

2017 ADFC-Travelbike Bicycle Travel Analysis

18th national survey on the bicycle travel market



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:



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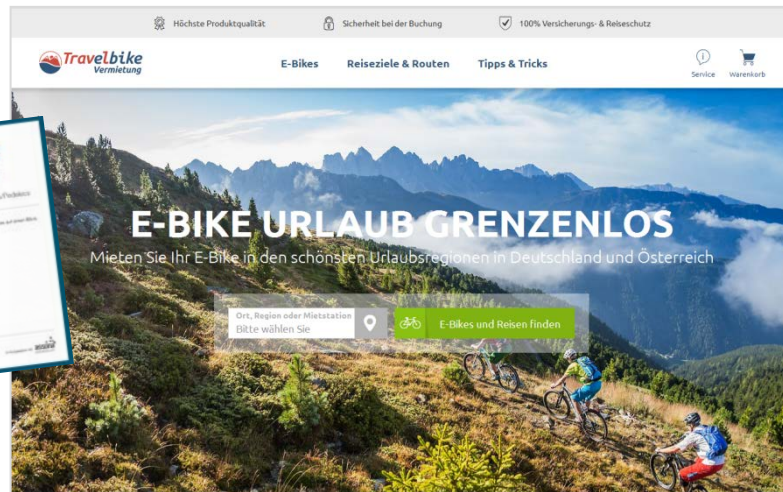


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2017 ADFC-Travelbike Bicycle Travel Analysis

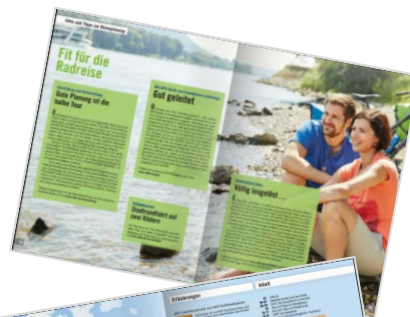


The ADFC cycling trip planner: Discover Germany by Bike

NEW website: www.deutschland-per-rad.de



Inspiration and advice



Strong partners



Bett+Bike bicycle-friendly hosts

5,800 bicycle-friendly hosts

in Germany, Belgium, Denmark, Luxembourg and Austria



Website

App



2017 ADFC-Travelbike Bicycle Travel Analysis

ADFC data basis

- Complete survey by a neutral service provider

Dual approach:

- Representative national online panel
- Public survey via the ADFC/Travelbike websites, social media channels

Response:

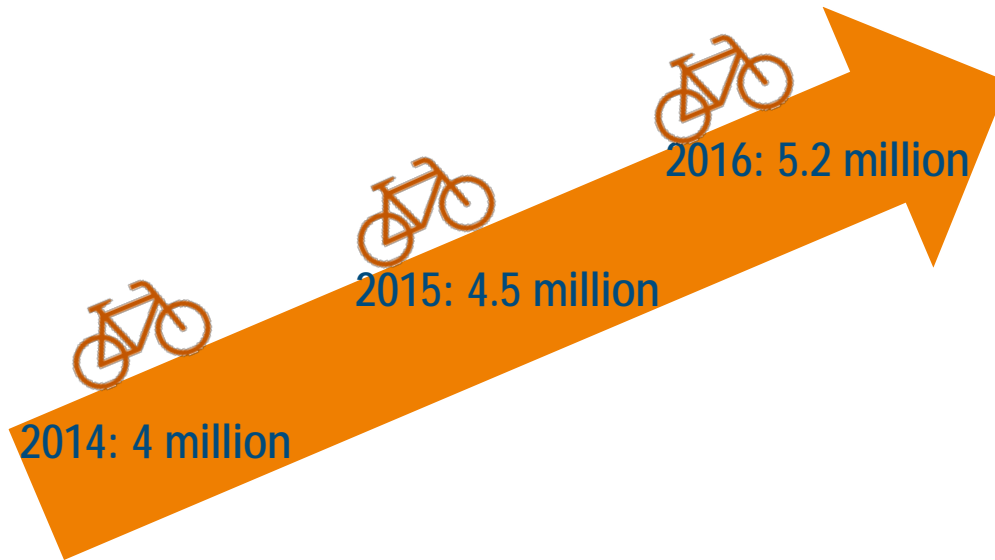
- Online panel: 3,752 people of which 1,105 completed at least one cycling trip between 2014–2016 with at least 3 overnight stays (= definition of a cycle tourist)
- Public survey: 3,257 people of which 2,587 were cycle tourists

Adjustment of the random samples using a weighting procedure to prevent any dominance by ADFC members/participants close to the ADFC



Development of German cycle tourism

Cycle tourism, a holiday segment experiencing dynamic growth!



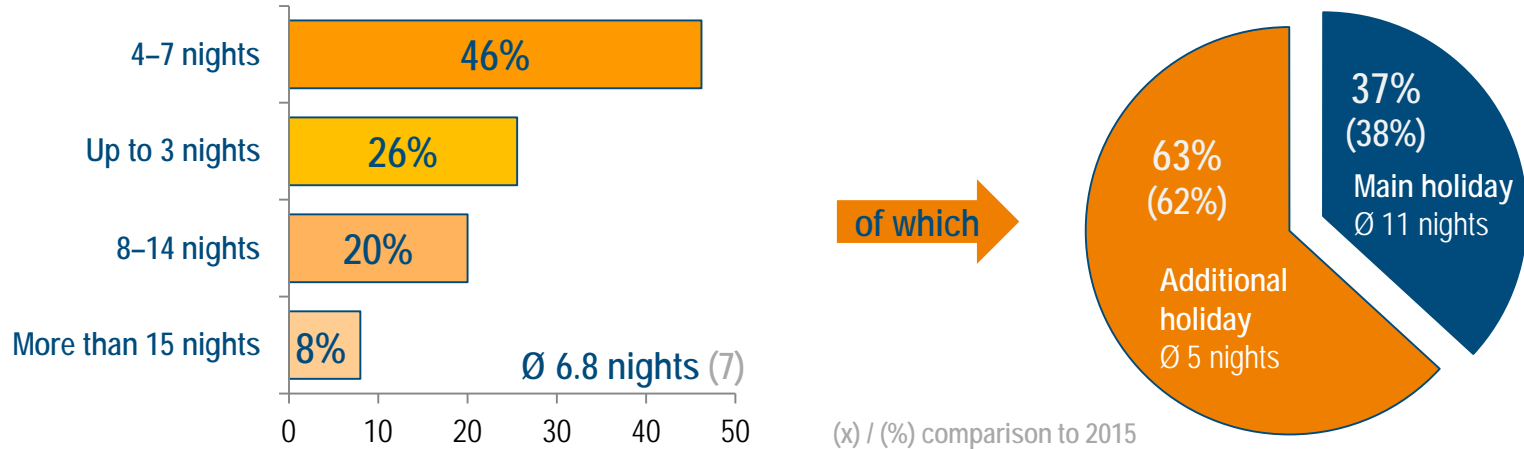
+30% increase in cycle tourists since 2014

2016:
150 million day trips by bike

Please indicate in the following overview how many cycling tours/trips you completed in 2016: cycling trips with at least three overnight stays (n = 1,087; online panel only)

Duration of cycling trips

- 72% of cycle tourists completed one cycling trip with at least 3 overnight stays in 2016 (78%)
- Two thirds of cycling trips are additional holidays with an average of 5 overnight stays
- Cycling trips with 4–7 overnight stays were most popular



Please indicate in the following overview how many cycling tours/trips you completed in 2016: cycling trips with at least three overnight stays (n = 1,087; online panel only)

We would now like to know a little more about your longest cycling trip in 2016. How many overnight stays did it involve? (n = 3,075) / Was this cycling trip your main holiday in 2016? (n = 3,153)

Circular or point-to-point tours

74% point-to-point tours with changing accommodation (70%)

Point-to-point tours

- Younger cycle tourists travelled Ø 2 nights longer



Circular tours*

- Older cycle tourists used hire bikes/pedelecs more often



Was your longest cycling trip in 2016 a point-to-point tour or a circular tour? (n = 3,145)

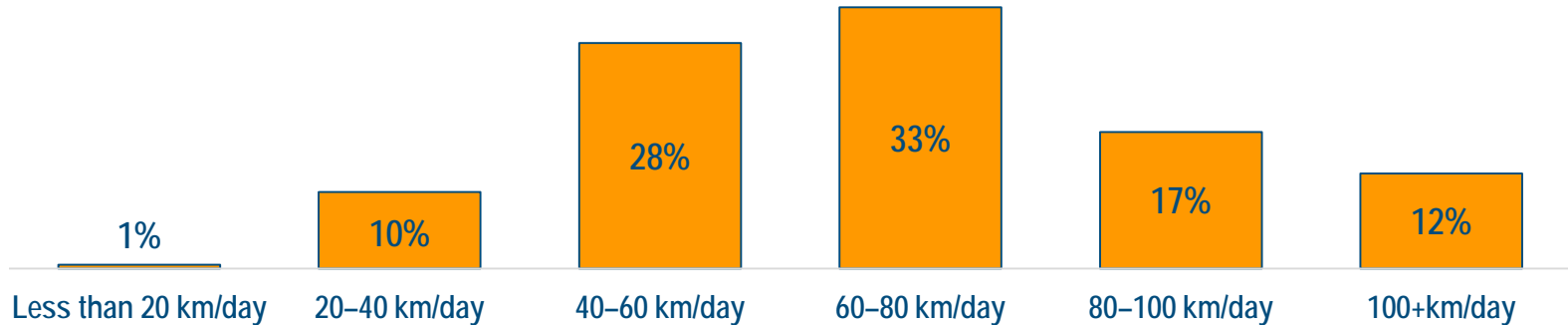
* Tours from fixed accommodation

(%) comparison to 2015

Distance covered by cycle tourists

Ø 65 km per day

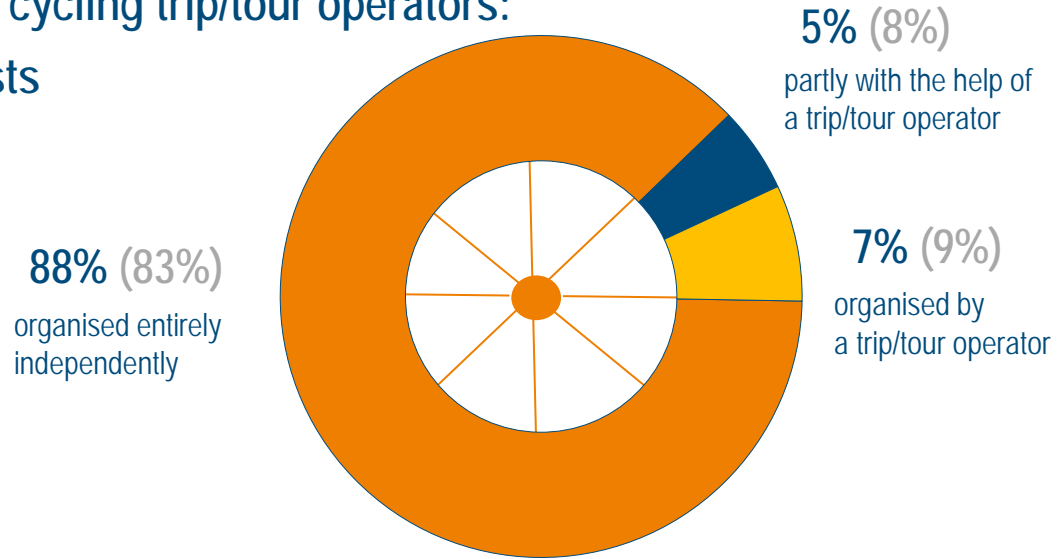
- Majority of point-to-point tours comprised 4 to 6 stages
- Point-to-point tours: Ø 9 holiday days of which 7 cycling days with a total of 544 km covered



