

# ADFC Bicycle Travel Analysis

for the 2021 cycling year



## **Publisher**

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## **About the ADFC**

With more than 200,000 members, the German National Cyclists' Association (ADFC) is the largest interest group for cyclists in Germany and worldwide. It advises on all cycling-related matters: legislation, technology, and tourism. The ADFC is politically active on the regional, national, and international levels for the consistent promotion of cycling and cycle tourism.

Berlin, March 2022

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## Methodology

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For the ADFC Bicycle Travel Analysis, a cycle tourist has been defined as follows:

»A cycle tourist is someone who has gone on at least one trip lasting at least three nights in the past three years during which cycling was one of the main motives.«

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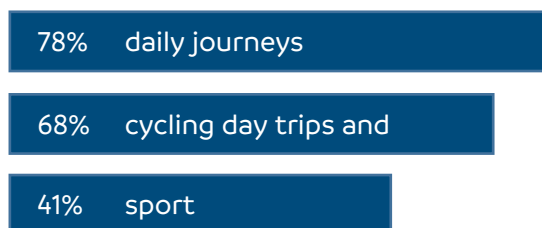
The data for the ADFC Bicycle Travel Analysis is collected between **November and January** during online surveys. A portion of the data is generated through two closed national representative panels; the other portion is obtained during an open survey published via the ADFC's communication channels.

The two closed panels collect nationally representative data on bicycle usage in general and the proportion of day trippers and cycle tourists (n=2,963). The data from the open survey provides a comprehensive basis for analysis of the specific characteristics of bicycle tourists (n=7,306). A total of **10,269 evaluable questionnaires** were available.

## Cycling in general

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**82%** of Germans cycle occasionally to regularly.



**24%** bought a new bicycle in 2021. Almost half of the new bicycles purchased were an e-bike (49%).

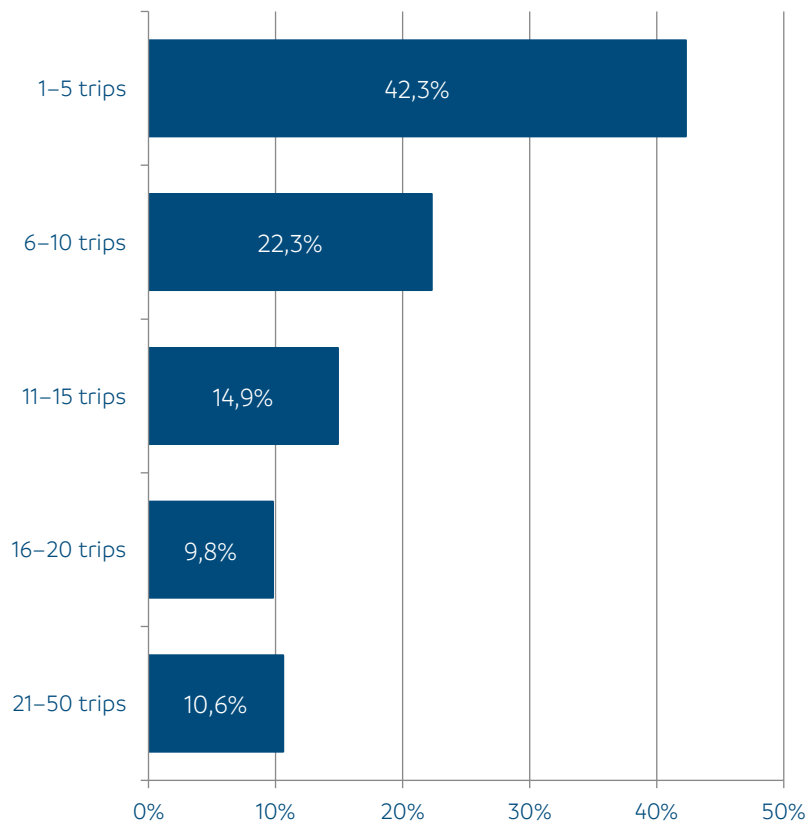
## Day trips

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Around **41.6 million** people went on at least one cycling day trip in 2021 (+ 11 million).

How many cycling day trips did you go on in 2021?

(Only respondents who went on at least one cycling day trip; n=1,516)



$\emptyset = 10.6$

Of those who went on at least one cycling day trip, each completed an average of 10.6 cycling day trips in 2021.

In total, around **441 million** cycling day trips were completed in 2021.



**59%** of cyclists started their cycling day trip from home and 41% from another starting point.



When they started their trip from somewhere other than home, **67%** of cycle tourists travelled to their starting point by car, 24% by train and 9% using public transport.



**39%** drove **20-40 km** to reach their starting point and 33% drove 40-60 km.



**82%** planned their cycling route themselves and 18% cycled an existing route that had been suggested to them.




**2%** used a hire bike for their cycling day trip.

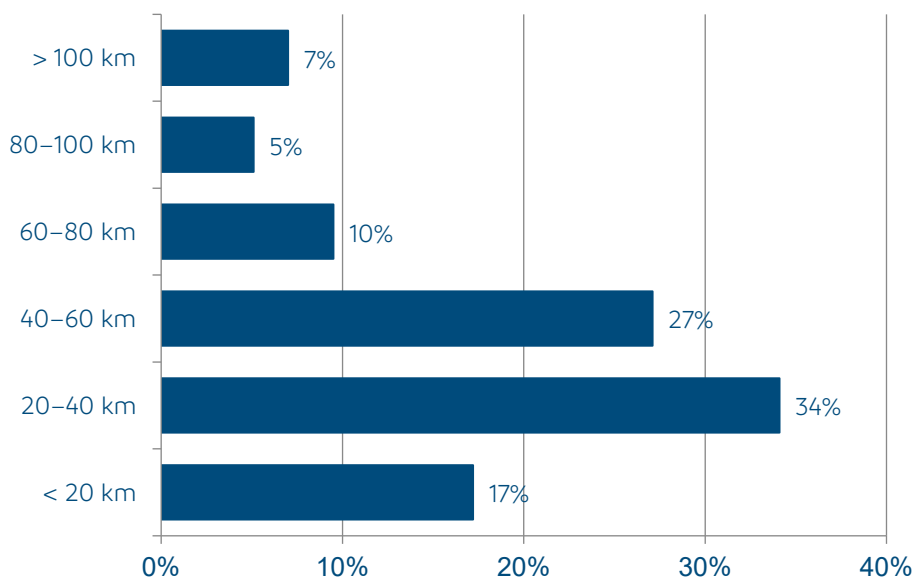
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The following aspects were particularly important when **planning a cycling day trip**:

-  70% route navigability (e.g. route surface and width)
-  66% traffic safety (e.g. separate route for cyclists with less traffic)
-  57% sights/attractions along the route
-  40% gastronomic offers
-  29% easy topography, flat route
-  22% accessibility using public transport
-  20% route's thematic design
-  12% challenging topography, hilly sections

How many kilometres did you cycle during your day trip(s)?  
(Only respondents who went on at least one cycling day trip; n=8,657)

