2018 ADFC-Travelbike Bicycle Travel Analysis

19th national survey on the bicycle travel market
Die ADFC-Travellike-Radzieleanalyse 2018
Aktuelle Zahlen und Trends

Referenten:
Louise Bohler und Frank Hofmann, ADFC

*09.03.* Die Zugang zum CityCube Berlin ist kostenfrei, jedoch muss sich der Besucher bereits über ein Ticket im CityCube im Voraus anmelden.

**ITB Berlin Ticket**

Freitag, 09.03.2018 | Cycle Tourism Day

**The benefits of cycling tourism for tourism destinations**

Cycling tourism is becoming an important feature of the tourism industry. In total, cycling tourism contributes an impressive twelve percent to the overall tourism value creation in Germany. Unlike other means of transport, the bicycle provides diverse, eventful and environmentally friendly experiences and can therefore easily be integrated into a huge range of tourism segments. This session will highlight the many benefits of cycling tourism and bring together expert speakers from the international and national (Germany) levels:

- Bernadette Edlich, Deputy National Chairwoman, ADFO
- BCB, World Tourism Organisation
- Eduardo Santander, Executive Director, European Travel Commission
- Adam Ford, Advocacy and EuroVelo Director, ECF
- Louise Bohler, Head of Tourism, ADFO
- Kathleen Lomma, Kooperation „Deutschlands schönste Flusssende“

Successful cycle tourism products:

- Examples from Germany and beyond
  
  The aim of these short interactive workshops is to provide a more detailed insight into how to develop successful cycle tourism products. The speakers talk at different aspects of product development – from route infrastructure to marketing and monitoring.

- Establishing a cycle tourism product:
  - EuroVelo 8 – Mediterranean Route
  - EuroVelo 10 – Baltic Sea Cycle Route
  - EuroVelo 15 – Rhine Cycle Route

- Panel discussion, chaired by Ed Lancaster, ECF

- Draw Cycling Paths
  - Quality and coordination as keys to success

- Paco Wollnik, Project Manager Cycling / Kämper Werbeagentur & Innovationsmanagement GmbH

- Whodo the money go?
  - Economic effects of cycle tourism explained using selected German regions

Büre Radtouristik und Louise Bohler, Head of Tourism, ADFO
ADFC: quality in cycle tourism

www.deutschland-per-rad.de
Cooperation partner: Travelbike

Quality + reliability + safety for your e-bike holidays!

- Rental of top-quality e-bikes throughout Germany and Austria
- Fully comprehensive insurance with no excess
- Expert repair service
- Central online booking portal
- Far-reaching online/offline marketing
- Strong cooperation partners:

www.travelbike.de
Methodology

**Online survey**

2 representative national online panels

Panel 1

Total population: cycling in general/ short trips/cycling holidays/ day trips by bike/ non-cycle tourists

Panel 2

Public survey via ADFC channels

Cycle tourists with ≥ 3 overnight stays

Evaluation: 8,667 respondents

Weighting of results

No dominance of enthusiastic ADFC cyclists

Representative results

Respondents aged 18+

ADFC-Travelbike 2018 Bicycle Travel Analysis
Cycling in general

76% of Germans cycle

74% daily journeys
51% trips + tours
27% sport

© Sauerland Tourismus
Cycle tourism in 2017

Day trips and short trips offer destinations extensive potential

Cycle tourists
4.3 million
- 17% (5.2 million)

Day trips
167 million
during leisure time
+ 11% (150 million)

Short trips (± 0)
4.5 million at the weekend
3.1 million during the week

+ 99 million day trips
during a holiday
Day trips
Day trips: preparation

66% recommendations from friends and family

44% internet

24% cycling maps (print)

23% brochures from tourist offices

21% apps; most popular:

| Apps | 44% | 25% |

Main online sources:

81% digital maps

46% tourist offices
Day trips: information on the go

- 60% signposting
- 34% apps
- 27% internet
- 26% cycling maps
- 25% GPS device
- 15% tourist office
- 81% location
- 65% route
- 54% weather
- 40% gastronomy

ADFC-Travelbike 2018 Bicycle Travel Analysis
Day trips: hire bikes and electric bikes

40% of day trippers are interested in hiring a bike. Of these, approx. 50% are interested in electric bikes.

