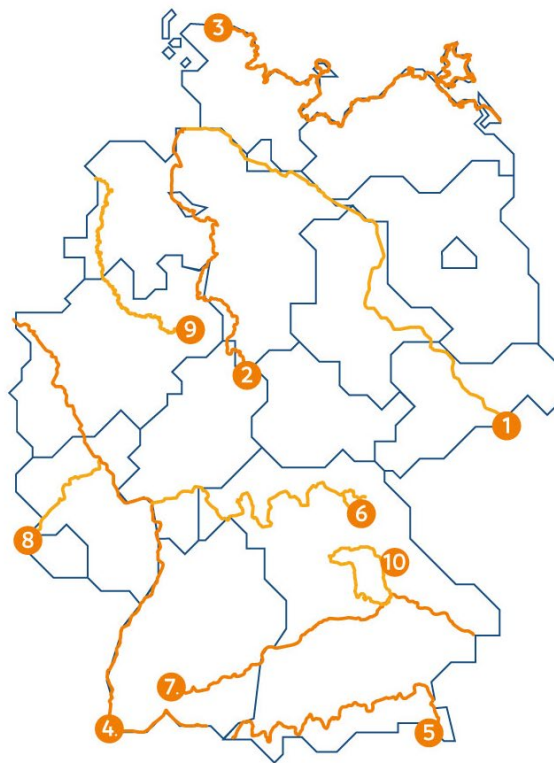
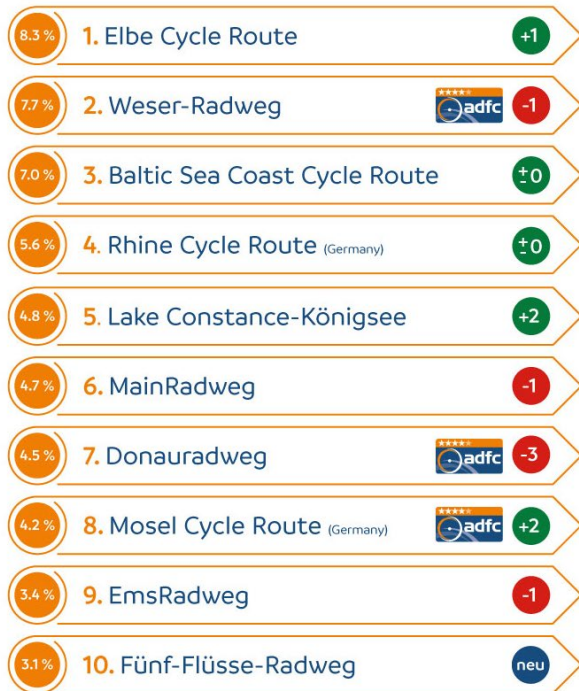
Travel destinations: stable between states

Reference group: Only cyclists, who completed a cycling trip in Germany or cycled while on holiday in Germany.

	Cycling while on holiday	Cycling trips (1–2 nights)	Cycling trips (≥3 nights)
1.	Mecklenburg-West Pomerania (21.3%)	Bavaria (22.4%)	Bavaria (28.0%)
2.	Lower Saxony (20.2%)	Lower Saxony (20.0%)	Lower Saxony (22.5%)
3.	Schleswig-Holstein (19.4%)	North Rhine-Westphalia (17.6%)	Baden-Württemberg (18.8%)
4.	Bavaria (17.6%)	Baden-Württemberg (16.1%)	North Rhine-Westphalia (17.0%)
5.	Baden-Württemberg (8.9%)	Rhineland-Palatinate (13.2%)	Mecklenburg-West Pomerania (12.9%)
6.	Brandenburg (5.2%)	Hesse (9.8%)	Hesse (11.3%)
7.	North Rhine-Westphalia (5.1%)	Brandenburg (7.6%)	Rhineland-Palatinate (10.9%)
8.	Rhineland-Palatinate (4.7%)	Mecklenburg-West Pomerania (7.1%)	Brandenburg (10.4%)
9.	Saxony (4.2%)	Saxony-Anhalt (4.9%)	Schleswig-Holstein (8.9%)
10.	Hesse (3.3%)	Saxony (4.6%)	Saxony (7.8%)
11.	Saxony-Anhalt (2.0%)	Schleswig-Holstein (4.3%)	Saxony-Anhalt (7.1%)
12.	Berlin (1.9%)	Thuringia (4.0%)	Thuringia (6.5%)
13.	Thuringia (2.3%)	Saarland (1.8%)	Berlin (3.5%)
14.	Hamburg (1.6%)	Berlin (1.5%)	Hamburg (3.0%)
15.	Bremen (0.6%)	Hamburg (1.4%)	Bremen (2.3%)
16.	Saarland (0.5%)	Bremen (0.7%)	Saarland (1.6%)










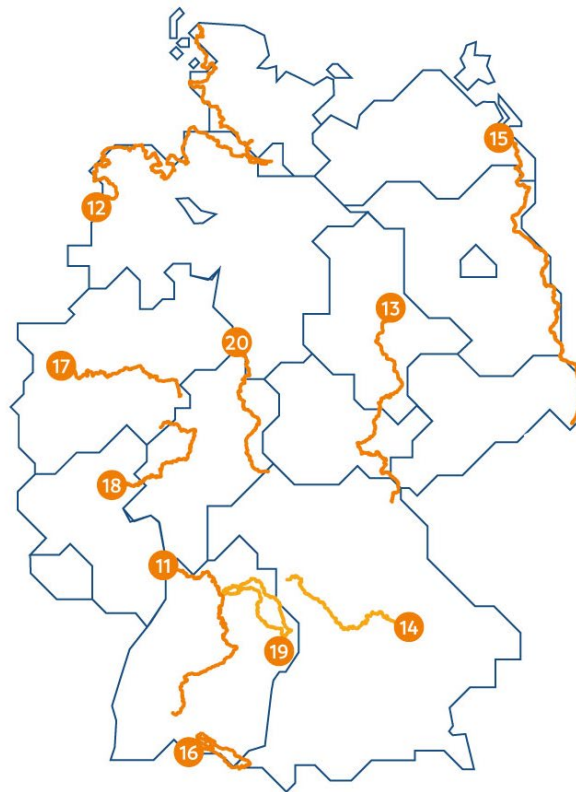
Shifting popularity of long-distance routes