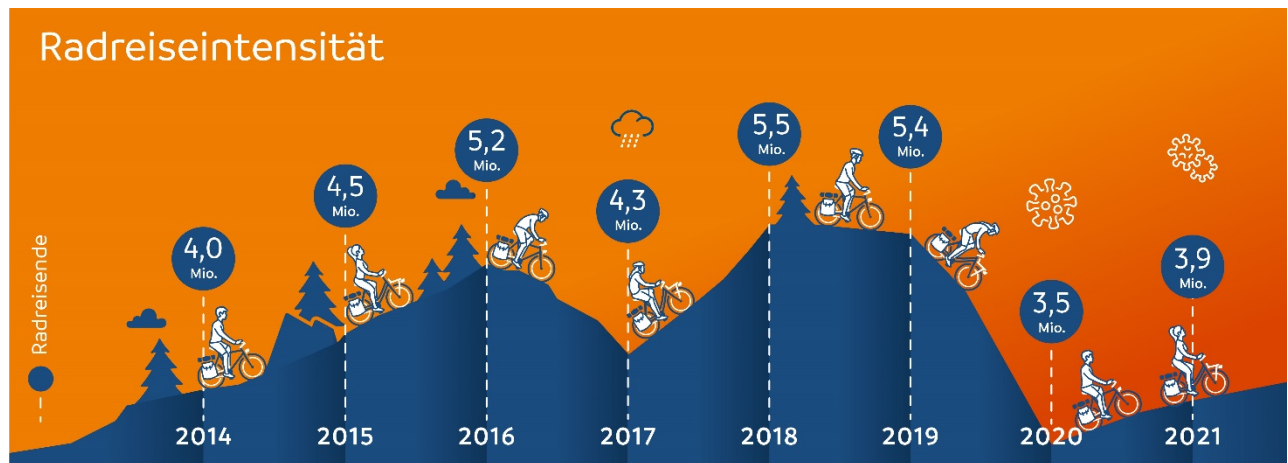


**Ø = 43 km**  
Cycling day trips were an average of 43 km in length.

## Cycle tourism

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Around **4 million** people went on a cycling trip in 2021. While this represents an increase of 0.5 million compared to the previous year, this total doesn't come anywhere close to the number of trips completed in 2019.

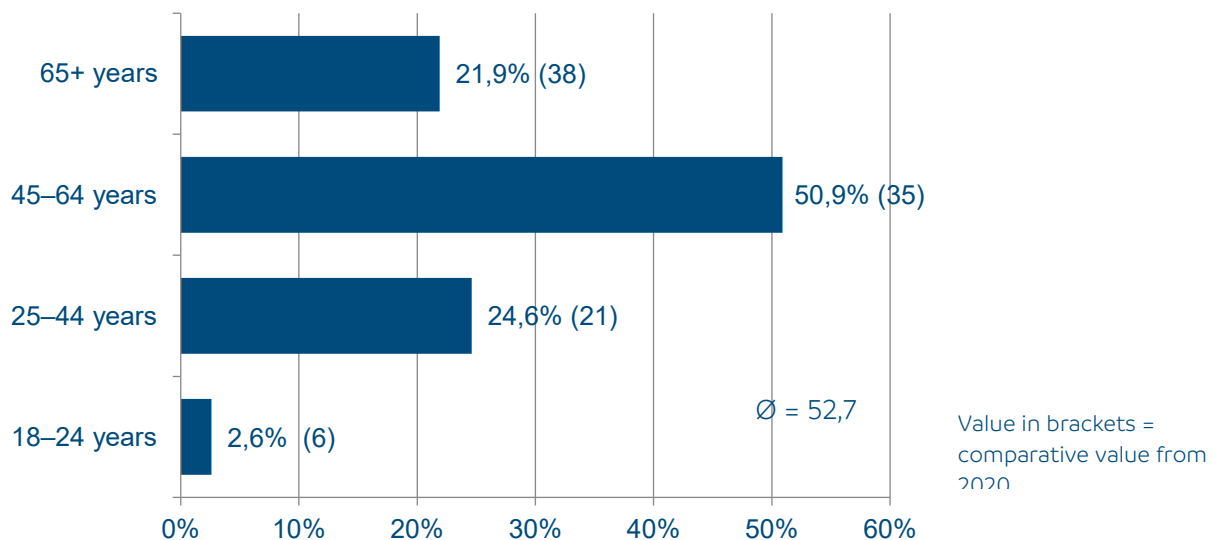


Number of cycling trips © ADFC/april Agentur

### Cyclists are ...



- ... 60% male
- ... 40% female
- ... an average of 53 years old.



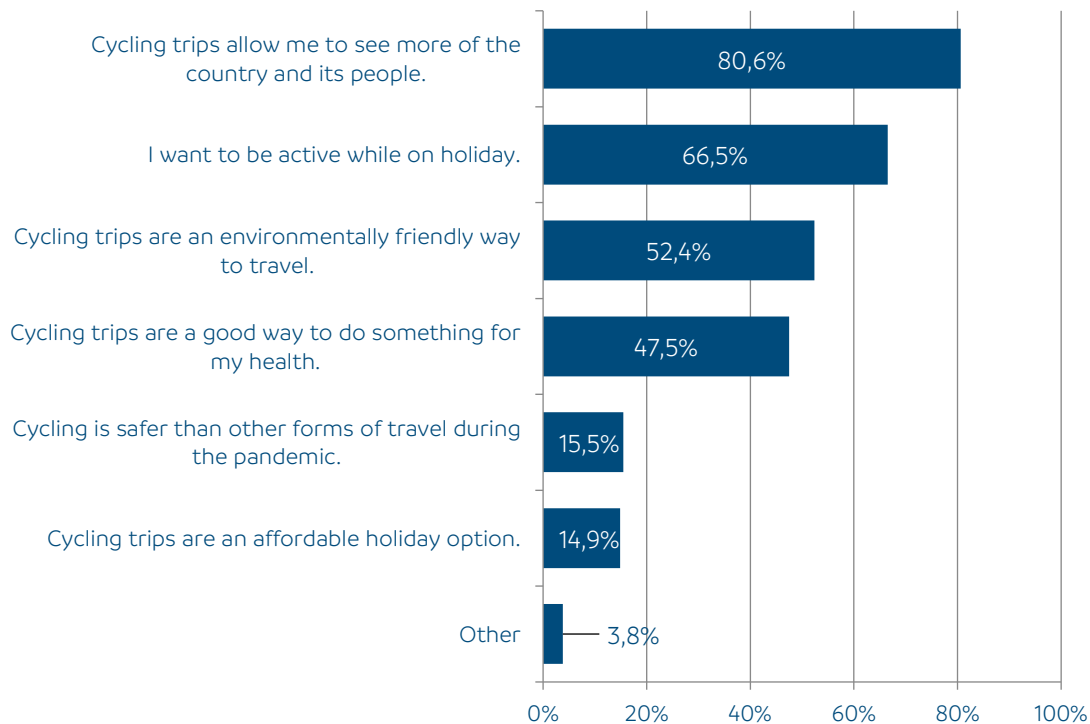
**Travel companion:** 56% travelled with their spouse/partner and 30% with friends. 18% travelled alone and 8% with children/youths.