Key criteria for hire bike offers:

✓ High quality
✓ Latest models and large selection
✓ Good access to offers
Day trips during leisure time: cycling behaviour

68% start from home
32% start from elsewhere

Distance from home:

- 64% car
- 23% train
- 13% public transport

- 45%: 20–40 km
- 28%: 40–60 km
- 25%: < 20 km
Day trips during holidays: motives and activities

Cycle tourists are multioptional active tourists in the region

**Motives:**
- Experience nature (74%)
- Do something for health (74%)
- Do something with other people (54%)
- Actively do sport (47%)

**Combined with:**
- Hiking (66%)
- Swimming (60%)
- Jogging (26%)
- Watersports (17%)
Short trips – compared to longer trips

Short trips with up to 2 overnight stays

• Younger target group (Ø 44 years vs. Ø 48 years)
• More women (48% vs. 36%)
• Circular tours more popular (38%)
• Cars most popular mode of transport (43%)
• Greater interest in hire bikes (68%)
• Twice as many mountain bikers (32%)
• Tend to be last-minute, additional holidays
• Other holidays: beach (40%) and family (34%) holidays
Potential of day trips and short trips

17% of the population not actively involved in cycle tourism is interested in cycling tours and trips. Of these,

- 90% are interested in day trips
- 21% are interested in short trips
Cycle tourism
Cycle tourists

2014: 4 million
2015: 4.5 million
2016: 5.2 million
2017: 4.3 million cycle tourists

75% point-to-point tours
25% circular tours

17% decrease

Rain and extreme weather in summer 2017
- Spontaneous travel decisions
- More short trips and tours
- Cycle tourism a permanent topic
- Develop flagship projects
- Prepare regions
- Synergies between active offers

77% No cycling holiday in 2017 but planning one in 2018!

2004: 2.4 million
2000: 2.0 million
Cycle tourist profile

Sociodemographics
- Ø 48 years old
- 47% 45–64 years old
- 52% travel with partner
- 35% travel with friends
- 19% travel alone
- Ø household size: 2.3 people, often no children

Bike used
- 75% touring/trekking bike
- 18% mountain bike
- 7% racing bike

Increase in electric bikes to 18% (13%)
Cycling trips

<table>
<thead>
<tr>
<th>Holiday type</th>
<th>When?</th>
<th>How long?</th>
</tr>
</thead>
<tbody>
<tr>
<td>65% additional holiday</td>
<td>Early summer most popular</td>
<td>Ø 8 overnight stays</td>
</tr>
<tr>
<td>35% main holiday</td>
<td>Cycling holiday season: Apr–Sept</td>
<td>2/3 up to one week</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>When</th>
<th>How long</th>
</tr>
</thead>
<tbody>
<tr>
<td>Ø 8 overnight stays</td>
<td>2/3 up to one week</td>
</tr>
<tr>
<td>1/3 longer than one week</td>
<td>1/3 longer than one week</td>
</tr>
</tbody>
</table>

When? Early summer most popular
How long?
Ø 8 overnight stays
2/3 up to one week
1/3 longer than one week
Sources of information

Preparation
- 86% internet → TOP: tourist office + digital maps
- 49% printed maps
- 43% print materials from tourist office
- 30% apps

On the go
- 74% signposting
- 60% cycling maps
- 50% internet
- 42% GPS device

Follow-up
- 87% reports to friends
- 24% social media
- 3% travel forums
- 3% blogs
Cycling trip organisation

84% individual travel
16% package holiday
92% with own bike

Accommodation
57% hotel
47% B&B
19% camping/caravaning
14% holiday home

75% point-to-point tours:
Ø 7 stages with Ø 64 km
Ø 9 nights

25% circular tours:
Ø 6 cycling days with Ø 55 km
Ø 6 nights

Travel to/from cycling destination
36% train / 36% car
20% bicycle
4% plane
3% long-distance bus
2% motorhome

ADFC-Travelbike Vermietung

ADFC-Travelbike 2018 Bicycle Travel Analysis
Combination of activities

- 68% visits to cultural sights
- 33% hiking/walking
- 32% swimming
- 16% spa and health offers
Potential

- 87% of cycle tourists in 2017 want to complete a trip again in 2018
- 21% planning a cycling trip in 2018, but don’t have concrete plans yet
- 7% of non-cycle tourists are interested in going on a cycling trip
- 99 million day trips during a holiday

→ activation for longer cycling holidays in regions
Quality ... quality ... quality ...

