

2018 ADFC-Travelbike Bicycle Travel Analysis

Trip and travel volumes and potential

- **Cycling in general:** 76% of Germans cycle occasionally to regularly. Of these, 74% use their bicycle for everyday journeys, 51% for cycling trips and tours and 27% for sports purposes (multiple answers possible).
- **Cycling trips:** In 2017, 64% of the cycling population completed at least one bicycle day trip in their leisure time that started from home. This corresponds to 167 million day trips during leisure time (2016: 150 million, 11% increase). In addition, around 99 million day trips were completed during a holiday. An average of eight day trips were completed during leisure time and six day trips during holidays.
- **Short trips:** 4.5 million people completed cycling trips with a maximum of two overnight stays at the weekend and 3.1 million people completed such trips during the week (2016: 4.5 million at the weekend; 3.0 million during the week; cyclists may have completed both).
- **Cycle tourism:** Taking the population as a whole (aged 18+), 10% of cycle tourists completed at least one cycling trip with at least three overnight stays in the past three years (same as in 2014–16).
- **2017:** 6.2% of cycle tourists aged 18+ of the total population completed a cycling trip in 2017. This corresponds to 4.3 million people and represents a 17% decrease compared to 2016 (5.2 million).
- **Potential:** 87% of cycle tourists, who completed a cycling holiday in 2017, want to do so again in 2018. As many as 77% of cycle tourists, who did not complete a cycling holiday in 2017, want to go on a cycling holiday in 2018. The willingness to complete a cycling holiday in the following year therefore increased from 84% in 2016 to 87% in 2017.
- **Planning for 2018:** Particularly German travel destinations stand to benefit: 64% of respondents are interested in a cycling holiday in Germany. 36% were interested in other European countries as potential travel destinations and 3% for overseas. 21% have not yet decided on their destination. (In comparison: 26% of all Germans are planning a holiday in Germany in 2018. *Foundation for Future Studies – 2018 Tourism Analysis*)
- **Non-cyclists and potential:** Many of those, who have not cycled in their leisure time before, can imagine completing a cycling trip in the future. This offers additional potential of 17% of the total population (aged 18+) – so 11.4 million people can still be won over for cycle tourism. Day trips were particularly popular: 90% of respondents expressed an interest. 28% of holidaymakers can imagine undertaking shorter and longer cycling trips. More than half were interested in electric bikes.
- **For foreign visitors to Germany,** cycling and mountain biking (11%) are the second most popular (sporting) activities after hiking (14%). The top three countries of origin of foreign cycle tourists are the Netherlands, Switzerland and Belgium. The following five motives play a key role in the decision to go cycling in Germany: scenery and nature, cycle routes and MTB trails, sights, location/town/architecture, and recommendations from friends and acquaintances. (*DZT Quality Monitor Survey of Tourism in Germany 05.2015–10.2017 / Source: DZT/WTM, IPK 2017*)

Cycle tourism: data, facts, figures

Trip behaviour

- **Start:** 68% set off by bike directly from home, 32% started from elsewhere, with the majority (64%) travelling to their cycling destination by car. 36% travelled by public transport or train. The starting point is rarely more than 60 km away.
- **Activities:** Other than cycling, the most popular activities on holiday are hiking, swimming and jogging.
- **Motives:** Beside experiencing nature (74%), the focus is on the health aspect (74%) during cycling trips, followed by the opportunity to do something with other people (54%), actively do sport (47%) and find a balance to daily life (39%).
- **Information:** When preparing for their trip, day trippers mainly rely on personal recommendations (66%), followed by internet research (44%). Google Maps plays a key role here (81%) and online information provided by tourist organisations is used by 46% of respondents. After Google Maps (44%), komoot is the second most popular app used by 25% of people.
- **On the go:** During cycling trips, signposts are the most important source of information (60%), followed by apps (34%). Google Maps is particularly popular here (52%), followed by komoot (10%). Printed cycling maps and GPS devices were both deemed equally important by 25% of respondents. For the 27% of respondents, who obtain information online when on the go, they mostly inform themselves about the location (81%), route (65%), weather (54%) and gastronomy offers (41%).
- **Hire bikes:** 40% of day trippers are interested in hiring a bike. They emphasised quality as the most important criterion and expect the latest bike models to be offered. Half of them were interested in electric bikes.