How many kilometres did you cycle on average per day? (n = 3,090)

Bicycle travel = individual travel

- 88% of cycling trips organised entirely independently
- Target groups relevant to cycling trip/tour operators:
 - older cycle tourists
 - pedelec users

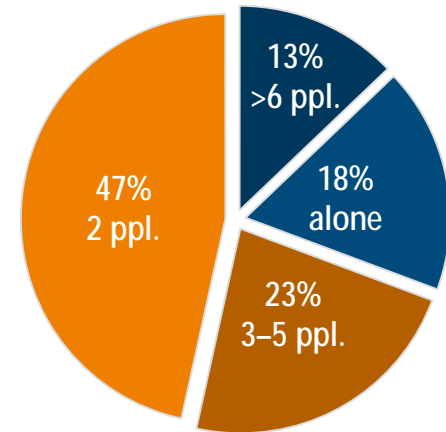
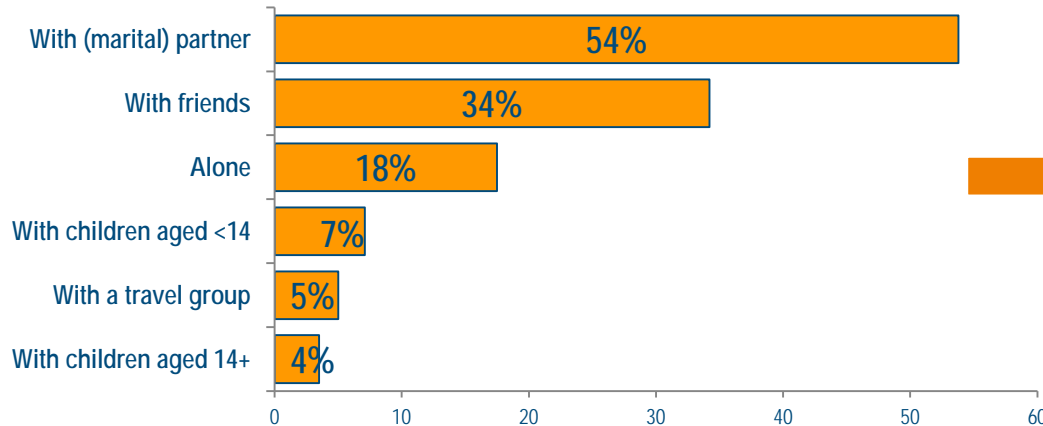


How did you organise your longest cycling trip in 2016? (n = 3,150)

(%) comparison to 2015

Travel companions

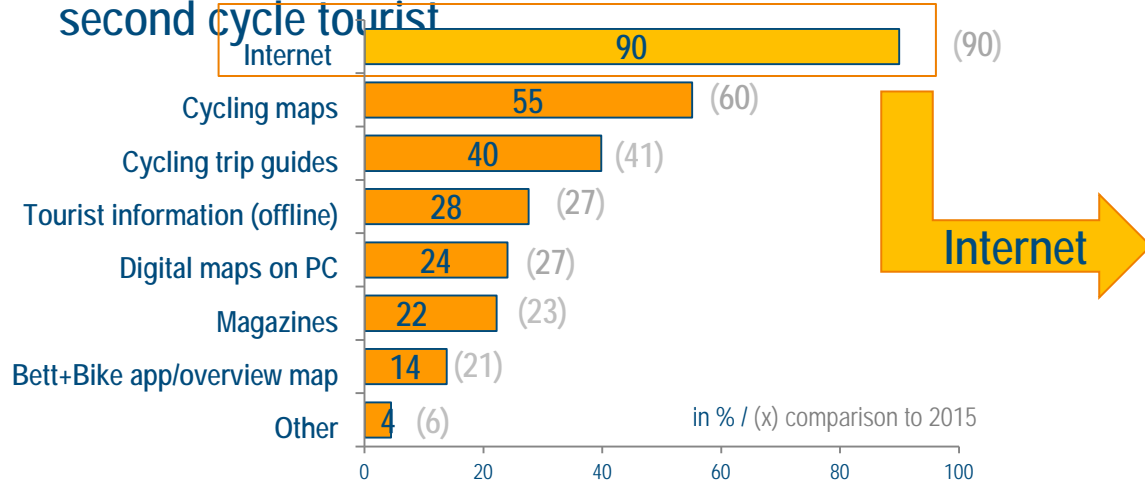
- Partner the most popular travel companion
- Cycling trips with friends second most popular
- Cycling trips with children rare



Who did you complete your cycling trip with? (n = 3,136)

Information sources before the cycling trip

- Internet as the #1 source of information
- “Classic” cycling maps important for every second cycle tourist

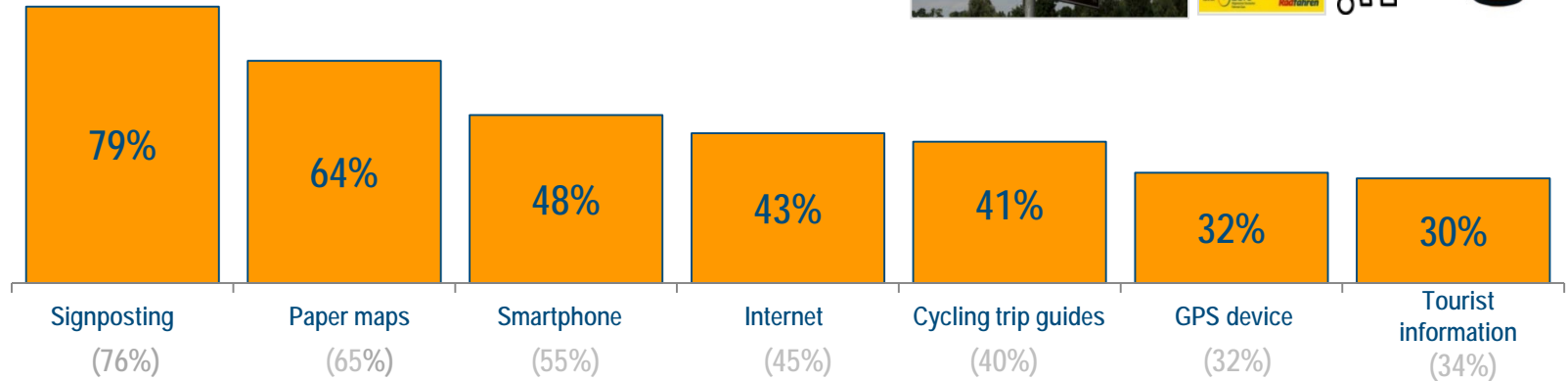


- 72% free digital maps (e.g. Google Maps)
- 61% tourist information online
- 30% travel blogs
- 28% ADFC Tour Portal
- 16% other sources

Which information sources did you mainly use to plan your trip? (n = 3,575) / Which information sources did you use? (n = 3,151)

Orientation during cycling trips

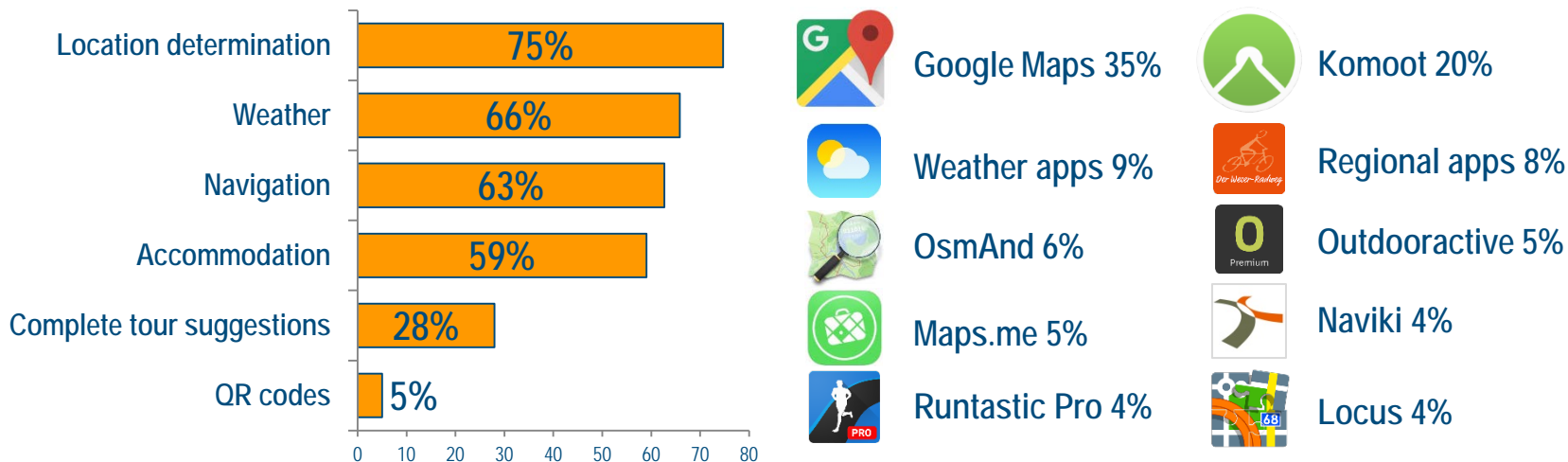
- Signposting most important
- Paper maps preferred over smartphones
- Every second cycle tourist used a smartphone



Which information sources and media do you use for orientation during cycling trips? (n = 3,554) (%) = comparison to 2015

Internet usage on the go and apps

- Top online topics: location, weather, navigation and overnight stays
- Google Maps and Komoot the leaders among the navigation apps
- Significance of QR codes decreased further (9%)