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## Motives for a cycling trip

What were the three main reasons for you deciding to go on a cycling trip?  
 (Cycle tourists: n=5,622)



The following aspects were particularly important when **planning cycling trips**:

-  71% sights/attractions along the route
-  70% traffic safety (e.g. separate routes with less traffic)
-  66% route navigability (e.g. route surface and width)
-  61% cyclist-friendly accommodation
-  48% gastronomic offers
-  37% accessibility using public transport
-  32% easy topography, flat route
-  30% route's thematic design
-  17% challenging topography
-  13% cycling services along the cycle route, e.g. charging stations, repair/maintenance, bike hire services

In terms of the **travel period**, there has been a shift towards high summer in recent years. In 2017–2019, most people started their cycling trip in April, May or June. In 2020 and 2021, there was a clear shift towards July, August and September.

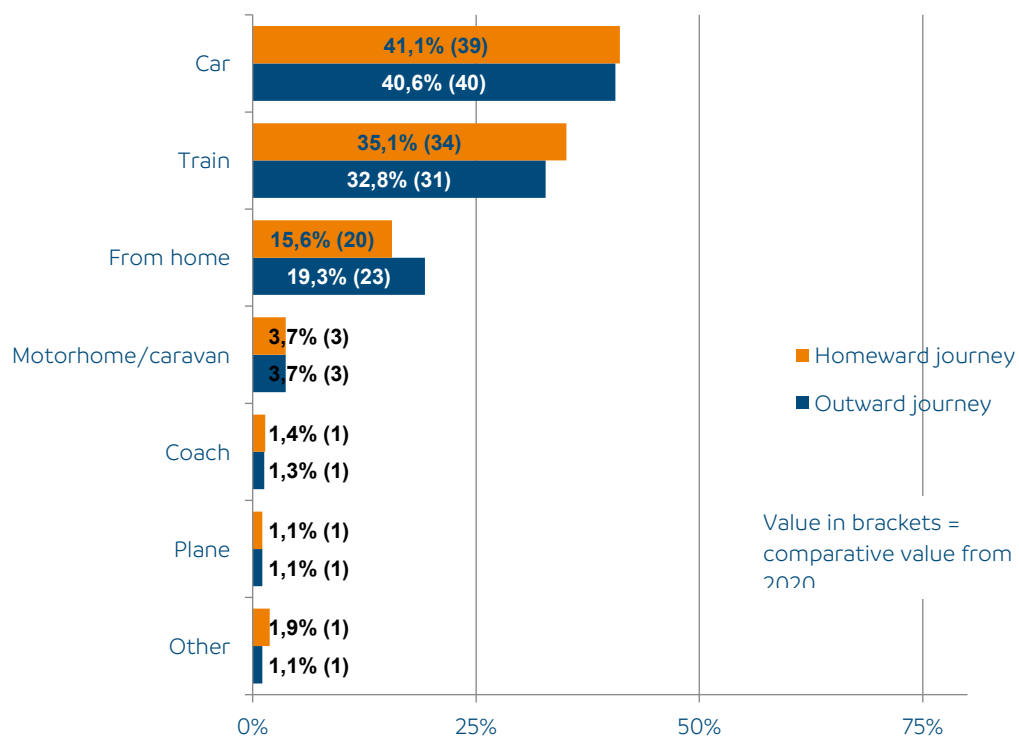
In 2021, the **travel decision** was made further in advance again. The uncertainty due to the pandemic led cycle tourists to book cycling trips at relatively short notice in 2020. In 2021, this period shifted further forward again. A certain amount of uncertainty remains nonetheless. 25% of cyclists decided whether to go on their cycling trip between one week and one month prior to departure, 17% two months prior to departure and 14% three months prior to departure.

In terms of **travel organisation**, 89% organised their cycling trip entirely for themselves and 11% sought assistance from a tour operator.

### Travel to and from the cycling destination

41% of cyclists travelled to the starting point for their trip by car and 33% by train. For 58% of the cyclists who used public transport, the journey was problem-free. Of those who found their journey by train particularly problematic, 64% criticised the **lack of space for transporting bicycles**, 50% the **cyclist-unfriendly stations** and 45% the **inconvenient bicycle parking facilities**. Train cancellations and delays were also criticised.

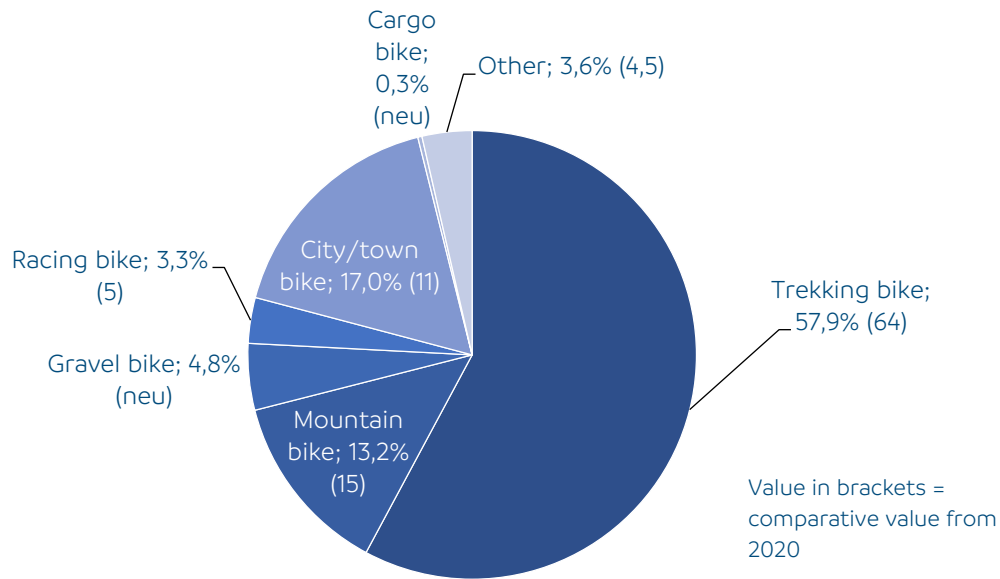
How did you get to the starting point for your cycling trip? And how did you get home again?  
(Cycle tourists: n=3,788)