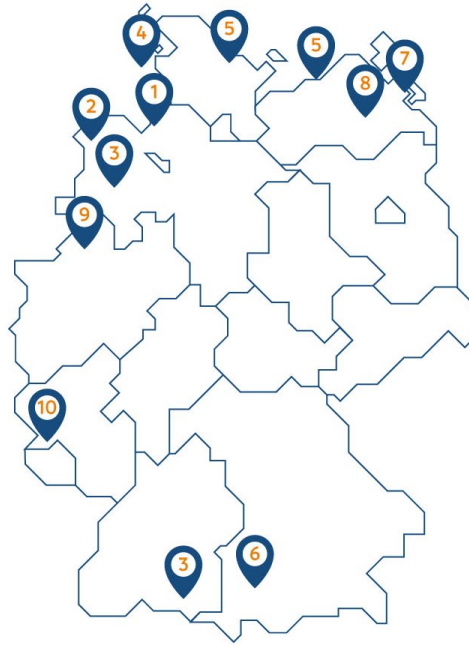
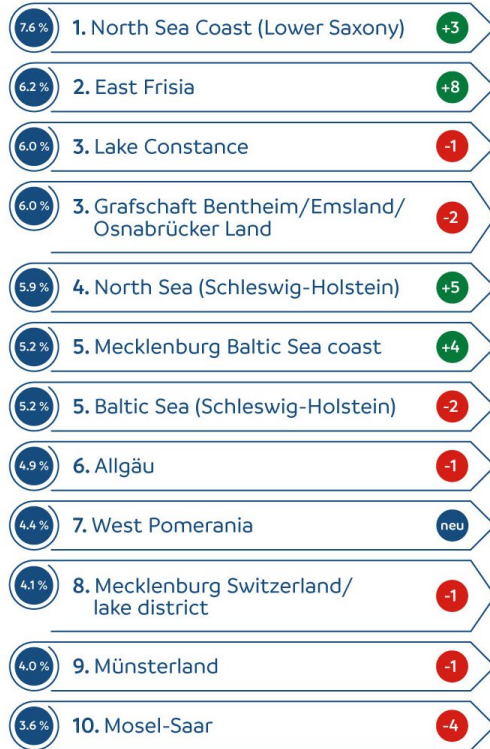
(Not so) hidden champions



- 11 Neckar Valley Cycle Route 
- 12 North Sea Cycle Route (Germany)
- 13 Saale Cycle Route 
- 14 Altmühltal/Altmühl Cycle Route
- 15 Oder-Neisse Cycle Route (Germany)
- 16 Lake Constance Cycle Route (Germany) 
- 17 Ruhr Valley Cycle Route 
- 18 Lahn Cycle Route 
- 19 Kocher-Jagst Cycle Route 
- 20 Fulda Cycle Route (HR 1) 



Fluctuating popularity within regions



Cycling destinations abroad are attractive



EuroVelo, the European cycle route network (2025) © ECF



Top 5

Cycling while on holiday

1. Netherlands (25.0%)
2. Italy (20.0%)
3. France (13.7%)
4. Austria (13.1%)
5. Denmark (9.4%)



Top 5

Cycling trips (≥3 nights)

1. Austria (28.3%)
2. Italy (25.9%)
3. France (19.6%)
4. Netherlands (16.2%)
5. Switzerland (8.4%)(+1)

“Classical” cycling trips no longer an easy sell



Fewer cycle tourists in 2025



What stops people going on a cycling trip?



1. Dependence on weather (31.4%)
2. Lack of equipment (27.2%)
3. Complicated travel to/from destination (26.3%)
4. **Effort (26.3%)**
5. Family situation (24.8%)

What do those who didn't cycle mean with "effort"?

1. Not fit enough to keep up (57.8%)
2. Prefer trips involving less physical activity (43%)
3. Too hot in the summer months (41.5%)
4. Can't cycle such long distances (34.9%)
5. Complicated travel organization (29.3%)

Reference group: People who didn't go on any cycling trips in the past 3 years; n = 6,712 (multiple answers possible) and people who found cycling trips too physically demanding; n = 1,383 (multiple answers possible)

Factors affecting cycle tourists



- Proportion of cyclists in general
- Changes in demand for certain travel destinations
- Motives for travel
- Weather
- Increased spending during trips
- Shifts within segments
- Diversification of target groups

High potential: every second person who didn't go on a cycling trip can imagine doing so in the future.



Conclusion: headwinds for cycle tourism

- Safe infrastructure is key
- Cycling day trips and cycling while on holiday as flexible, accessible options
- Communication focused on enjoyment and recreation
- Bike-friendly mobility
- Adaptation to climate change
- Nature conservation and recreation go hand in hand
- High-quality infrastructure and services for cycle tourism
- Sustainable, long-term funding – also to maintain quality
- Qualified professionals to take care of the various tasks



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Thank you!

Our thanks to:

- The cycle tourism experts from the ADFC and the state tourism organisations
- Flyer for contributing the Flyer G1 Upstreet for our prize draw
- All those who distributed our survey
- All of the cycle tourists, who completed our survey
- T.I.P. Marktforschung – Bert Hallerbach



© Flyer

Sources:

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