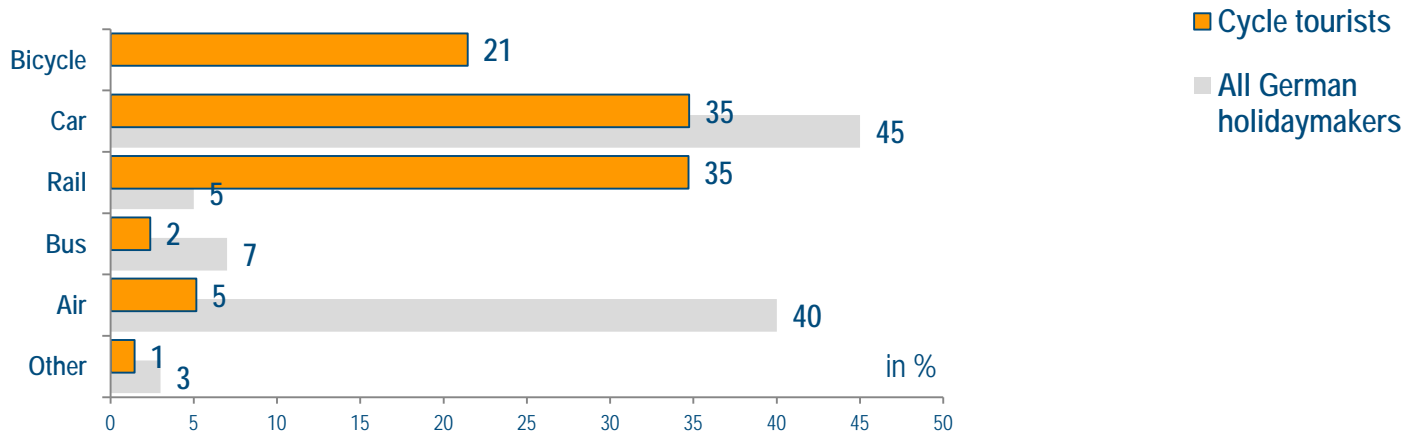
Which information do you access when on the go? (n = 1,805) / Do you also use one or more apps on mobile devices to obtain information when on the go? (n = 1,538)

Which apps do you regularly use during cycling trips? (n = 985)

Modes of transport

Cycle tourism one of the most sustainable forms of travel!

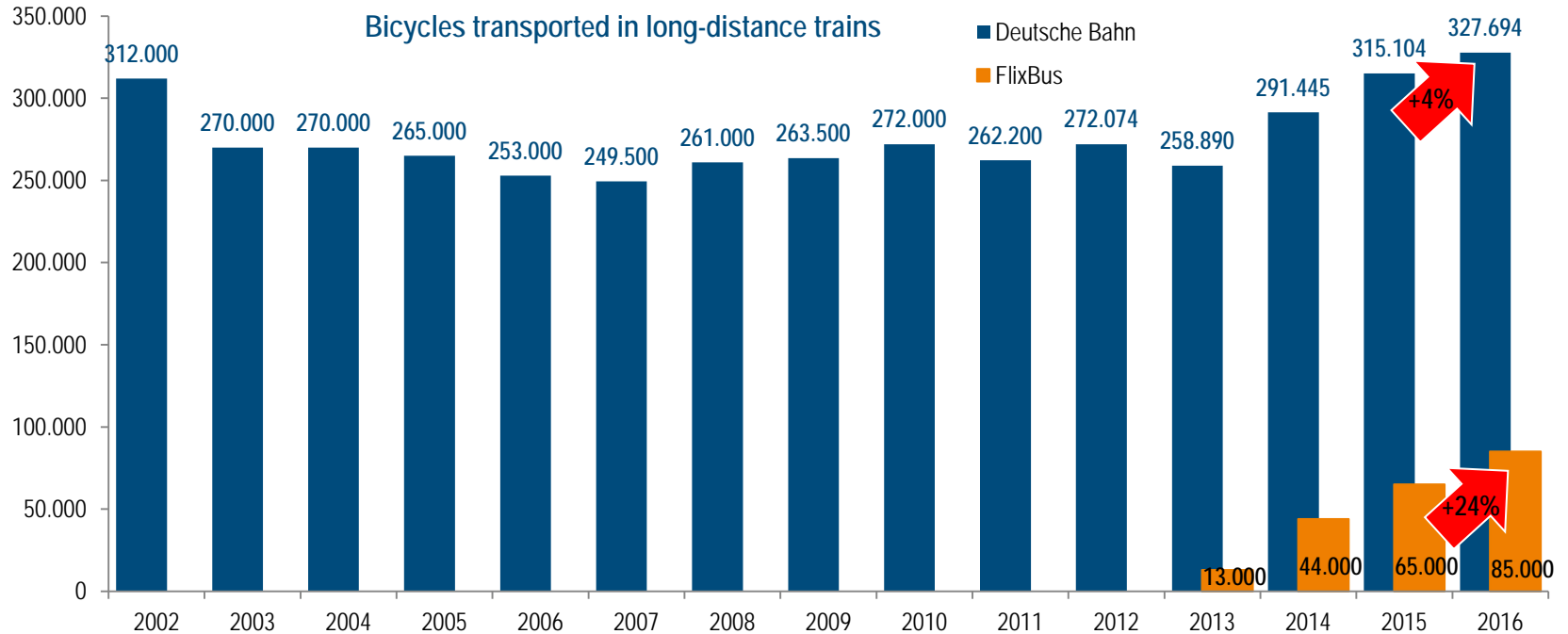
- Significant increase in rail travel
- Air travel is rare



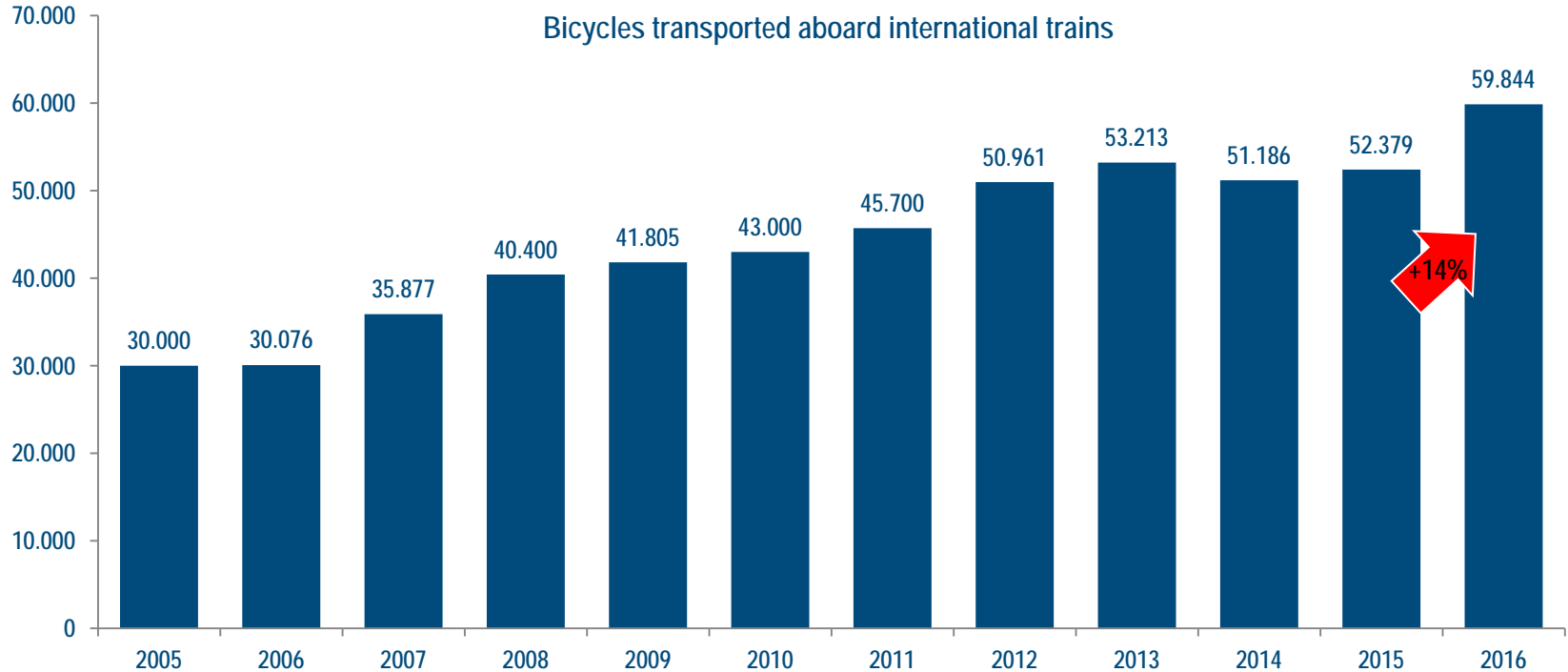
How did you reach the starting point for your longest cycling trip in 2016? (n = 3,057) / How did you travel home again? (n = 3,047)
Data average for travel to/from the chosen destination