- Trend towards cycle tourism remains
- Greater diversification of demand for cycle tourism
- Quality of offers rated as positive; potential exists to improve signposting and travel to/from destinations
- Travel experience and expectations growing

Growth drivers:
- Refine profile and presentation
- Coordination and cooperation
- Quality offensive in the regions
- Synergies with other types of active holidays
- Investments in quality pay off
ADFC awards at the ITB 2018
3 stars:

Eder Cycle Route (171 km, HE)

Moated Castles Route (467 km, NW)

Heidelberg-Black Forest-Lake Constance Cycle Route (305 km, BW)
Promoted to 4 stars:

Neckar Valley Cycle Route (366 km, BW)
Kocher-Jagst Cycle Route (335 km, BW)
Vennbahn (130 km, NW + abroad: B/L)
Saarland Cycle Route (353 km, SL)

NEW ADFC Bicycle Travel Region: Wesermarsch (840 km, NI)
Routes and regions
## Most popular cycle routes in Germany

<table>
<thead>
<tr>
<th>Route</th>
<th>Rank</th>
<th>Percentage</th>
<th>Change</th>
</tr>
</thead>
<tbody>
<tr>
<td>Elbe Cycle Route</td>
<td>1</td>
<td>9.9</td>
<td>± 0</td>
</tr>
<tr>
<td>Weser Cycle Route</td>
<td>2</td>
<td>8.4</td>
<td>± 0</td>
</tr>
<tr>
<td>Ruhr Valley Cycle Route</td>
<td>3</td>
<td>6.6</td>
<td>-1</td>
</tr>
<tr>
<td>Main Cycle Route</td>
<td>4</td>
<td>3.6</td>
<td>+ 1</td>
</tr>
<tr>
<td>Ems Cycle Route</td>
<td>5</td>
<td>New</td>
<td></td>
</tr>
<tr>
<td>Rhine Cycle Route</td>
<td>6</td>
<td>3.5</td>
<td>-3</td>
</tr>
<tr>
<td>Danube Cycle Route</td>
<td>7</td>
<td>3.4</td>
<td>-3</td>
</tr>
<tr>
<td>Baltic Sea Cycle Route</td>
<td>8</td>
<td>3.0</td>
<td>-4</td>
</tr>
<tr>
<td>Oder-Neiße Cycle Route</td>
<td>9</td>
<td>2.9</td>
<td>+ 1</td>
</tr>
<tr>
<td>Mosel Cycle Route</td>
<td>10</td>
<td>2.5</td>
<td>-4</td>
</tr>
</tbody>
</table>

**Top 10 of 137 cycle routes**

For the 14th time!

ADFC-Travelbike 2018 Bicycle Travel Analysis
Most popular cycle regions in Germany

1. Bavaria 6.7% ± 0
2. Münsterland 5.2% ± 0
3. North Rhine-Westphalia 3.0% + 2
4. Ruhr Region 2.8% + 1
5. Lake Constance 2.5% - 2
6. Baltic Sea, North Germany Both 2.3% - 2/± 0
7. Thuringia, Mecklenburg-West Pomerania Both 2.2% NEW/± 0
8. Black Forest, Lower Saxony Both 1.9% - 2/± 0
9. Brandenburg, Emsland, Baden-Württemberg All 1.8% - 3/NEW/- 5
10. Mosel 1.7% ± 0