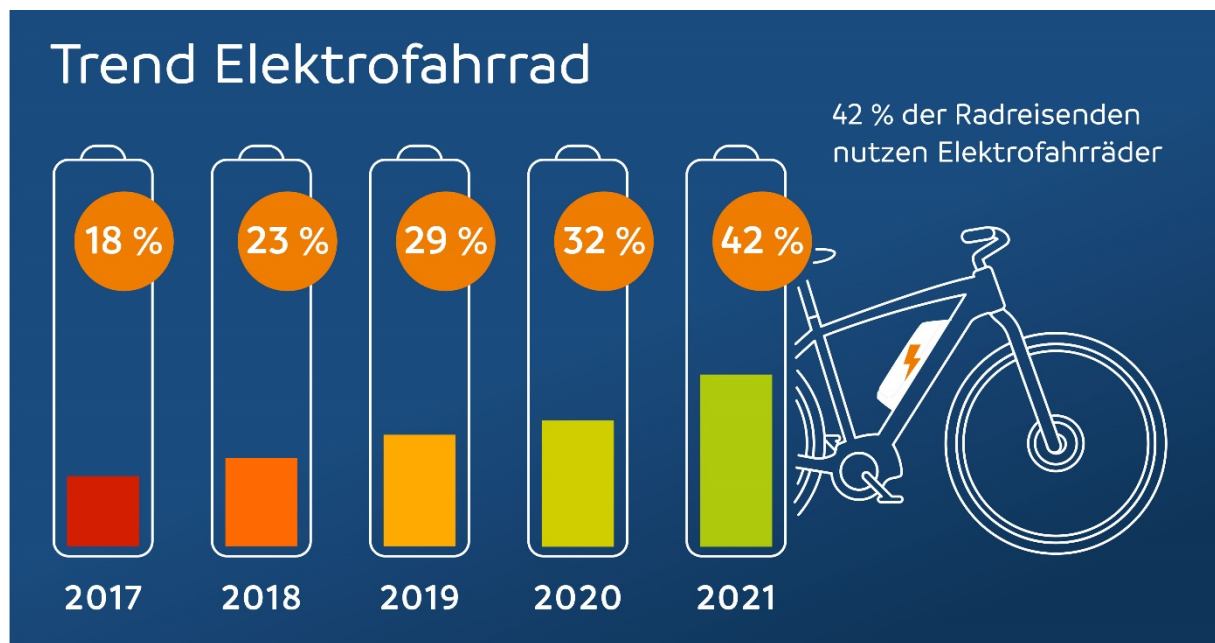
31% also used other means of transport during their cycling trip. 57% used the train for point-to-point tours and 35% for circular tours. 7% of cycle tourists used a **special bike bus**, also increasingly during circular tours.



## Bicycle types during the cycling trip



3.5% of cyclists used a hire bike during their cycling trip. E-bikes continue to grow in popularity. In 2021, 42% of cycle tourists used an e-bike.

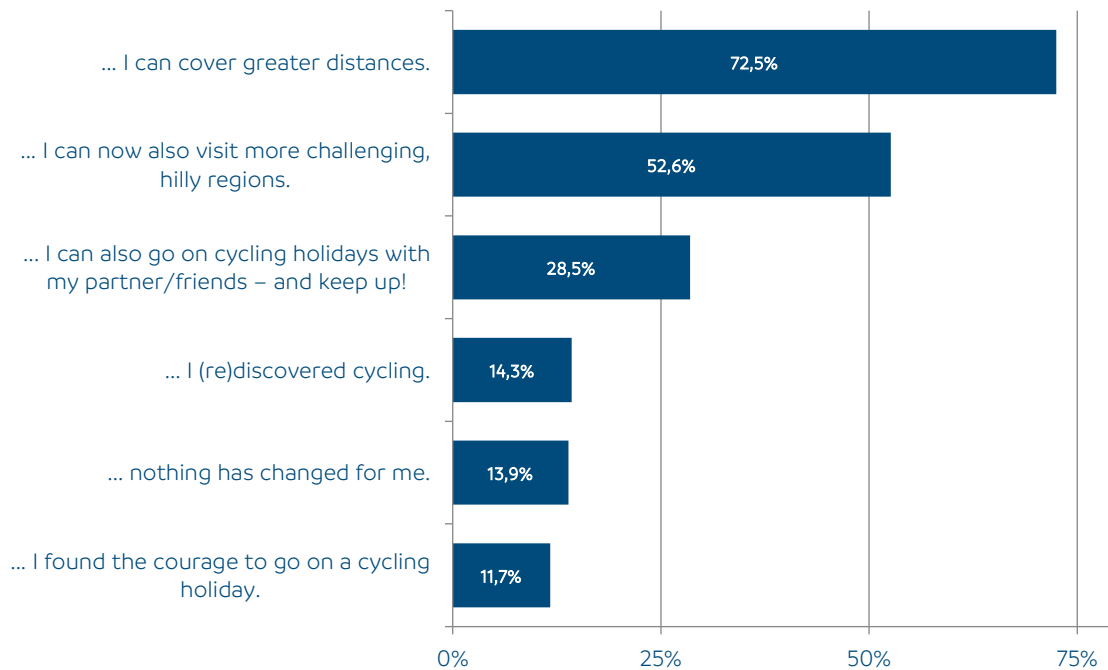


Use of e-bikes by cycle tourists © ADFC/april Agency

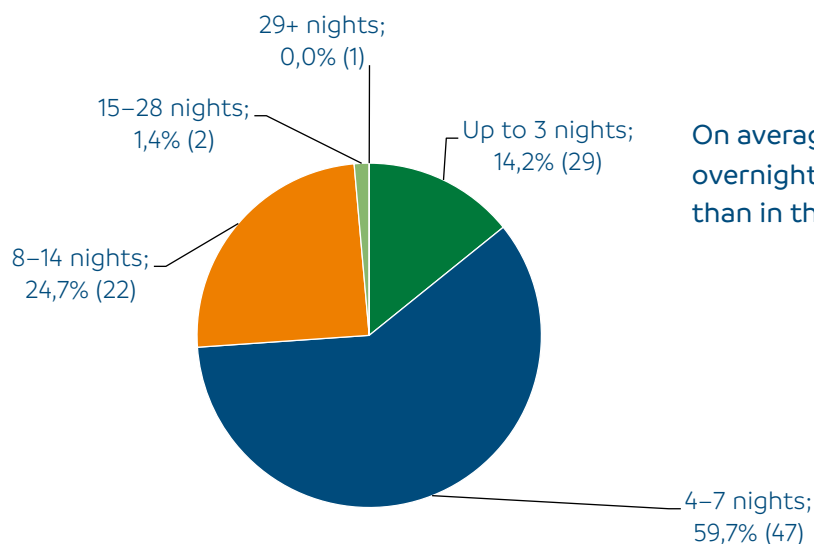
## Reasons for using an e-bike

Why did you choose to use an e-bike? Please select the statements that apply.  
(Cyclists who used an e-bike; n=1,019)

Using an e-bike means ...