Comparative data: 2016 FUR Travel Analysis, "Other" = bicycle

Bicycle carriage in long-distance trains

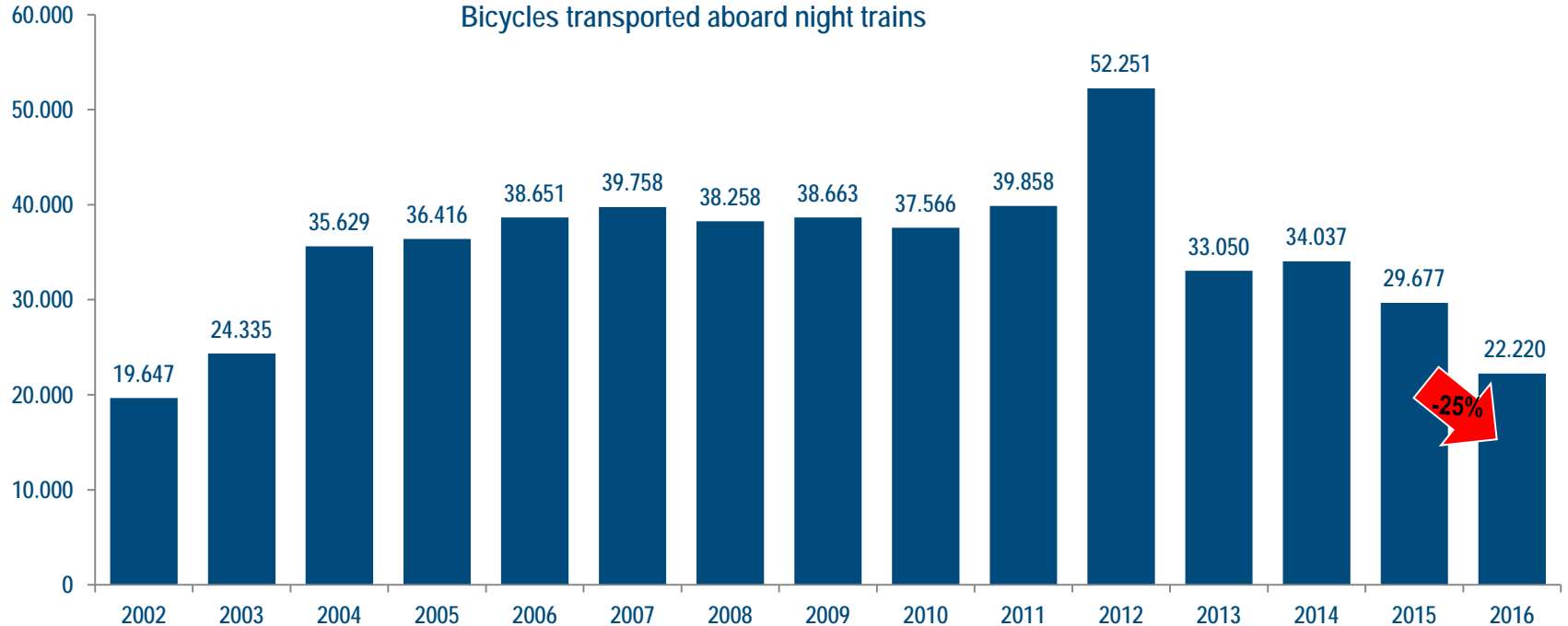


Bicycle carriage via DB International



Sources: DB Fernverkehr AG

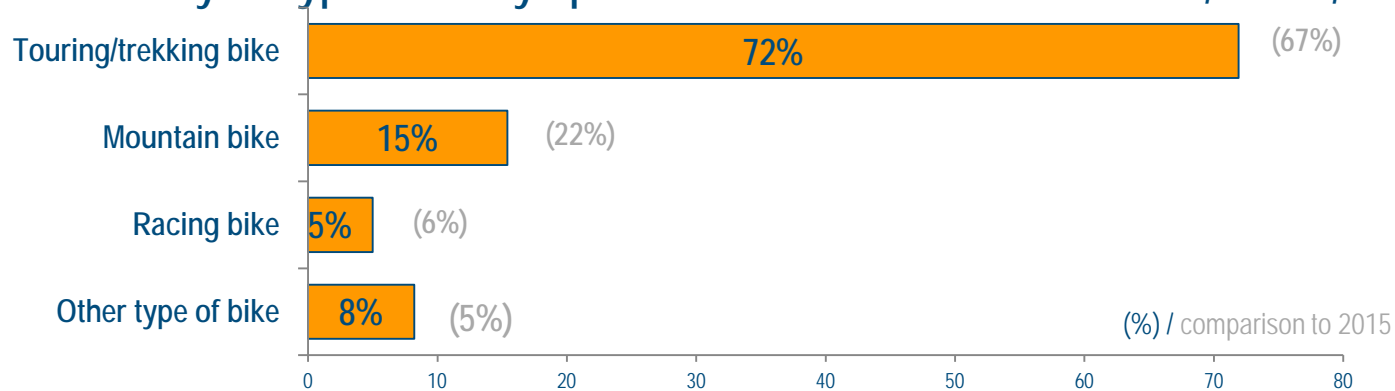
Bike carriage via CityNightLine



Source: DB Fernverkehr AG

Bicycle used for travel

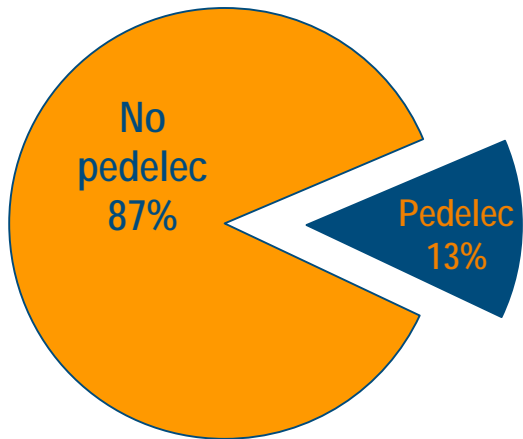
- Almost three quarters of all cycle tourists used a trekking or touring bike (e-bike or conventional bike)
- Proportion of mountain bikes has decreased
- Other bicycle types: mainly specialised bikes such as tandems, trikes, etc.



Which type of bike did you use during your longest cycling trip in 2016? (n = 3,127)

Pedelec users

- Approx. 13% of cycle tourists use a pedelec or e-bike (2015: 11%)
- Target group with highest demand for pedelecs: older, female cycle tourists (Ø 57 years)
- 20% find pedelec offers at the holiday destination important



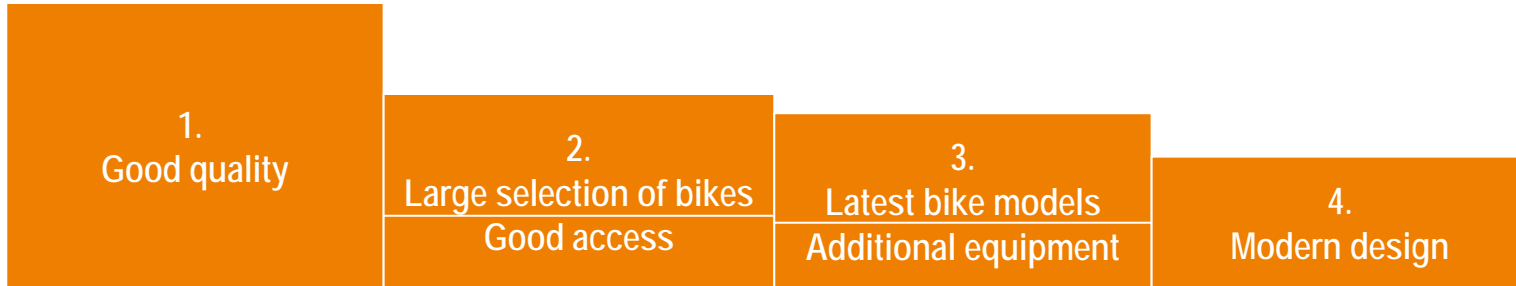
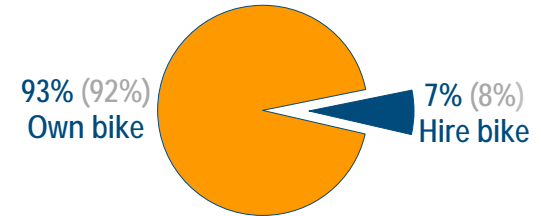
Did you use an electric bike for this trip (regardless of whether a hire bike or your own bike)? (n = 3,117)

Hire bike or own bike?

- Majority of cycle tourists feel most at ease using their own bike
- 7% used hire bikes. Main reason: no need to transport bicycle

Expectations when hiring a bike

- #1 decision criterion: good quality
- Further relevant criteria: choice of bikes and access at destination

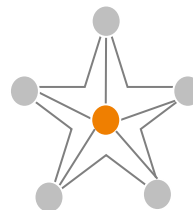
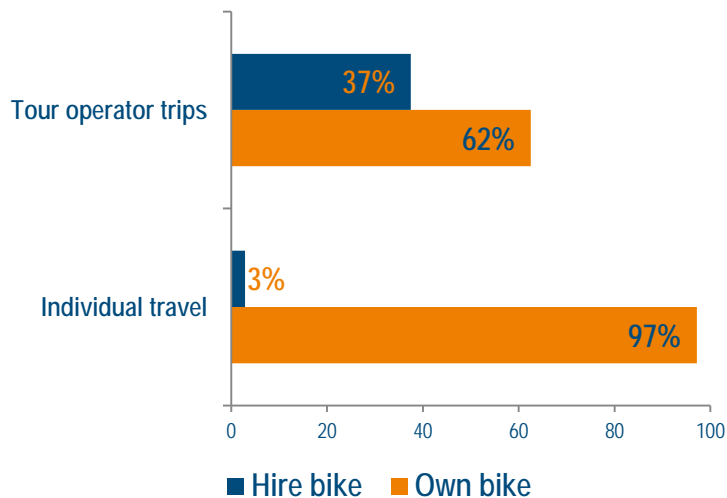


Did you use your own bike or a hire bike for your cycling trip? (n = 3,122) / Why did you use your own bike? (n = 2,936) / Why did you hire a bike? (n = 198)
What expectations do you have of a hire bike? Please weight the points. (n = 3,171)

(%) comparison to 2015

More hire bikes for organised trips

- Hire bikes preferred for trips organised by tour operators as well as circular tours
- Own bikes preferred for individual travel



11% hire bikes for circular tours



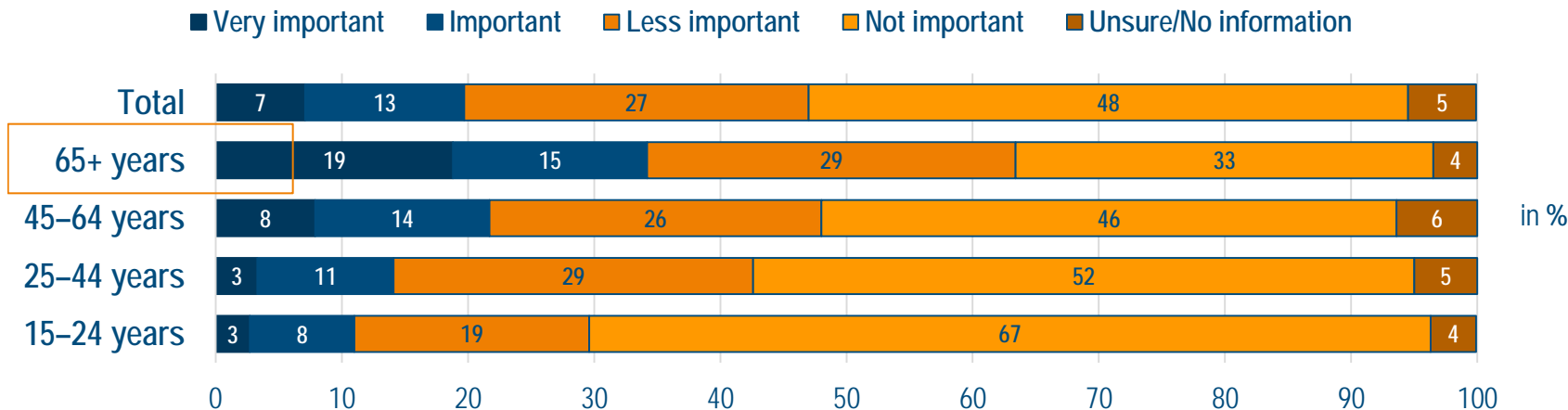
5% hire bikes for point-to-point tours

Did you use your own bike or a hire bike for your cycling trip? (n = 3,122)

