2018 ADFC-Travelbike Bicycle Travel Analysis

19th national survey on the bicycle travel market
**ADFC-Fachveranstaltungen**
**Fahrradtourismus**
**Internationale Tourismus-Börse ITB Berlin 2018**

08.–09. März 2018

---

**Donnerstag, 08.03.2018 | Fachbesuchertag**

10.00-11.00 Uhr
CityCube Berlin, Raum A 7
**ADFC-Travelbike-Radreiseanalyse 2018**
Aktuelle Zahlen und Trends

Referenten:
Louise Bößner und Frank Hofmann, ADFC.

*08.03.* Der Zug zum CityCube Berlin ist kostenlos, jedoch muss sich aufgrund erhöhter Sicherheitsvorkehrungen (oder Bisikletter ohne gültiges ITB Berlin Ticket) ein Engang des CityCubes registrieren lassen.
09.03. Für den Besuch der Veranstaltungen auf dem ITB-Messeareal Berlin benötigen Sie ein Fachbesucherticket.

---

**Freitag, 09.03.2018 | Cycle Tourism Day**

11.30-12.30 Uhr
Hall 4.1, Main Stage
**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, plentiful and environmentally friendly experiences and can therefore easily be integrated into a range of tourist segments. This session will highlight the many benefits of cycling tourism and bring together expert speakers from the international and national (Germany) levels.

Renee Adler, Deputy National Chairwoman, ADFO TBC; World Tourism Organisation
Eduardo Santander, Executive Director, European Travel Commission
Adrian Blacker, Advocacy and EuroVelo Director, ECF
Louise Bößner, Head of Tourism, ADFC
Kathleen Lomma, Kooperation „Deutschlands schönste Flusslandschaft“

**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 Cycle Path:**
Quality and coordination as keys to success
Paco Wollf, Project Manager Cycling | Kölner Verkehr Marketing & Innovationsmanagement GmbH

**Who does the money go to?**
Economic effects of cycle tourism explained using selected German regions
Birte Raduschke and Louise Bößner, Head of Tourism, ADFC

---

**Kontakt**
Allgemeiner Deutscher Fahrrad-Club e.V.
Bundesverband
Mohrenstraße 69
10117 Berlin
Tel: +49 (0) 30 209 14 68-0
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, Pressesprecher und Wirtschaft auf der ITB. Erfahrungen und bestehende Kooperationen bieten neue Perspektiven für die räumliche und touristische Entwicklung.
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

Panel 2

Public survey via ADFC channels

Cycle tourists with ≥ 3 overnight stays

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

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)

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

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

+ 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:

81% digital maps

46% tourist offices

Main online sources:

44% Google Maps

25% komoot
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
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:
- 45%: 20–40 km
- 28%: 40–60 km
- 25%: < 20 km

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

- 2004: 2.4 million
- 2000: 2.0 million

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

- 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

ADFC-Travelbike 2018 Bicycle Travel Analysis
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

Holiday type

65% additional holiday
35% main holiday

When?

Early summer most popular
Cycling holiday season: Apr–Sept

How long?

Ø 8 overnight stays
2/3 up to one week
1/3 longer than one week

When?

Holiday type

65% additional holiday
35% main holiday

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 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

Top 10 of 137 cycle routes

<table>
<thead>
<tr>
<th>Route</th>
<th>Rank</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Elbe Cycle Route</td>
<td>1</td>
<td>9.9</td>
</tr>
<tr>
<td>Weser Cycle Route</td>
<td>2</td>
<td>8.4</td>
</tr>
<tr>
<td>Ruhr Valley Cycle Route</td>
<td>3</td>
<td>6.6</td>
</tr>
<tr>
<td>Main Cycle Route</td>
<td>4</td>
<td>3.7</td>
</tr>
<tr>
<td>Ems Cycle Route</td>
<td>5</td>
<td>3.6</td>
</tr>
<tr>
<td>Rhine Cycle Route</td>
<td>6</td>
<td>3.5</td>
</tr>
<tr>
<td>Danube Cycle Route</td>
<td>7</td>
<td>3.4</td>
</tr>
<tr>
<td>Baltic Sea Cycle Route</td>
<td>8</td>
<td>3.0</td>
</tr>
<tr>
<td>Oder-Neiße Cycle Route</td>
<td>9</td>
<td>2.9</td>
</tr>
<tr>
<td>Mosel Cycle Route</td>
<td>10</td>
<td>2.5</td>
</tr>
</tbody>
</table>