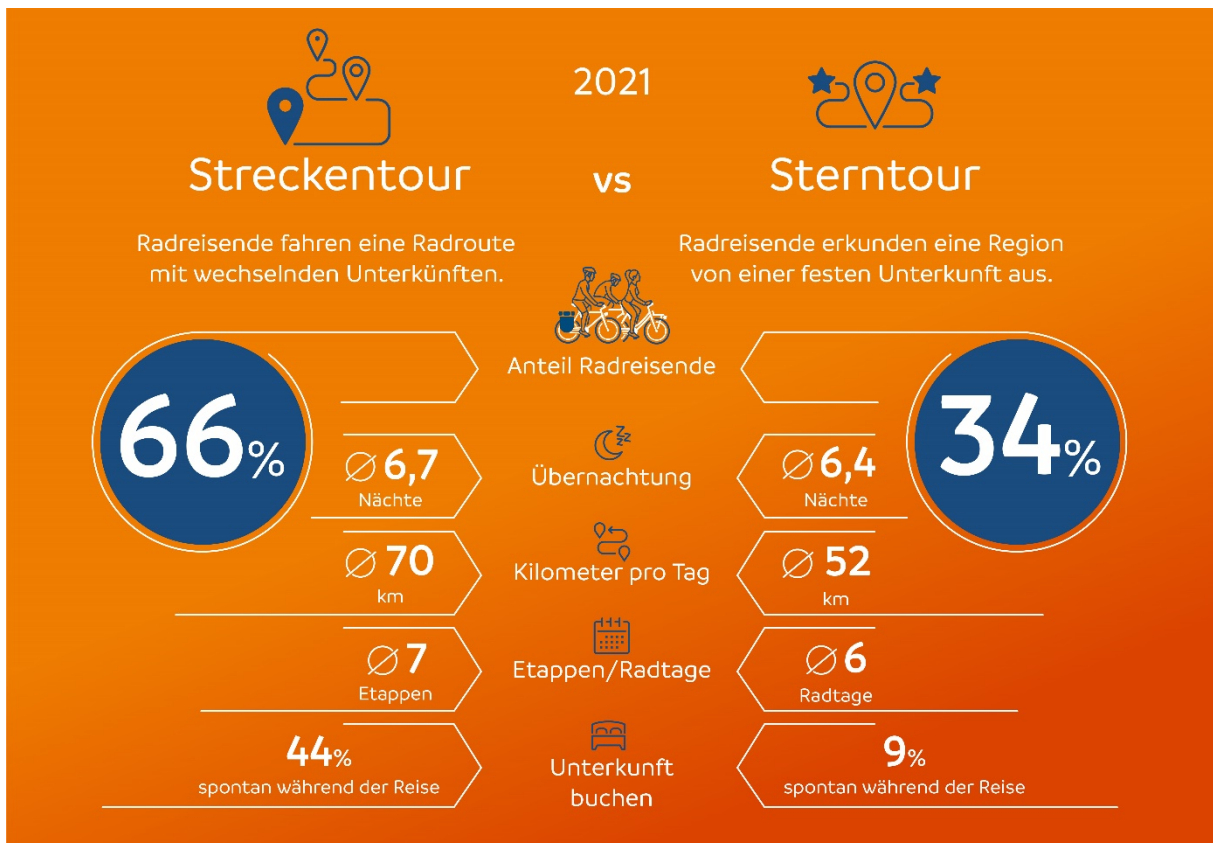


## Trip duration



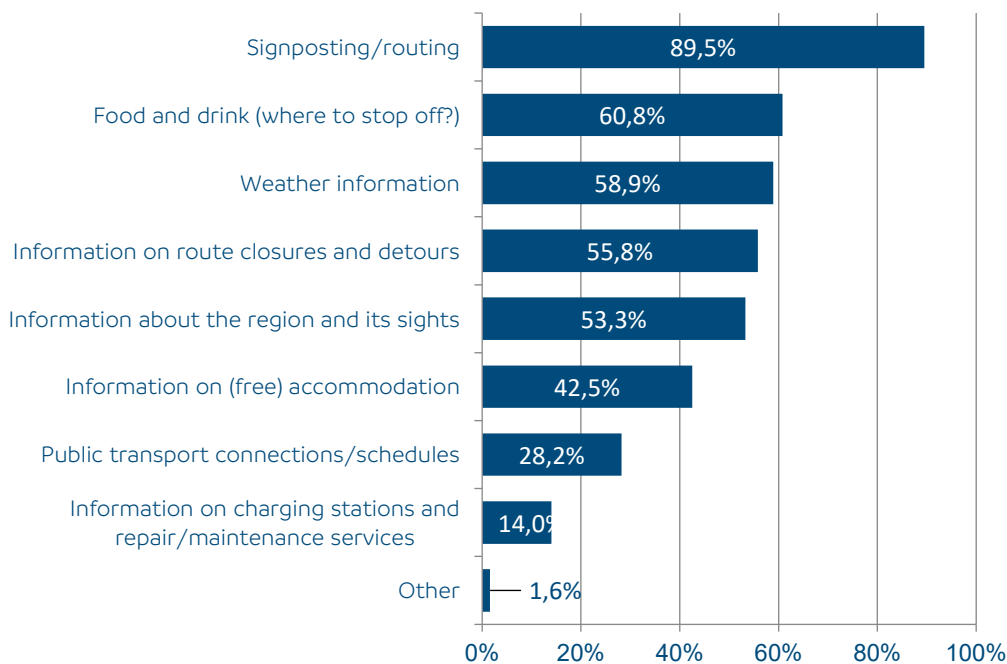
On average, trips involved **6.6** overnight stays, so slightly more than in the previous year (6.0).

## Route/tour length



Point-to-point tours vs. circular tours © ADFC/april Agentur

## What kinds of information do cycle tourists need while on the road?

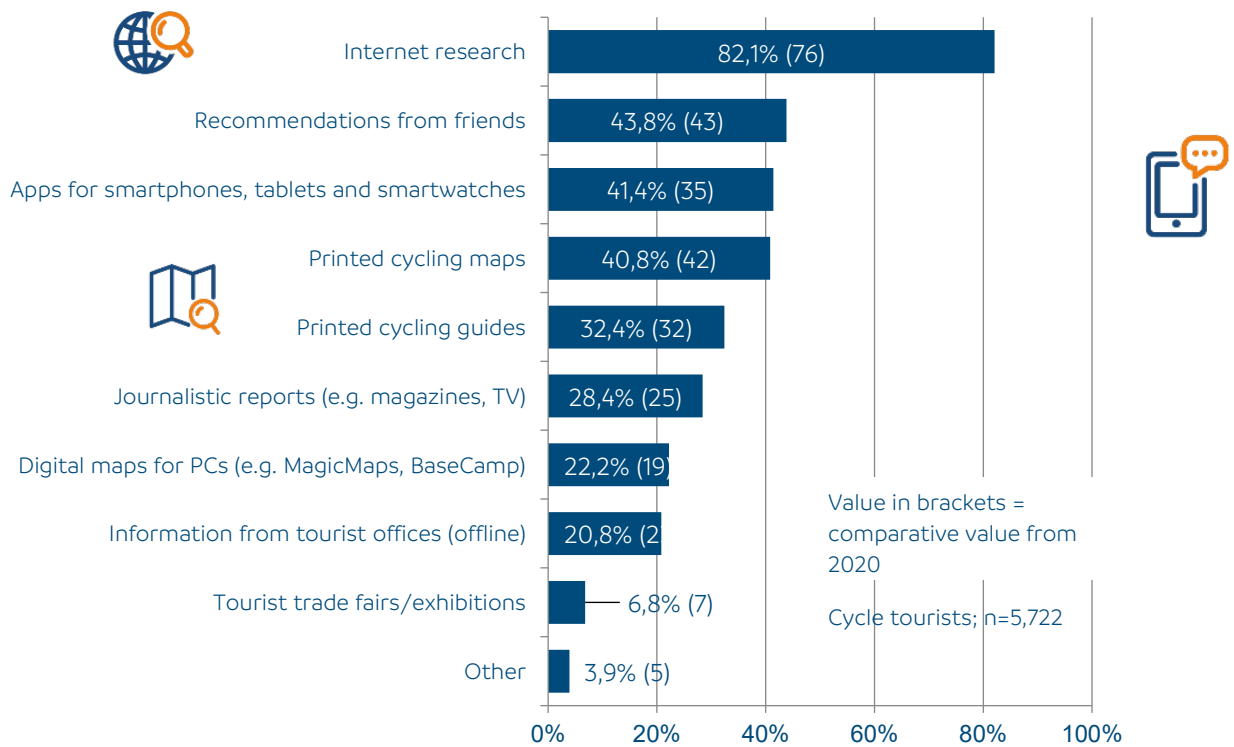


(Cycle tourists: n=5,647)