Circular tours = tours from fixed accommodation

E-bikes at the holiday destination

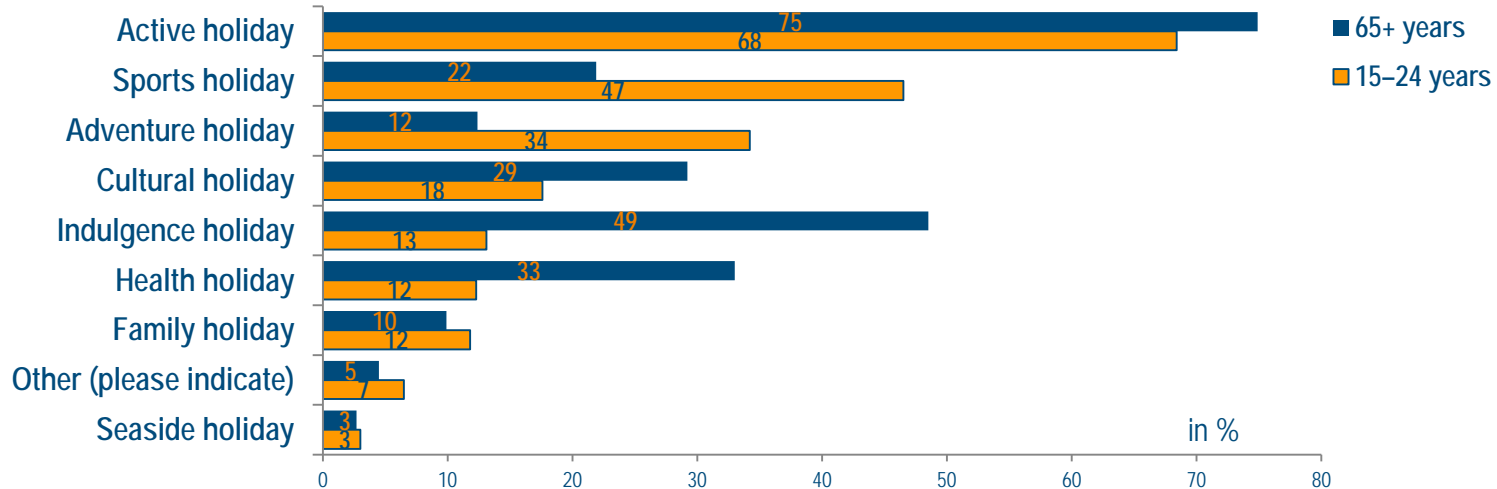
- E-bike offers important for 20% of cycle tourists
- Importance increases with cycle tourist's age:
deemed at least "important" by one third of cycle tourists aged 65+



How important is it to you to be offered modern electric bikes at your holiday destination? (n = 3,157)

Activity+sport / activity+indulgence

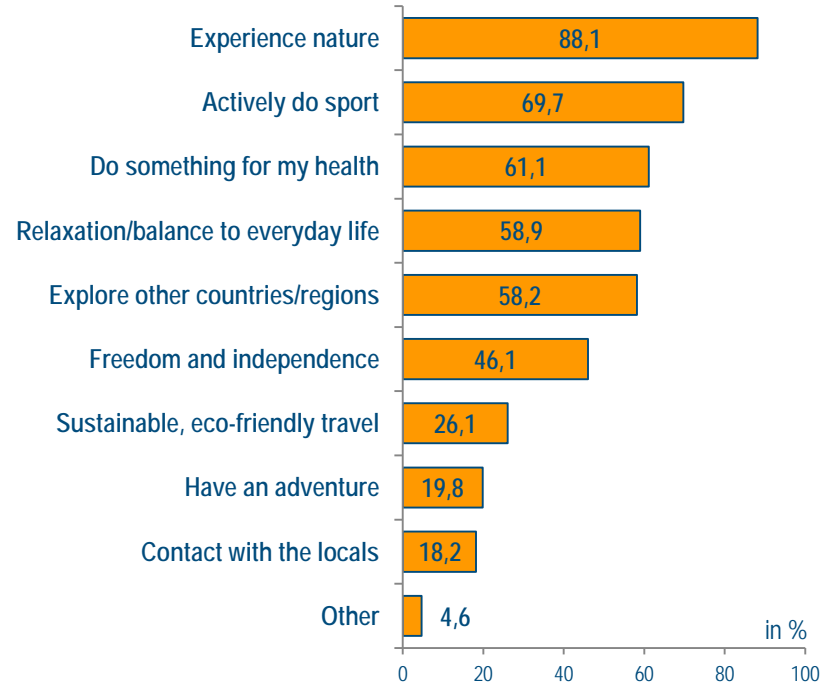
- Cycle tourism synonymous with active tourism
- Combination for older cycle tourists: cycling with indulgence and culture
- Combination for younger cycle tourists: cycling with sport and adventure



How would you describe your longest cycling trip in 2016? (n = 626; valid answers only)

Cycle tourists' motives

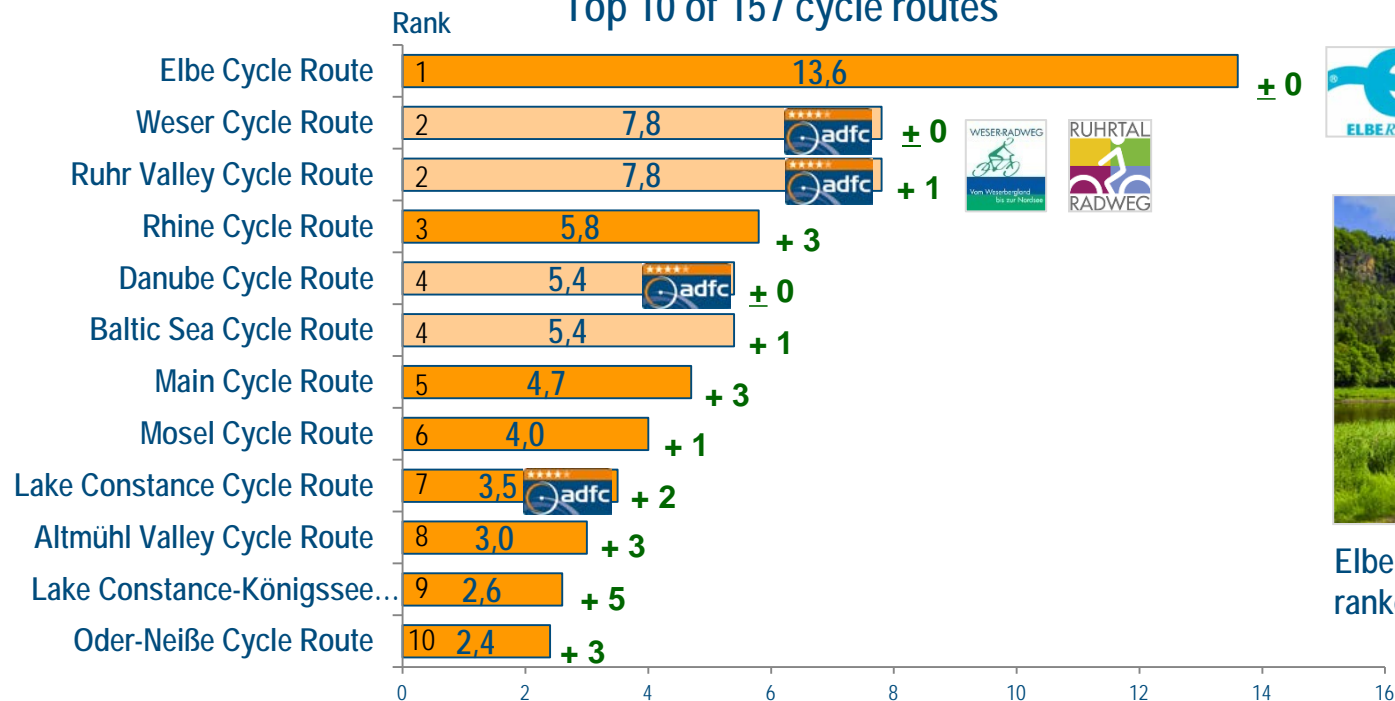
- Main motives:
 - “experience nature” and “actively do sport”
- Other important motives:
 - health
 - relaxation
 - explore countries/regions
- Less important:
 - adventure/contact with the locals
- Environmental aspect relevant for one in four cycle tourists
 - Sustainability as a positive side effect



Which of the following motives were decisive for your cycling trip? (n = 3,555)

Most popular long-distance cycle routes in Germany

Top 10 of 157 cycle routes

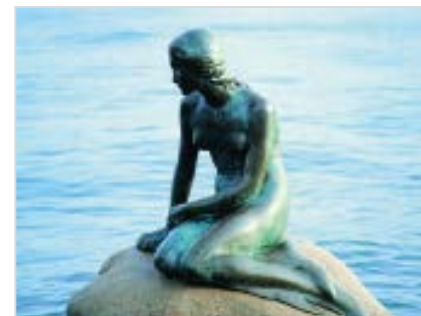
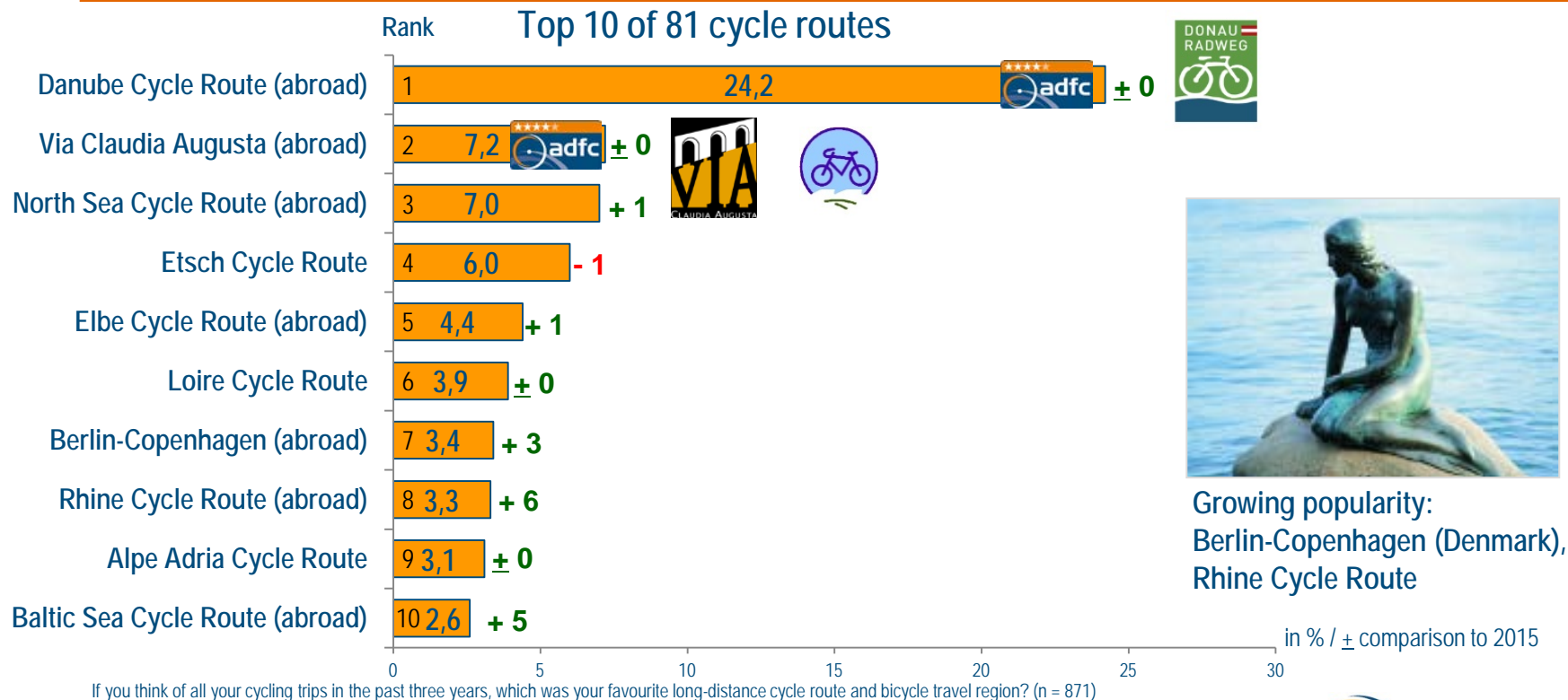