Travel behaviour

- **Age:** The average age of cycle tourists is 48. Almost half are aged between 45 and 65 years. 34% are aged 25 to 44 years. 15% are over the age of 65.
- **Motives:** Experience nature (74%), explore new regions (71%), actively do sport (66%), do something for their health (57%) and ride a specific route (50%) are the main reasons for a cycling trip.
- **Information:** The internet remains the #1 source of information to prepare for cycling trips (86%), followed by printed maps (49%). 43% of respondents used print materials from tourist offices to inform themselves – a significant increase compared to the previous year (2016: 28%). 70% of internet users obtain information from tourist organisations and 40% from hotel and travel portals. 30% use travel blogs and the Bett+Bike website. komoot (37%) and Google Maps (17%) are the most popular apps.
On the go, cycle tourists obtain information most frequently from signposting (74%), cycling maps (60%) and internet research (50%). Apps and GPS devices play a role for 42% of respondents. Google Maps (34%) and komoot (28%) are also the most popular apps here. The location, weather and route are researched online and accommodation is sought.
After their holiday, cycle tourists most frequently report back about their trip during discussions with friends, family and acquaintances (87%). Social media, travel forums and blogs play a lesser role.
- **Trip duration:** Most cycling trips last up to one week (40%). In 2017, the number of trips lasting up to three days increased to 28% (2016: 20%). 22% of trips last up to two weeks. 9% of respondents completed cycling trips with 15 or more overnight stays.
- **Main/additional holiday** For 65% of respondents, the cycling holiday was an additional holiday. For 35%, it was the main holiday. When the cycling holiday was the main holiday, there were an average of 12 overnight stays; when it was an additional holiday, the average was five overnight stays.
- **Trip organisation:** 84% of cycle tourists organised their cycling trip for themselves; 16% opted for a package holiday.
- **Travel in the region/on the cycle route:** 25% explored the region from fixed accommodation (circular tours). 75% stayed in changing accommodation (point-to-point tours).

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- **Kilometres cycled:** Most cycle tourists (45%) cover 40–60 km in the region. 36% of point-to-point cyclists cover 60–80 km per day, 28% cover 40–60 km, and 25% more than 60 km. An average of 64 km are travelled each day.
- **Travel companion:** Cycle tourists are mainly accompanied by their partner (52%) or friends (35%). 22% of cycling trips are completed in a small group of up to five people. 19% travel alone.
- **Overnight stays:** 57% of cycle tourists prefer to stay in a hotel, 47% stay in a B&B, 19% camp, 14% book a holiday home and 13% use private accommodation such as Airbnb offers. When selecting their accommodation, cycle tourists appreciate value for money (73%) and a good location and access (70%). The facilities offered are important for 32% of cycle tourists and 24% give preference to Bett+Bike accommodation.
- **Travel to/from the cycling destination:** 36% travel by train and 36% travel by car. 20% start directly from home. Just 4% travel by plane.
- **Bicycle travel:** The majority (75%) use a touring or trekking bike. 18% use a mountain bike and 7% a racing bike. Overall, 18% of cycle tourists use an electric bike. This figure has increased significantly compared to 2016 (13%). The proportion of hire bikes increased from 7% to 8%.
- **Quality of offers:** The quality of German regions and long-distance cycle routes tends to receive positive ratings and has improved significantly compared to 2016 (e.g. more reliable digital data and more routes with less traffic). Room for improvement was particularly seen with regard to the signposting and travel to/from the cycling destination by train.
- **Combinations:** Beside cycling, cycle tourists were also particularly interested in cultural sights (68%), hiking (33%), swimming (32%) and health offers (16%).
- **Everyday cycling:** 88% of cycle tourists also cycle in their daily lives. For 29%, cycling on holiday led them to cycle more in their daily lives (2016: 30%).