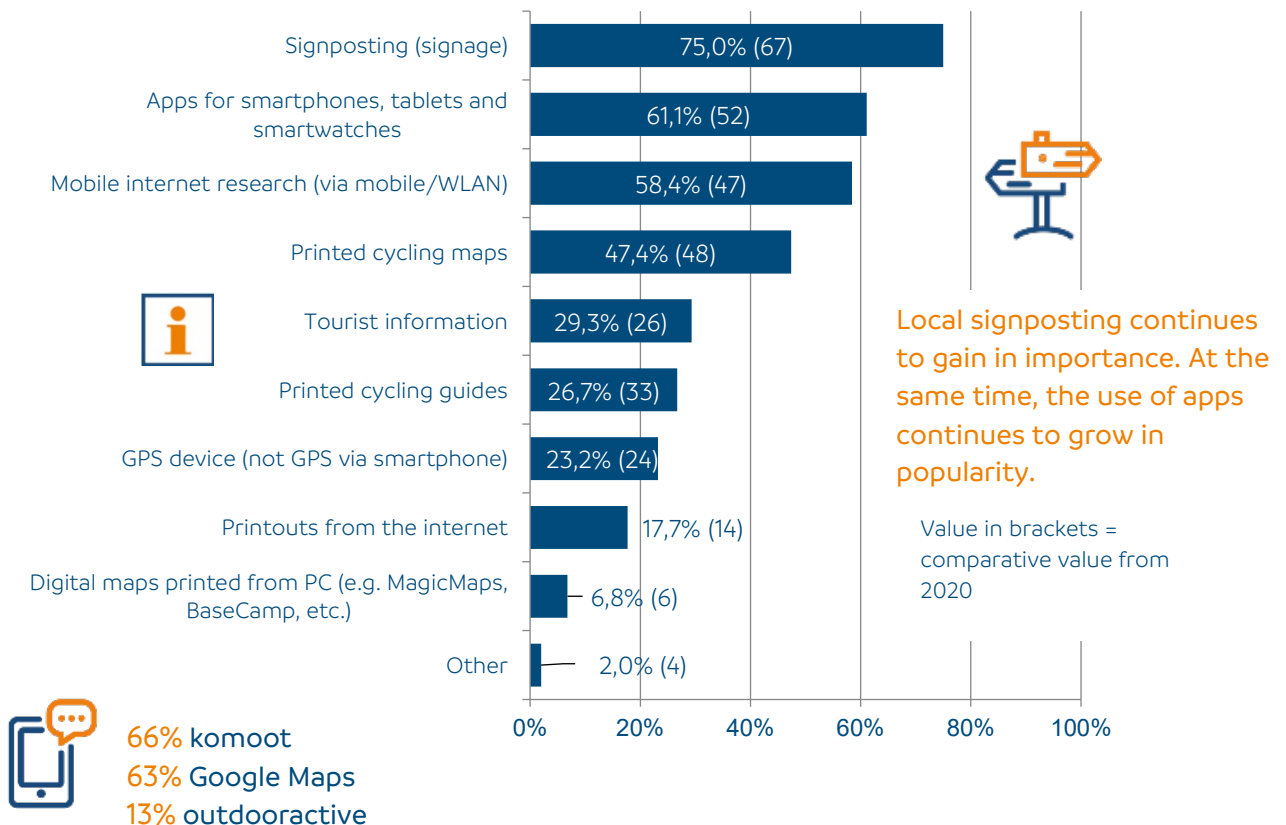
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## Sources of information during trip preparation



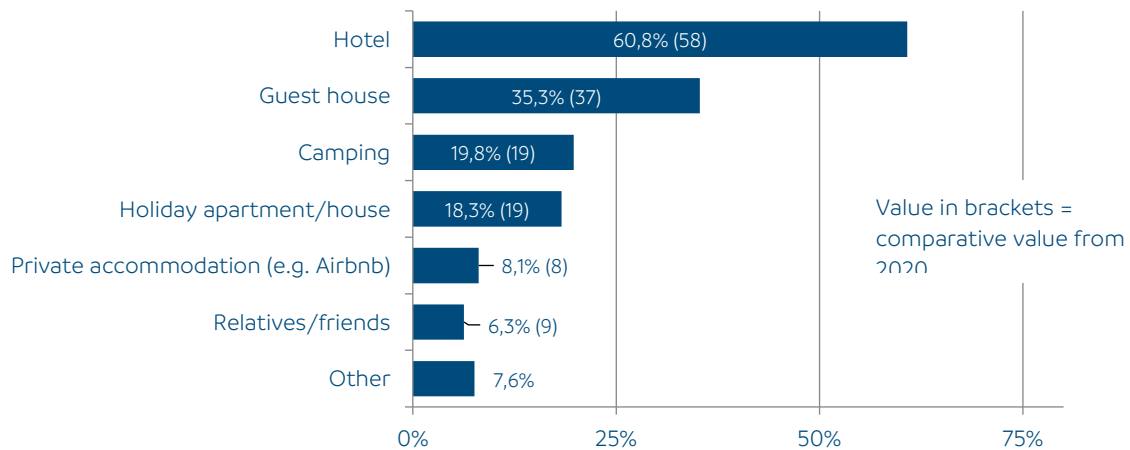
## Sources of information during cycling trips