Elbe Cycle Route:
ranked #1 for the thirteenth time!
in % / ± comparison to 2015

Multiple routes available

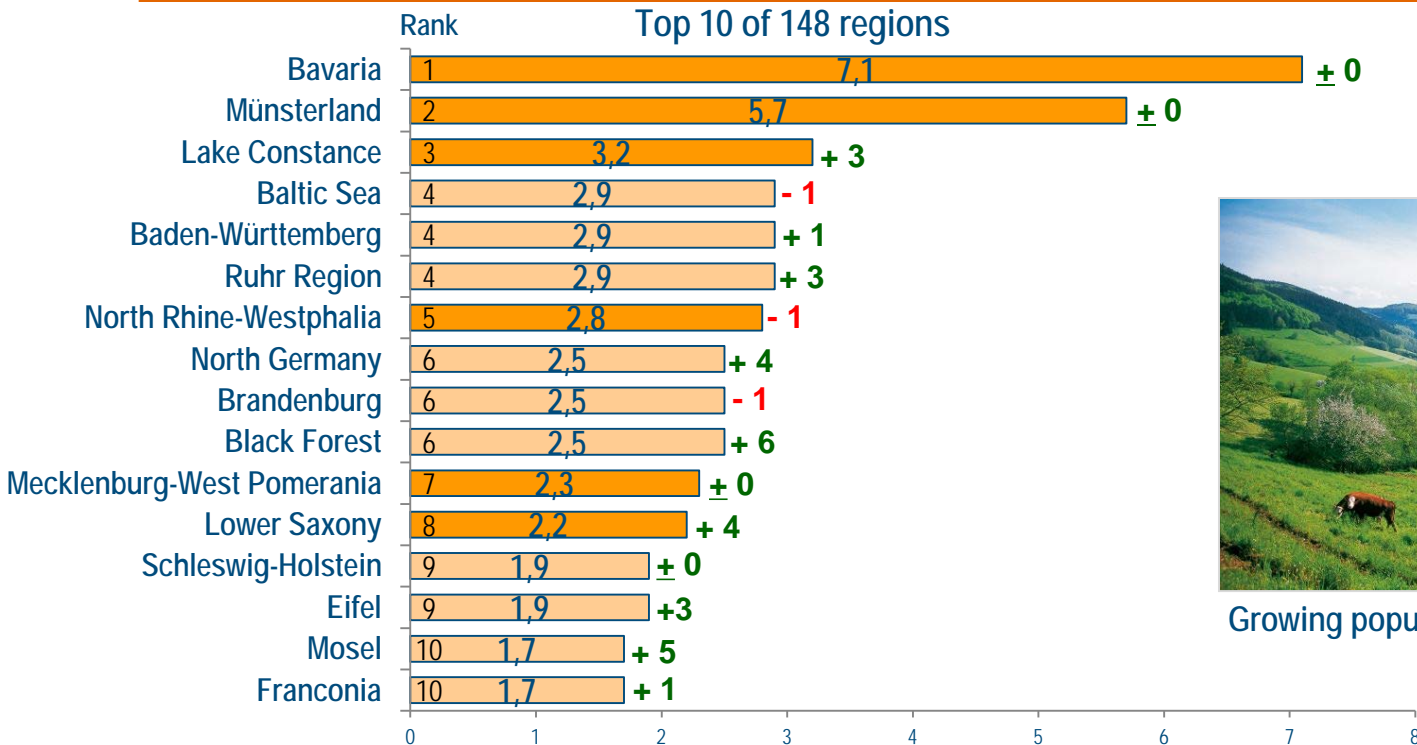
If you think of all your cycling trips in the past three years, which was your favourite long-distance cycle route and bicycle travel region? (n = 2,347)

Most popular long-distance cycle routes abroad



Growing popularity:
Berlin-Copenhagen (Denmark),
Rhine Cycle Route

Most popular bicycle travel regions in Germany



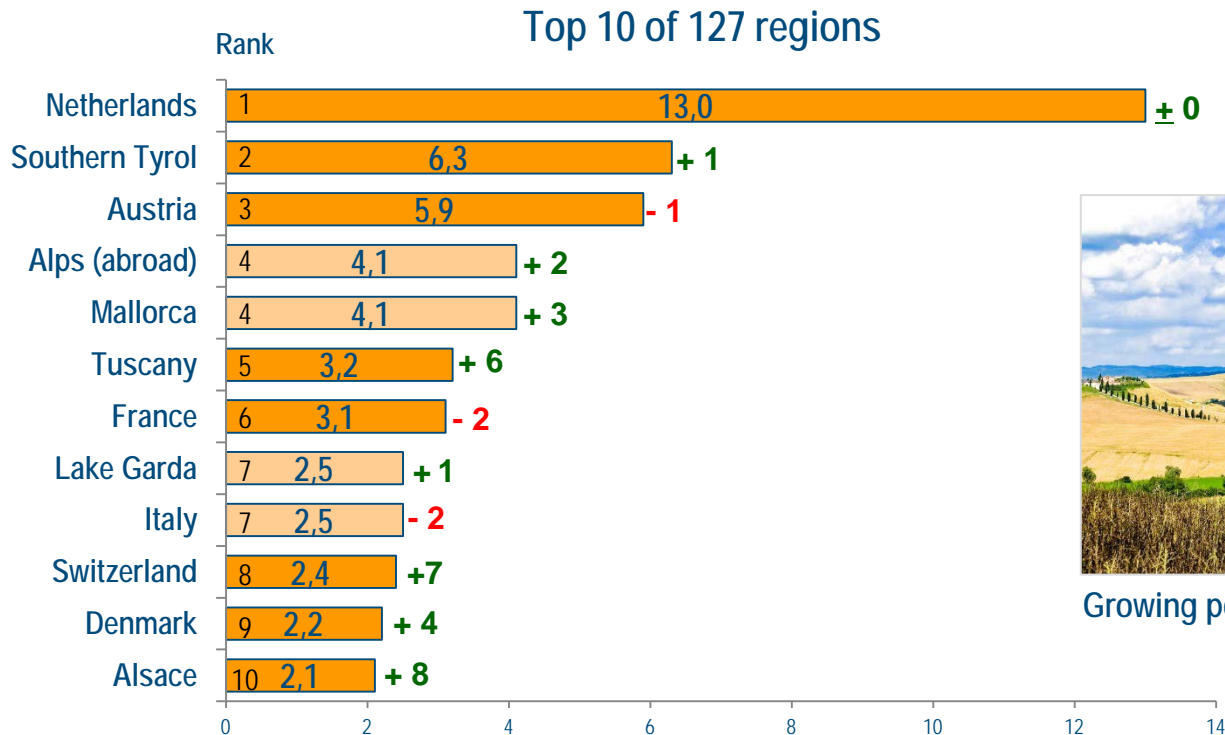
Growing popularity: the Black Forest

in % / ± comparison to 2015

Multiple routes available

If you think of all your cycling trips in the past three years, which was your favourite long-distance cycle route and bicycle travel region? (n = 2,795)

Most popular bicycle travel regions abroad



Growing popularity: Tuscany

in % / ± comparison to 2015

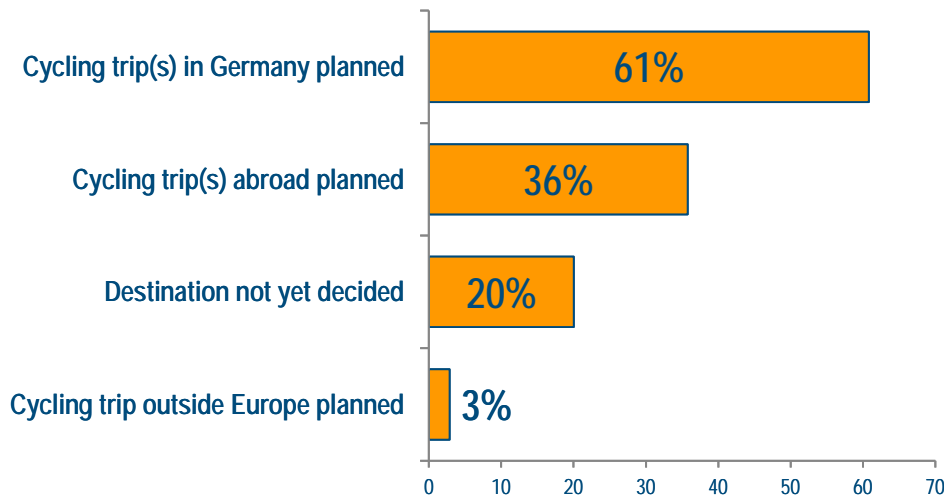
Multiple routes
available

If you think of all your cycling trips in the past three years, which was your favourite long-distance cycle route and bicycle travel region? (n = 1,689)