For the 14th time!
## Most popular cycle regions in Germany

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

Top 10 of 171 regions

Growing popularity: Thuringia

in% / ± comparison to 2017
## Most popular cycle routes abroad

<table>
<thead>
<tr>
<th>Rank</th>
<th>Route</th>
<th>In%</th>
<th>Change 2017</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Danube Cycle Route</td>
<td>8.3</td>
<td>+ 0</td>
</tr>
<tr>
<td>2</td>
<td>Via Claudia Augusta</td>
<td>3.1</td>
<td>+ 0</td>
</tr>
<tr>
<td>3</td>
<td>Etsch Cycle Route</td>
<td>2.5</td>
<td>+ 1</td>
</tr>
<tr>
<td>4</td>
<td>Alpe Adria Cycle Route</td>
<td>2.1</td>
<td>+ 5</td>
</tr>
<tr>
<td>5</td>
<td>North Sea Cycle Route</td>
<td>1.9</td>
<td>- 2</td>
</tr>
<tr>
<td>6</td>
<td>Munich-Venice Cycle Route</td>
<td>1.4</td>
<td>NEW</td>
</tr>
<tr>
<td>7</td>
<td>Lake Constance Cycle Route</td>
<td>1.1</td>
<td>NEW</td>
</tr>
<tr>
<td>8</td>
<td>Berlin-Copenhagen Cycle Route</td>
<td>1.1</td>
<td>- 1</td>
</tr>
<tr>
<td>9</td>
<td>Elbe Cycle Route</td>
<td>1.1</td>
<td>- 4</td>
</tr>
<tr>
<td>10</td>
<td>Baltic Sea Cycle Route</td>
<td>1.0</td>
<td>+ 0</td>
</tr>
</tbody>
</table>

### Trend: Alp crossings

<table>
<thead>
<tr>
<th>Rank</th>
<th>Route</th>
<th>In%</th>
<th>Change 2017</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Danube Cycle Route</td>
<td>8.3</td>
<td>+ 0</td>
</tr>
<tr>
<td>8</td>
<td>Berlin-Copenhagen Cycle Route</td>
<td>1.1</td>
<td>- 1</td>
</tr>
</tbody>
</table>

### In% / + comparison to 2017

Top 10 of 77 destinations

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

Top 10 of 136 regions

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

<table>
<thead>
<tr>
<th>Rank</th>
<th>Region</th>
<th>Rank to 2017</th>
<th>Change to 2017</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Netherlands</td>
<td>1</td>
<td>± 0</td>
</tr>
<tr>
<td>2</td>
<td>South Tyrol</td>
<td>± 0</td>
<td></td>
</tr>
<tr>
<td>3</td>
<td>Alps</td>
<td>+ 1</td>
<td></td>
</tr>
<tr>
<td>4</td>
<td>Mallorca</td>
<td>± 0</td>
<td></td>
</tr>
<tr>
<td>5</td>
<td>Austria</td>
<td>- 2</td>
<td></td>
</tr>
<tr>
<td>6</td>
<td>France</td>
<td>± 0</td>
<td></td>
</tr>
<tr>
<td>7</td>
<td>Italy</td>
<td>± 0</td>
<td></td>
</tr>
<tr>
<td>8</td>
<td>Lake Garda</td>
<td>- 2</td>
<td></td>
</tr>
<tr>
<td>9</td>
<td>Denmark</td>
<td>± 0</td>
<td></td>
</tr>
<tr>
<td>10</td>
<td>Tyrol</td>
<td>NEW</td>
<td></td>
</tr>
</tbody>
</table>

in% / ± comparison to 2017
Plan for 2018: travel destinations in Germany

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

Top 10 of 242 destinations

Multiple routes available

in % / ± comparison to 2017
## Plan for 2018: travel destinations abroad

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

*in% / ± comparison to 2017*

Multiple routes available
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!
Donnerstag, 08.03.2018 | Fachbesuchertag

**16.00-17.00 Uhr**
CityCube Berlin, Raum A7

Die ADFC-Travelsbike-Radrouteanalyse 2018
Aktuelle Zahlen und Trends


Referenten:
Louise Bößler und Frank Hofmann, ADFC

---

Freitag, 09.03.2018 | Cycle Tourism Day

The benefits of cycling tourism for tourism destinations

Cycle 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 Feld, Deputy National Chairmanwoman, ADFO BTC, World Tourism Organisation
Eduardo Santander, Executive Director, European Travel Commission
Adrian Bössler, Advocacy and EuroVelo Director, ECF

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 took at different aspects of product development – from route infrastructure to marketing and monitoring.

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

Panel discussion, chaired by Ed Lancaster, ECF

Draw Cycle Path:
Quality and coordination as keys to success

Paco Weisbach, Project Manager Cycling / Kämper Werbeagentur & Innovationsmanagement GmbH

Who needs the money? -
Economic effects of cycle tourism explained using selective German regions

Bößler Radbiorad und Louise Bößler, Head of Tourism, ADFC