Short trips – comparison with longer cycling trips

- **Age/gender:** Cycle tourists completing short trips tend to be younger on average (44 years). The proportion of people aged 25 to 44 years is significantly higher than among the cycle tourists taking longer trips (46% vs. 32%). Women complete more short trips than men (48% vs. 36%).
- **Motives:** Experience nature (79%), actively do sport (68%), explore new regions (61%), do something for their health (55%) – the key motives are similar to for longer cycling trips.
- **Trip organisation:** 93% organise their short trips themselves (93% vs. 84% for longer trips); just 7% opt for a package deal.
- **Travel in the region/along a route:** 63% of cycle tourists on a short trip also change their accommodation. However, cycle tourists tend to opt for fixed accommodation more often when on a short trip (38%) than during a longer trip (25%).
- **Kilometres cycled:** Cycle tourists on a short trip cover an average of 55 km per day – 10 km less than cycle tourists completing a longer trip.
- **Travel companion:** Short trips are more likely to be completed with a partner than long trips (58% vs. 52%).
- **Travel to/from the cycling destination:** Cycle tourists on short trips are more likely to travel to their destination by car than those completing longer cycling trips (42% vs. 36%) and less likely to travel by train (22% vs. 36%). 32% set out from and return home by bike. This is more than among cycle tourists on longer cycling trips (20%).

Cycle tourism: data, facts, figures

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 fourteenth time. The Weser Cycle Route places second. The Ruhr Valley Cycle Route takes third place and the Main Cycle Route is fourth. The Ems Cycle Route is a newcomer to the top ten, ranked fifth, closely followed by the Rhine Cycle Route, Danube Cycle Route and Baltic Sea Coast Cycle Route. The Oder-Neiße Cycle Route and Mosel Cycle Route are ranked ninth and tenth. A total of 137 long-distance cycle routes were mentioned.
- Bavaria is once again the **most popular German bicycle travel region** – for the seventh time in a row! Münsterland ranked second. North Rhine-Westphalia, the Ruhr region and Lake Constance took the third to fifth places. The differences between the next most popular regions were so minor that several cycle regions achieved the same top ten ranking. A total of 179 regions* were mentioned. **(Open survey, hence regions, areas and federal states possible)*
- The **most popular long-distance cycle route abroad** by a clear margin is once again the Danube Cycle Route (Passau–Vienna), followed by the Via Claudia Augusta and the Etsch Cycle Route. The relatively new Alpe Adria cycle route has risen five places to rank fourth. The North Sea Cycle Route has dropped three places to now rank fifth. The relatively new Munich–Venice Cycle Route and Lake Constance Cycle Route are newcomers to the top ten. The Berlin–Copenhagen Cycle Route and the Elbe Cycle Route were ranked eighth and ninth respectively. The Baltic Sea Coast Cycle Route once again took tenth place. A total of 77 long-distance cycle routes were mentioned.
- **The most popular bicycle travel region abroad** by a long way remains the Netherlands. South Tyrol retains its second place. The Alps, Mallorca, Austria, France, Italy, Lake Garda and Denmark also feature among the top ten. New to the top ten is Tyrol, which is ranked tenth. A total of 136 regions* were mentioned. **(Open survey, hence regions, areas and countries possible)*
- **For the 2018 season**, particularly cycling trips along the Elbe and Danube are planned in Germany, followed by trips along the Baltic Sea Coast Cycle Route, Weser Cycle Route, Mosel Cycle Route and Rhine Cycle Route. Bavaria has once again risen three places in the ranking to rank seventh overall. It is followed by the Lake Constance Cycle Route and the Ruhr Valley Cycle Route. The Oder-Neiße Cycle Route and Emsland are both new to the top ten. A variety of different destinations were mentioned – 242 in total.
- As in the previous year, Austria, Italy, France, the Netherlands, Spain and Denmark were popular **overseas cycling trip destinations**. A total of 40 travel destinations were mentioned. Long-haul travel remains negligible.