Top 10 of 171 regions

Growing popularity:
Thuringia

in% / ± comparison to 2017

ADFC-Travelbike 2018 Bicycle Travel Analysis
Most popular cycle routes abroad

Top 10 of 77 destinations

<table>
<thead>
<tr>
<th>Rank</th>
<th>Route</th>
<th>Rank</th>
<th>Route</th>
<th>Rank</th>
<th>Route</th>
<th>Rank</th>
<th>Route</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Danube Cycle Route</td>
<td>2</td>
<td>Via Claudia Augusta</td>
<td>3</td>
<td>Etsch Cycle Route</td>
<td>4</td>
<td>Alpe Adria Cycle Route</td>
</tr>
<tr>
<td></td>
<td>8.3 ± 0</td>
<td></td>
<td>3.1 ± 0</td>
<td></td>
<td>2.5 ± 1</td>
<td></td>
<td>2.1 ± 5</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>5</td>
<td>North Sea Cycle Route</td>
<td>6</td>
<td>Munich-Venice Cycle Route</td>
<td>7</td>
<td>Lake Constance Cycle Route</td>
<td>8</td>
<td>Berlin-Copenhagen Cycle Route</td>
</tr>
<tr>
<td></td>
<td>1.9 - 2</td>
<td></td>
<td>1.4 NEW</td>
<td></td>
<td>1.1 NEW</td>
<td></td>
<td>1.1 - 1</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>10</td>
<td>Baltic Sea Cycle Route</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Trend: Alp crossings

in% / + comparison to 2017

ADFC-Travelbike 2018 Bicycle Travel Analysis
# Most popular cycling regions abroad

## Top 10 of 136 regions

<table>
<thead>
<tr>
<th>Rank</th>
<th>Region</th>
<th>Cycle Tourists (%)</th>
<th>Change to 2017</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Netherlands</td>
<td>8.6</td>
<td>± 0</td>
</tr>
<tr>
<td>2</td>
<td>South Tyrol</td>
<td>3.0</td>
<td>± 0</td>
</tr>
<tr>
<td>3</td>
<td>Alps</td>
<td>3.0</td>
<td>± 1</td>
</tr>
<tr>
<td>4</td>
<td>Mallorca</td>
<td>2.9</td>
<td>± 0</td>
</tr>
<tr>
<td>5</td>
<td>Austria</td>
<td>2.7</td>
<td>- 2</td>
</tr>
<tr>
<td>6</td>
<td>France</td>
<td>2.6</td>
<td>± 0</td>
</tr>
<tr>
<td>7</td>
<td>Italy</td>
<td>2.0</td>
<td>± 0</td>
</tr>
<tr>
<td>8</td>
<td>Lake Garda</td>
<td>2.0</td>
<td>- 2</td>
</tr>
<tr>
<td>9</td>
<td>Denmark</td>
<td>1.9</td>
<td>± 0</td>
</tr>
<tr>
<td>10</td>
<td>Tyrol</td>
<td>1.5</td>
<td>NEW</td>
</tr>
</tbody>
</table>

Regions ranked very closely from second place and diverse offers: Germans are experienced cycle tourists with high quality expectations.

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ADFC-Travelbike 2018 Bicycle Travel Analysis
# Plan for 2018: travel destinations in Germany

<table>
<thead>
<tr>
<th>Rank</th>
<th>Destination</th>
<th>Rank 2017</th>
<th>Change</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Elbe Cycle Route</td>
<td>5,2</td>
<td>± 0</td>
</tr>
<tr>
<td>2</td>
<td>Danube Cycle Route</td>
<td>4,8</td>
<td>+7</td>
</tr>
<tr>
<td>3</td>
<td>Baltic Sea Cycle Route</td>
<td>4,2</td>
<td>-1</td>
</tr>
<tr>
<td>4</td>
<td>Weser Cycle Route</td>
<td>3,6</td>
<td>± 0</td>
</tr>
<tr>
<td>5</td>
<td>Mosel Cycle Route</td>
<td>3,5</td>
<td>-2</td>
</tr>
<tr>
<td>6</td>
<td>Rhine Cycle Route</td>
<td>3,3</td>
<td>± 0</td>
</tr>
<tr>
<td>7</td>
<td>Bavaria</td>
<td>3,0</td>
<td>+3</td>
</tr>
<tr>
<td>7</td>
<td>Lake Constance Cycle Route</td>
<td>2,5</td>
<td>-2</td>
</tr>
<tr>
<td>8</td>
<td>Ruhr Valley Cycle Route</td>
<td>2,5</td>
<td>-1</td>
</tr>
<tr>
<td>9</td>
<td>Oder-Neiße Cycle Route</td>
<td>2,2</td>
<td>NEW</td>
</tr>
<tr>
<td>10</td>
<td>Emsland</td>
<td>2,1</td>
<td>NEW</td>
</tr>
</tbody>
</table>