Cycling trip destinations in 2017

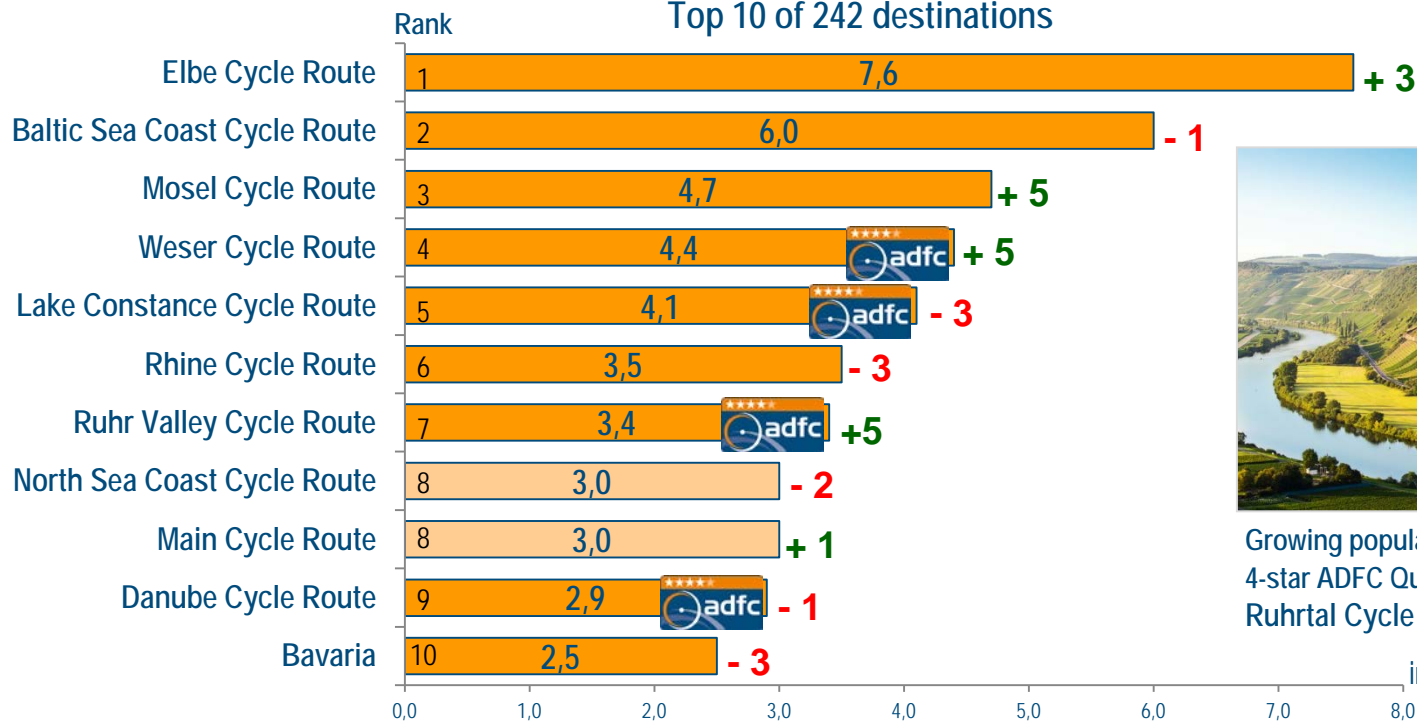
84% plan to also complete at least one cycling trip in 2017

- 61% are planning a cycling trip within Germany
- 20% have not yet decided the destination of their cycling trip



Cycling trip destinations in Germany in 2017

Top 10 of 242 destinations

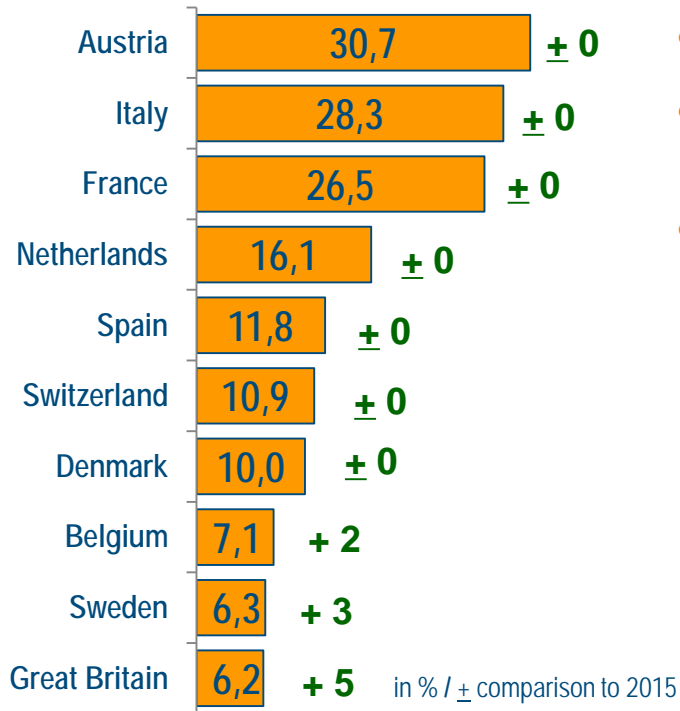


Growing popularity: Mosel Cycle Route,
4-star ADFC Quality Routes: Weser Cycle Route,
Ruhr Valley Cycle Route

in % / ± comparison to 2015

Multiple routes
available

Cycling trip destinations abroad in 2017



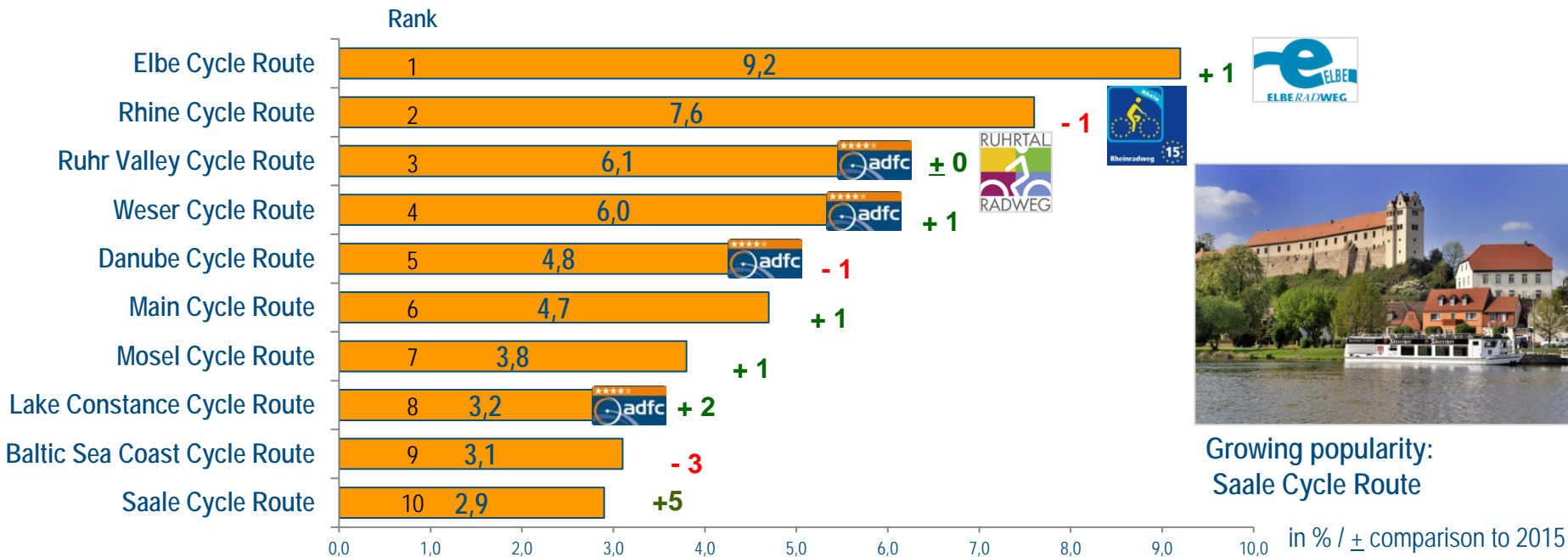
- Top 3: Austria, Italy and France
 - Considerable increase in popularity of France (2015: 20.2%)
 - Belgium, Sweden, Great Britain also more popular
- Further destinations: Baltic region, Poland, Czech Republic



Which European destinations are you planning for your cycling trip(s) in 2017? (n = 1,051)

Long-distance cycle routes cycled in Germany in 2016

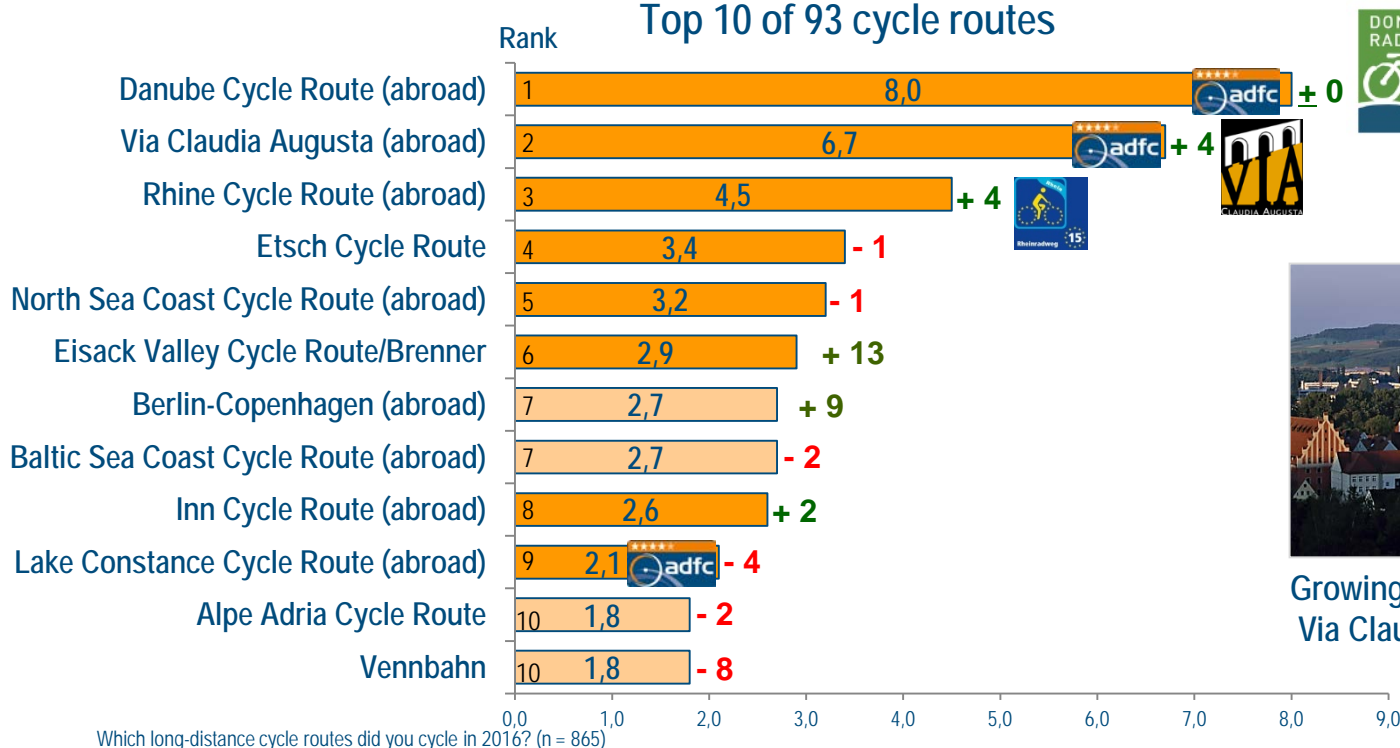
Top 10 of 257 cycle routes



Which long-distance cycle routes did you cycle in 2016? (n = 2,689)