Travel to/from the cycling destination by rail and bus

- **Long-distance rail travel:** In 2017, Deutsche Bahn transported 341,269 bicycles (2016: 327,694) – an increase of around 4%. *(DB Fernverkehr AG)*
- **International rail travel (DB International):** There was a 12% increase in cross-border bicycle carriage abroad trains. In 2017, 66,140 bicycles were transported (2016: 58,912 bicycles). *(DB Fernverkehr AG)*
- **Long-distance bus travel:** The number of bicycles transported by long-distance bus increased further. In 2017, FlixBus transported a total of 98,013 bicycles (2016: 85,000) – a 15% increase compared to the previous year. *(FlixBus)*

Developments

- **Cycle tourism continues to boost tourism in Germany:** 68% of respondents are planning to complete a cycling trip in Germany in 2018. 21% could still be won over, as they have not yet decided on their cycling destination.
- **Incoming tourism:** Scenery/nature and cycle routes are the most important criteria for foreign cycle tourists.

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- **ADFC Quality Routes:** The classification is an incentive to improve quality. The Saarland Cycle Route, for example, improved its rating from three stars to four, and motivated residents to get involved and invest in the quality route, as was the case with the Drau Cycle Path.
- **Alp crossings:** The terrain doesn't always have to be flat: interest in traversing the Alps is also growing. New routes are ranked highly in the top ten of the most popular routes abroad.
- **Differences:** The differences in ranking are decreasing between routes and regions – just one more incentive to invest more in corporate identity.
- **Smart biking** is growing in popularity: the relevance of smart bikes is growing in cycle tourism.
- **Electric bikes:** The proportion of cycle tourists using an electric bike once again increased and now lies at 18%. (In 2016, the proportion of e-bikes in the overall bicycle market was 15%, which corresponds to 607,500 electric bikes sold. *ZIV – Zweirad-Industrie-Verband 2016*)
- **Season start:** A growing number of metropolises publish attractive magazines promoting cycling trips before the start of the cycling season. Experienced ADFC tour guides reveal the most popular cycle routes. The komoot app regularly provides digital trip suggestions for the weekend. This is an incentive for the regions around major cities to invest in bicycle-friendly infrastructure to attract day trippers.

From the routes and regions

- **Saarland:** According to the extrapolation for the bicycle traffic analysis of the cycling network in Saarland conducted in 2016, 1.5 million people cycle in Saarland every year. Most respondents rate the overall infrastructure and signposting as good to very good and around 85% would recommend Saarland to others as a cycling destination. Day trippers spend an average of €16 per day. Cycle tourists (touring and regional cyclists) spend an average of €76.50 per day, of which a good €43 per day is spent on accommodation. Quality helps to create a positive image, which is reflected in the annual total value added of €6.6 million from cycle tourism in Saarland. (*Tourismuszentrale Saarland GmbH*)
- **Lower Saxony:** The bicycle traffic analysis conducted in Lower Saxony in 2016 revealed that the proportion of regional cyclists increased by 10% compared to 2015 while the proportion of touring cyclists remained unchanged. The number of cycling day trips decreased by 10%. Electric bike usage doubled to 34%. The offers and infrastructure were rated as good to very good by 93% of cycle tourists. The total annual value added for the long-distance cycle routes investigated amounted to €106 million. (*TourismusMarketing Niedersachsen GmbH: 2016 Bicycle Traffic Analysis for Lower Saxony*)
- **Drau Cycle Path:** The 5-star ADFC Quality Route benefits from the ADFC classification: the number of cycle tourists continues to grow. The partners (Carinthia, South Tyrol, East Tyrol, Slovenia and Croatia) promote the cycle route through storytelling. The Slovenian section between Dravograd and Maribor is to be developed for cyclists by 2020 with an investment of €15 million. The length of the Drau Cycle Path will therefore increase by 200 km to a total length of 520 km. (*Kärnten Werbung*)
- **Cooperations between rail and route providers:**
 - Alpe Adria Cycle Route:** The ideal complement to a cycle route leading over the Alps: the cross-border MICOTRA trains that run between Udine and Villach are very popular. In 2017, 17,500 bicycles were transported – a 36% increase compared to 2016. (*Kärnten Werbung*)
 - Tauern Cycle Trail:** In 2017, the Pinzgau local railway transported 9,700 bicycles to the start of the route in Krimml. (*SalzburgerLand Tourismus GmbH*)