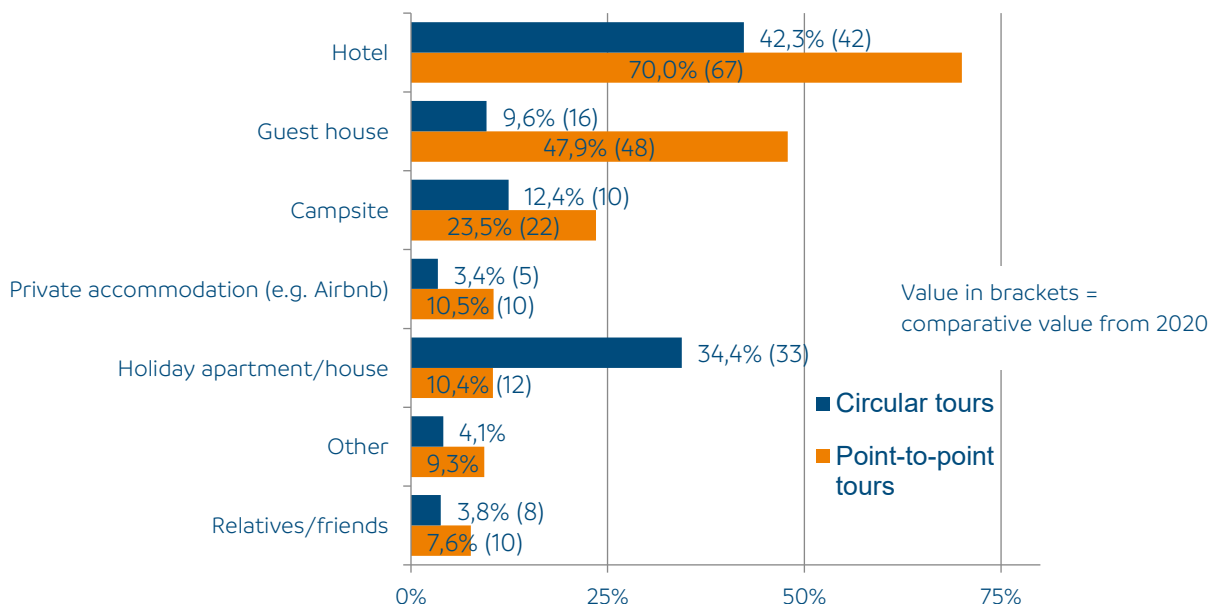
## Accommodation during cycling trips

68% of cycle tourists booked their accommodation before their trip and 32% spontaneously during their trip.

What type(s) of accommodation did you use during your cycling trip(s)?  
(Cycle tourists: n=3,513)



A closer look at the two target groups reveals that holiday apartments/houses are the second most popular option among cycle tourists on a **circular tour** (34%). In terms of when they booked their accommodation, 91% booked before they went on their trip. Hotels and guest houses were the most popular options among cycle tourists on **point-to-point tours**. 56% of cycle tourists booked their accommodation before their trip and 44% spontaneously during their trip.



The following aspects were particularly important to cyclists when choosing accommodation: **location/access** (76%), **price-performance ratio** (69%) and **cyclist-friendly facilities and services** (40%). 85% of cycle tourists were satisfied with the quality of their accommodation.

## TOP destinations in 2021



78% of cycle tourists spent their holidays in Germany and 22% went abroad.

### TOP 5 abroad

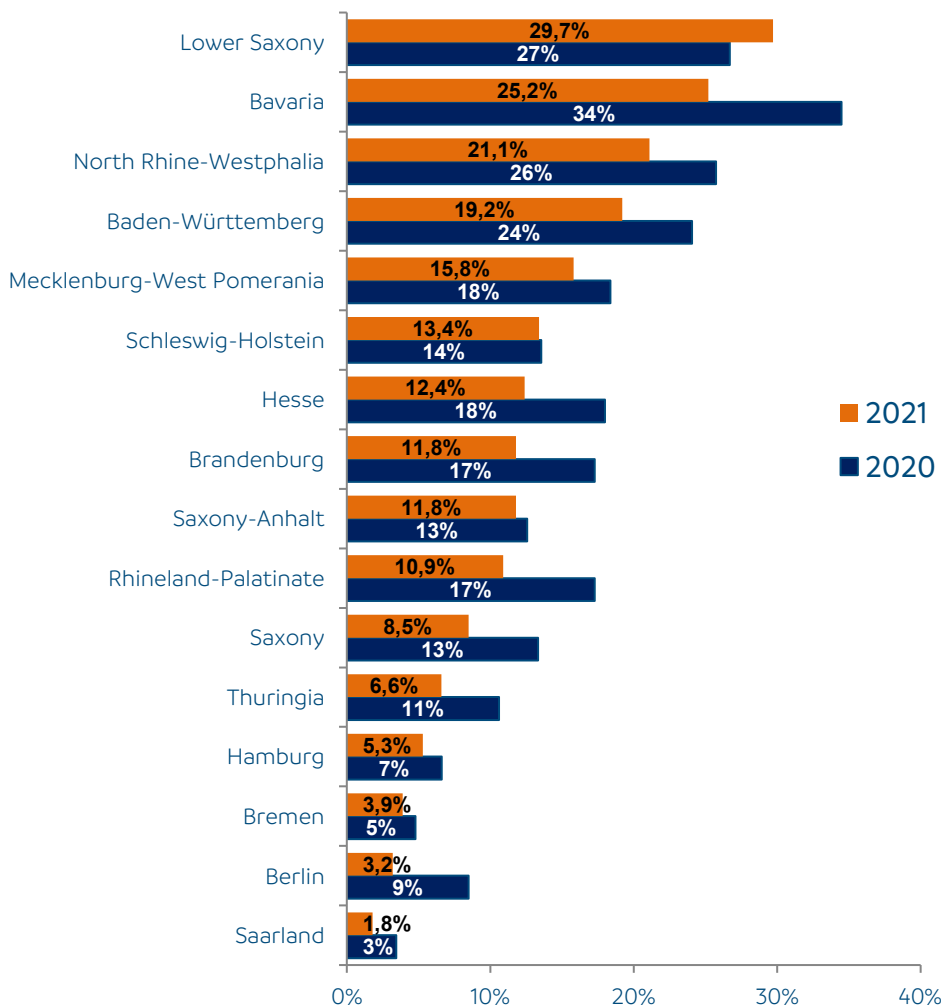
1. Austria (36%) | 2. Italy (33%) | 3. France (14%) | 4. Netherlands (11.2%) | 5. Switzerland (11.1%)

70% of cycle tourists cycled the route/region for the first time. For 30%, it wasn't the first time they cycled the route/region.

84% would recommend their destination from 2021.

## TOP federal states in 2021

Which German federal states did you cycle in?  
(Cycle tourists in Germany: n=2,780)



In 2021, there were the most cycle tourists on the road in Lower Saxony.



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## TOP cycling regions in 2021

In 2021, the most popular region for cycle tourism was **Osnabrücker Land | Emsland | Grafschaft Bentheim**, followed by the Mecklenburg Baltic Sea coast and the Lake Constance region. NB: The section of the North Sea coast ranked sixth is in Lower Saxony.