Top 10 of 242 destinations

Multiple routes available

In % / ± comparison to 2017

ADFC-Travelbike 2018 Bicycle Travel Analysis
Plan for 2018: travel destinations abroad

<table>
<thead>
<tr>
<th>Rank</th>
<th>Destination</th>
<th>Top 10 of 40 destinations</th>
<th>±</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Austria</td>
<td>29</td>
<td>± 0</td>
</tr>
<tr>
<td>2</td>
<td>Italy</td>
<td>28</td>
<td>± 0</td>
</tr>
<tr>
<td>3</td>
<td>France</td>
<td>25</td>
<td>± 0</td>
</tr>
<tr>
<td>4</td>
<td>Netherlands</td>
<td>21</td>
<td>± 0</td>
</tr>
<tr>
<td>5</td>
<td>Spain</td>
<td>13</td>
<td>± 0</td>
</tr>
<tr>
<td>6</td>
<td>Denmark</td>
<td>12</td>
<td>+ 1</td>
</tr>
<tr>
<td>7</td>
<td>Switzerland</td>
<td>8</td>
<td>- 1</td>
</tr>
<tr>
<td>8</td>
<td>Belgium</td>
<td>7</td>
<td>± 0</td>
</tr>
<tr>
<td>9</td>
<td>Poland</td>
<td>7</td>
<td>NEW</td>
</tr>
<tr>
<td>10</td>
<td>Sweden</td>
<td>6</td>
<td>± 0</td>
</tr>
<tr>
<td></td>
<td>Baltic Region</td>
<td>6</td>
<td>NEW</td>
</tr>
</tbody>
</table>

in% / ± comparison to 2017

Multiple routes available

ADFC-Travelbike 2018 Bicycle Travel Analysis
Everyday cycling

88% of cycle tourists also cycle in their daily lives

Cycling on holiday influences daily bicycle usage:

29% cycle more in their daily lives after their cycling trip!
Thank you for your attention!
ADFC-Fachveranstaltungen
Fahrradtourismus
Internationale Tourismus-Börse
ITB Berlin 2018
08.—09. März 2018

Donnerstag, 08.03.2018 | Fachbesuchertag

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Louise Bölter, Head of Tourism, ADFC
Kathleen Lanna, Kooperation „Deutschlands schönste Flusslandschaften“

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Panel discussion, chaired by Ed Lancaster, ECF

Dr. Mike Craig: Quality and coordination as keys to success
Paco Wexler, Project Manager Cycling & KlimaVerbund, Marketing & Innovationsmanagement GmbH
WHO does the money go to?
Economic effects of cycle tourism explained using selected German regions
Dörte Radusch und Louise Bölter, Head of Tourism, ADFC

Kontakt
Allgemeiner Deutscher Fahrrad-Club e. V.
Bundesverband
Mohrenstraße 69
10117 Berlin
Tel. +49 (0) 30 209 14 86-0
kontakt@adfc.de
www.adfc.de

ADFC-Messestand
Halle 12 – Stand 102
Am Stand der Deutschen Zentrale für Tourismus

Der ADFC auf der ITB
Der ADFC präsentiert seit 26 Jahren Fachveranstaltungen für touristische Organisationen und Anbieter, Planer und Entscheider. In diesem Jahr stehen das Thema Radtourismus und die Ausgestaltung der Messestande im Mittelpunkt. Der ADFC bietet Ihnen die Möglichkeit, sich über aktuelle Entwicklungen in der Radtourismusbranche und die Zukunft der Radtourismus zu informieren.

https://ADFC/ITB

* 08.03. Der Zugang zum CityCube Berlin ist kostenlos; jedoch muss sich aufgrund erhöhter Sicherheitsvorkehrungen (oder Besucher ohne gültiges ITB Berlin Ticket) der Eingang des CityCubes registrieren lassen.
09.03. Für den Besuch der Veranstaltungen auf dem ITB-Messegelände benötigen Sie ein Fachbesucherticket.