The ADFC and cycle tourism

- With 'Deutschland per Rad entdecken', the ADFC provides inspiration for the next cycling trip and promotes German cycle tourism within Germany. With the combination of a brochure, online presence and accompanying marketing activities, 'Deutschland per Rad entdecken' is the most successful national marketing campaign for German cycle tourism and the market leader in the

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bicycle travel brochure segment. The German National Tourist Board (DZT) advertises attractive cycling destinations in Germany abroad via www.germany.travel/radfahren and maintains a long-standing cooperation with the ADFC.

- **ADFC Quality Routes and ADFC Cycling Holiday Regions:** The ADFC has awarded quality seals to long-distance cycle routes since 2006 and to bicycle travel regions since 2013. A total of 38 long-distance cycle routes and four bicycle travel regions have been awarded a quality seal (runtime: three years). Around 12,000 kilometres have been checked by ADFC experts, kilometre by kilometre.

Routes with .../ certified regions	5 stars	4 stars	3 stars	Regions
Total routes/regions	4	24	10	4

The following ADFC Quality Routes were honoured at the ITB: (* promoted from 3 stars)

3 stars: Eder Cycle Route, Moated Castle Cycle Route, Heidelberg-Black Forest-Lake Constance Cycle Route

4 stars: Neckar Valley Cycle Route*, Kocher-Jagst Cycle Route*, Vennbahn*, Saarland Cycle Route*

The Wesermarsch was named as a new ADFC Bicycle Travel Region.

- **Radurlaub brochure:** The ADFC presents 110 ideas for holidays in Germany, Europe and worldwide from 42 reputable cycling trip organisers in its 'Radurlaub' cycling holiday brochure for 2018, which is also available online (www.radurlaub-online.de).
- **ADFC-led cycling tours:** The ADFC is the world's largest provider of guided cycling tours. In 2017, 2,700 tour guides led 131,000 participants on 11,000 ADFC cycling tours covering 5.6 million kilometres – 140 times the earth's circumference!
- **ADFC cycling maps** are the most popular cycling maps in the world and cover the whole of Germany (1:150,000).
- **ADFC regional maps** provide orientation in the regions. They are ideal for day trips and weekend tours (available in 1:50,000 and 1:75,000).
- **ADFC tour and trip guides** generate interest in new destinations and supply the according maps.
- **Bett+Bike:** 6,000 bicycle-friendly hosts meet the ADFC's quality criteria and have been certified as Bett+Bike establishments. A wide network is available for cycle tourists for planning a cycling holiday in Germany, Denmark, Austria, Belgium, Luxembourg and beyond. The Bett+Bike hosts cater to both point-to-point tourists and regional cyclists. The sport, city and camping categories provide target group-appropriate offers and cater specifically to cyclists' special needs. The free Bett+Bike app and www.bettundbike.de platform allow all accommodation to be searched and reviewed at a glance.
- **ADFC Dachgeber:** Will be published in 2018 for the thirty-first time since its introduction in 1987. The directory of private accommodation offered according to the principle of reciprocity currently contains 3,235 addresses and a total of 17,510 free accommodation offers.

Sources:

The figures originate from the 2018 ADFC-Travelbike Bicycle Travel Analysis, T.I.P. Biehl & Partner as well as the ADFC. Where information has been obtained from other providers, the source is indicated in brackets. The 2018 Bicycle Travel Analysis (data sheet as well as short and long versions of the presentation) is available for download on www.adfc.de/radreiseanalyse.

Contact

Louise Böhler
Head of Tourism
Allgemeiner Deutscher Fahrrad-Club e. V.
German National Cyclists' Association (ADFC)
National association
Mohrenstrasse 69
10117 Berlin

Telephone: +49 30 20922398-59
Fax: +49 30 20922398-55
Email: louise.boehler@adfc.de
Internet: www.adfc.de