TOP 10 cycling regions in 2021 © ADFC/april Agentur

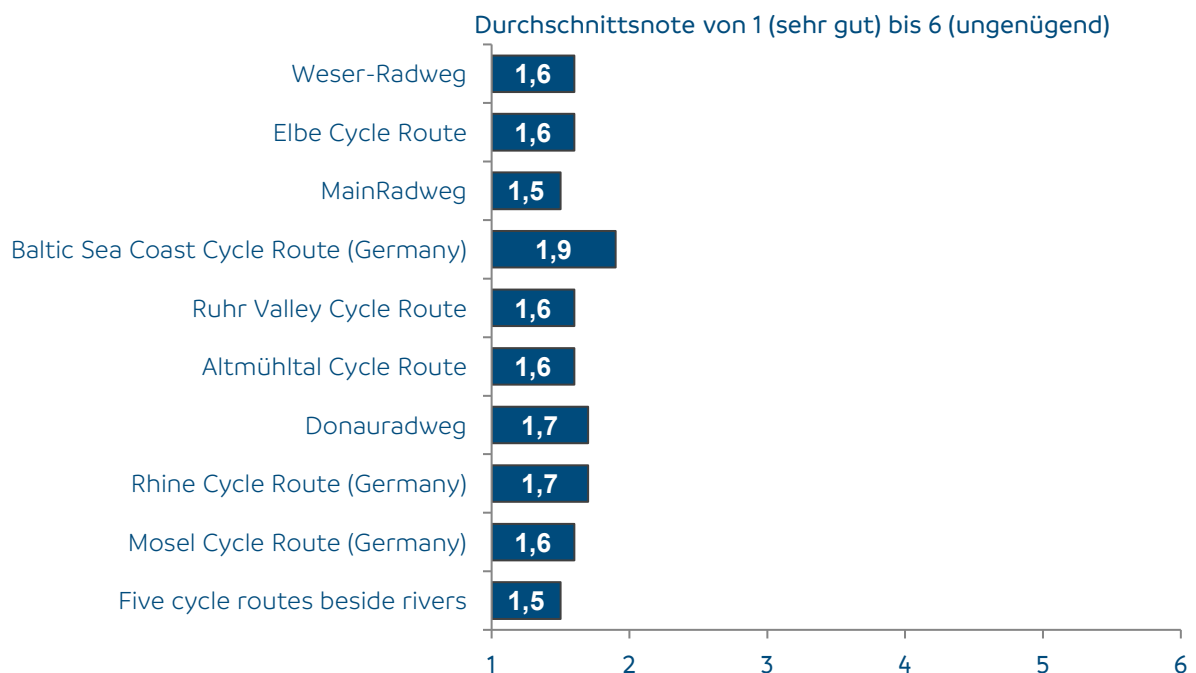
## TOP long-distance cycle routes in 2021

In 2021, the **Weser Cycle Route** was the most popular long-distance cycle route, followed by the Elbe Cycle Route and the Main Cycle Route.



TOP 10 long-distance cycle routes in 2021 © ADFC/april Agentur

## Satisfaction with the long-distance cycle routes travelled



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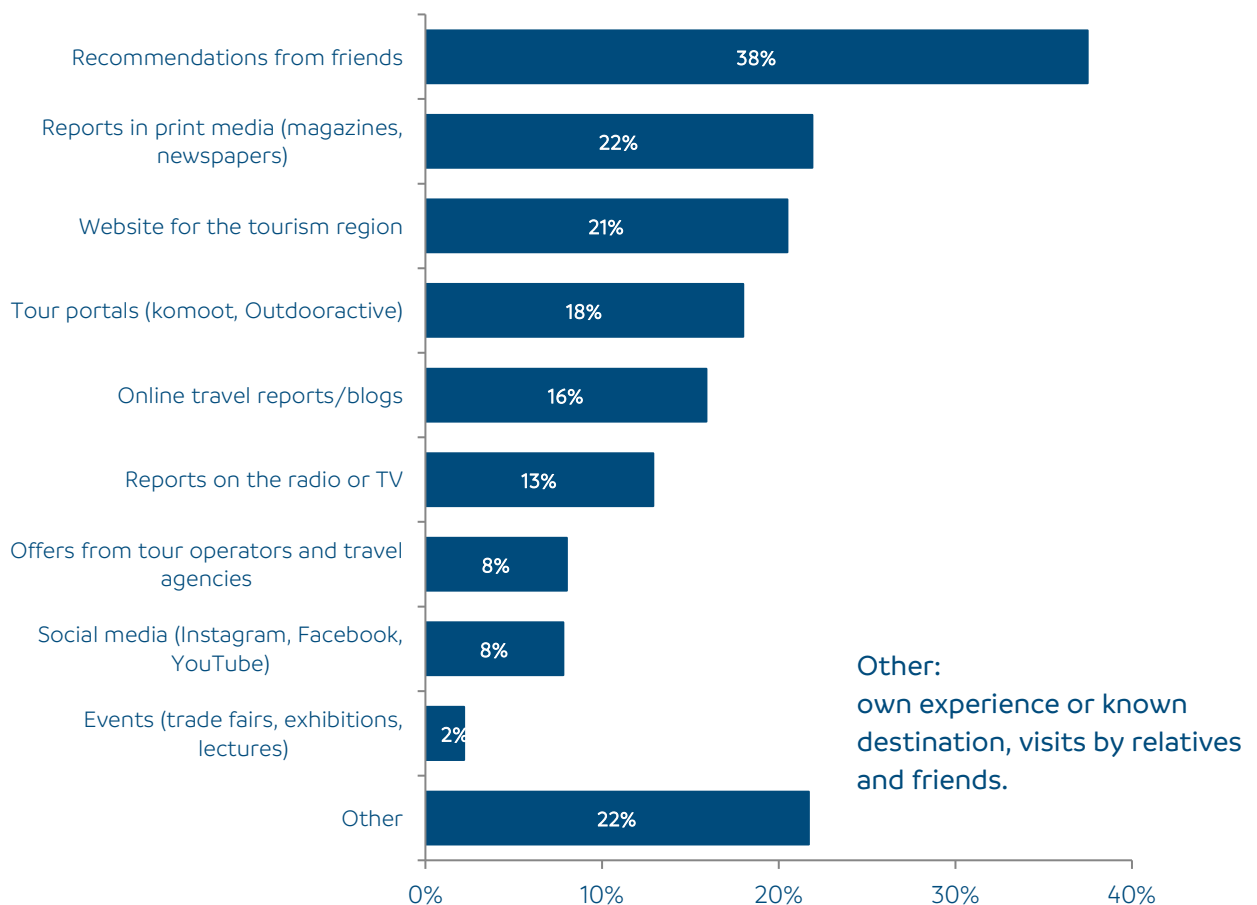
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In addition to the question about the travel destinations in 2021, the Bicycle Travel Analysis also asked which long-distance cycle route cycle tourists liked the best **in the past three years**. The Weser Cycle Route also took first place here – followed by 2. Elbe Cycle Route | 3. Ruhr Valley Cycle Route & Danube Cycle Route | 4. Baltic Sea Coast Cycle Route | 5. MainRadweg | 6. Lake Constance Cycle Route | 7. Altmühltal-Radweg | 8. Mosel Cycle Route | 9. Lake Constance-Königsee Cycle Route and 10. Rhine Cycle Route.

When asked which federal state cycle tourists prefer to spend their cycling holidays in, Bavaria placed first – followed by 2. Lower Saxony | 3. Mecklenburg-West Pomerania | 4. North Rhine-Westphalia | 5. Baden-Württemberg | 6. Brandenburg | 7. Rhineland-Palatinate | 8. Schleswig-Holstein | 9. Hesse and 10. Saxony.

How did you first hear about your destination?  
(Cycle tourists: n=3,549)



### Outlook for the 2022 cycling year

68% of cycle tourists are planning a cycling trip in 2022, 28% are still undecided. 76% are planning a cycling trip in Germany and 26% in Europe.