Long-distance cycle route cycled abroad in 2016

Top 10 of 93 cycle routes

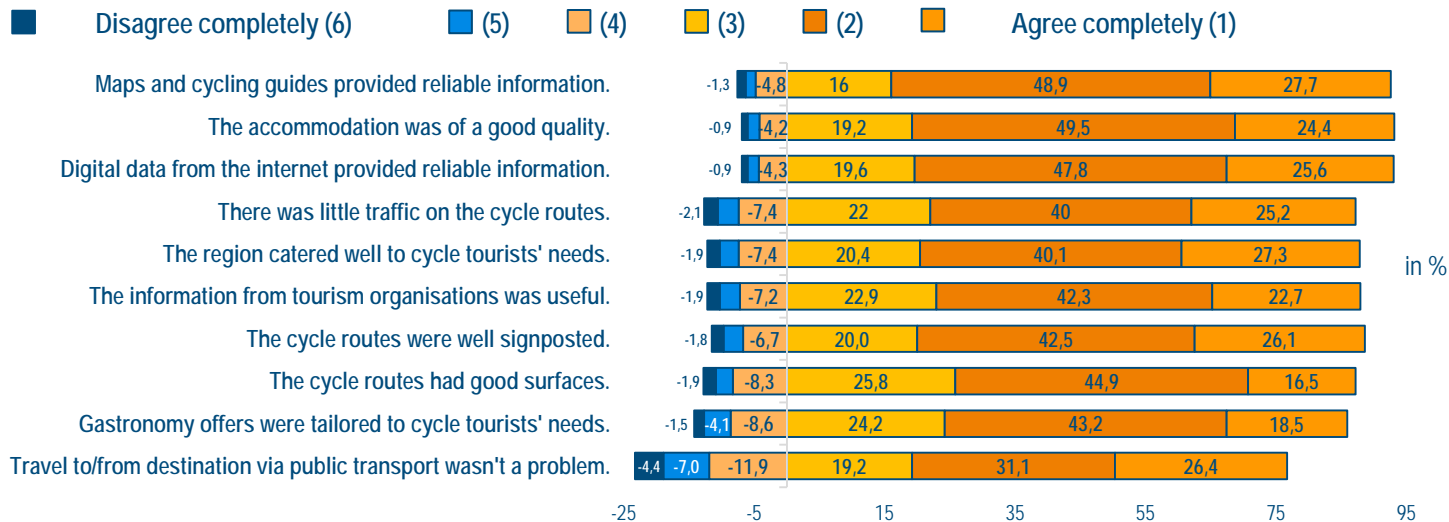


Growing popularity:
Via Claudia Augusta
in % / ± comparison to

Multiple routes
available

Quality of offers

- Further scope to improve bicycle carriage in public transport
- Scope to improve signposting



How would you rate the quality of the route/region of your longest cycling trip? (n = 2,989; valid answers only)

Unusual ideas along cycling routes

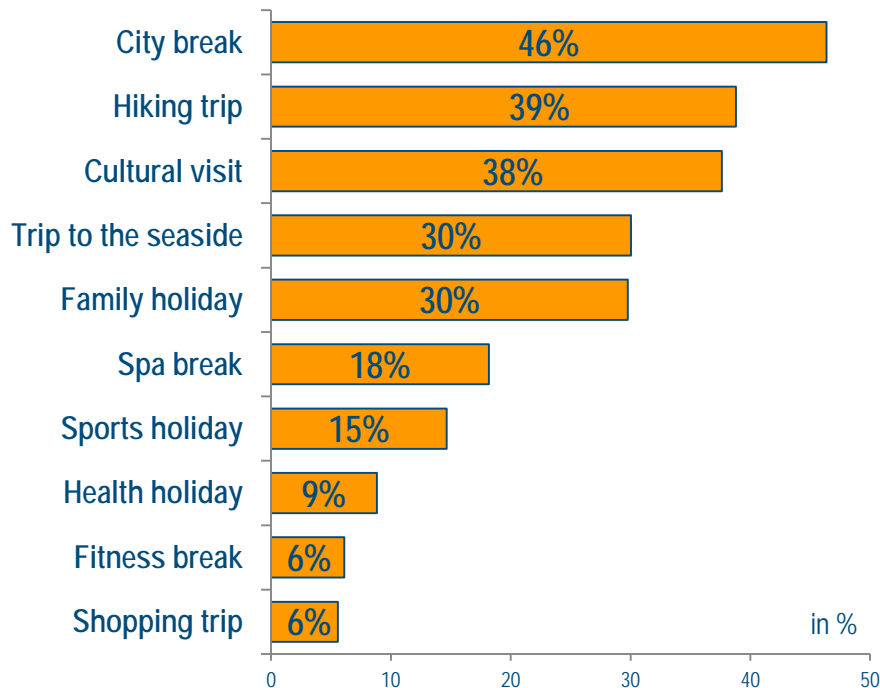
- Cycle tourists appreciate Germany as a cycling destination
- However, just 15% of cycle tourists found features/ideas specifically for the target group along the route
- E.g. specific information, dining options, shops, storage facilities for cyclists

Opportunity for destinations:
use the development potential of cycle tourism as a USP



Did you notice any particularly good or unusual ideas along your chosen route that surprised you as a cycle tourist? (n = 2,979)

Combinations of holiday/travel types



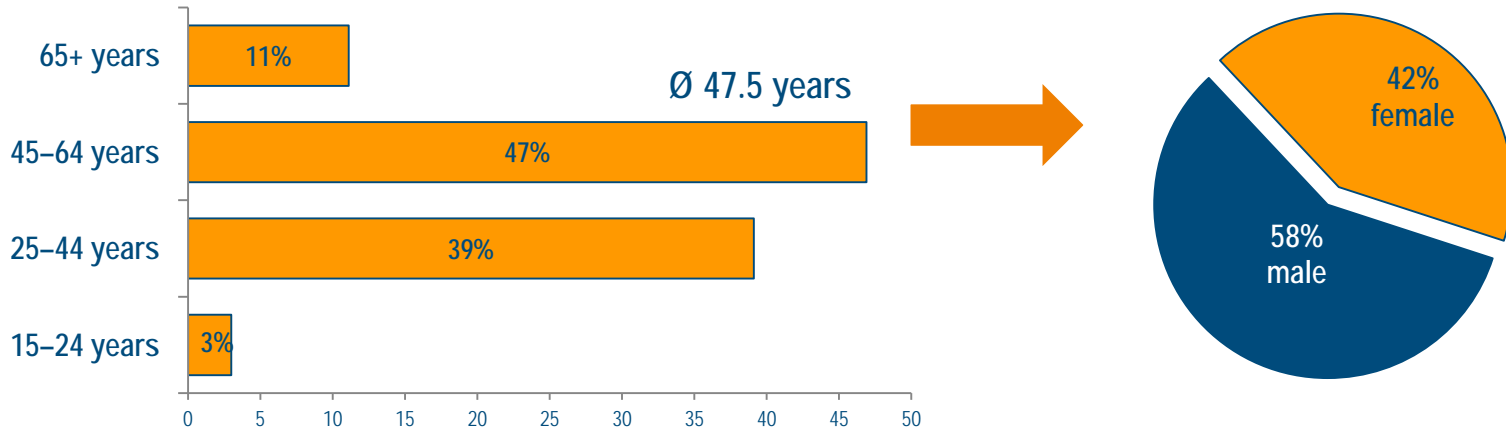
Top 3: city breaks, cultural visits, hiking trips



What type(s) of holidays did you go on in addition to your cycling trip in the past year? (n = 3,127)

Sociodemographics: age and gender

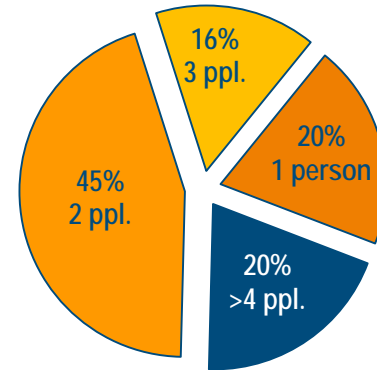
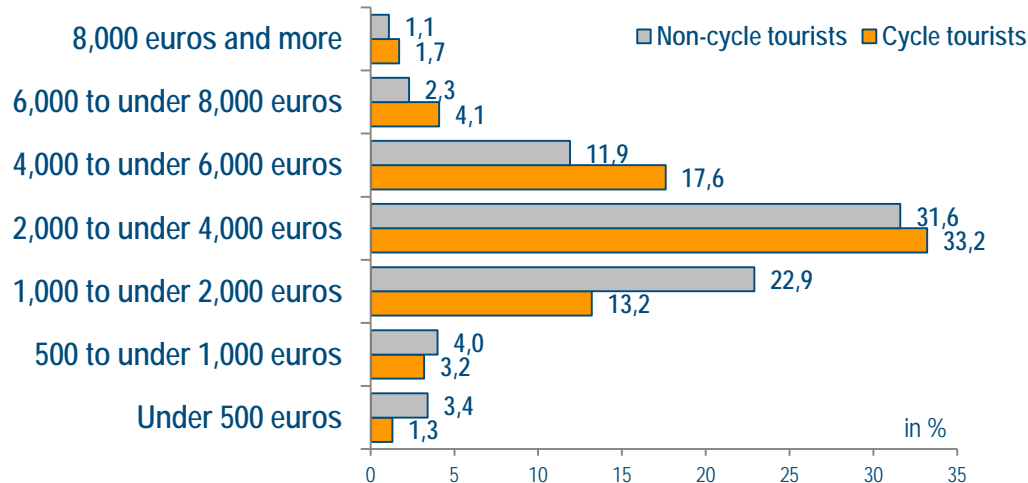
- Slightly more male cycle tourists
- Women catching up as cycle tourists
- Possible reason: increased demand for pedelecs among women



Age and gender (n = 3,692)

Sociodemographics: income and household size

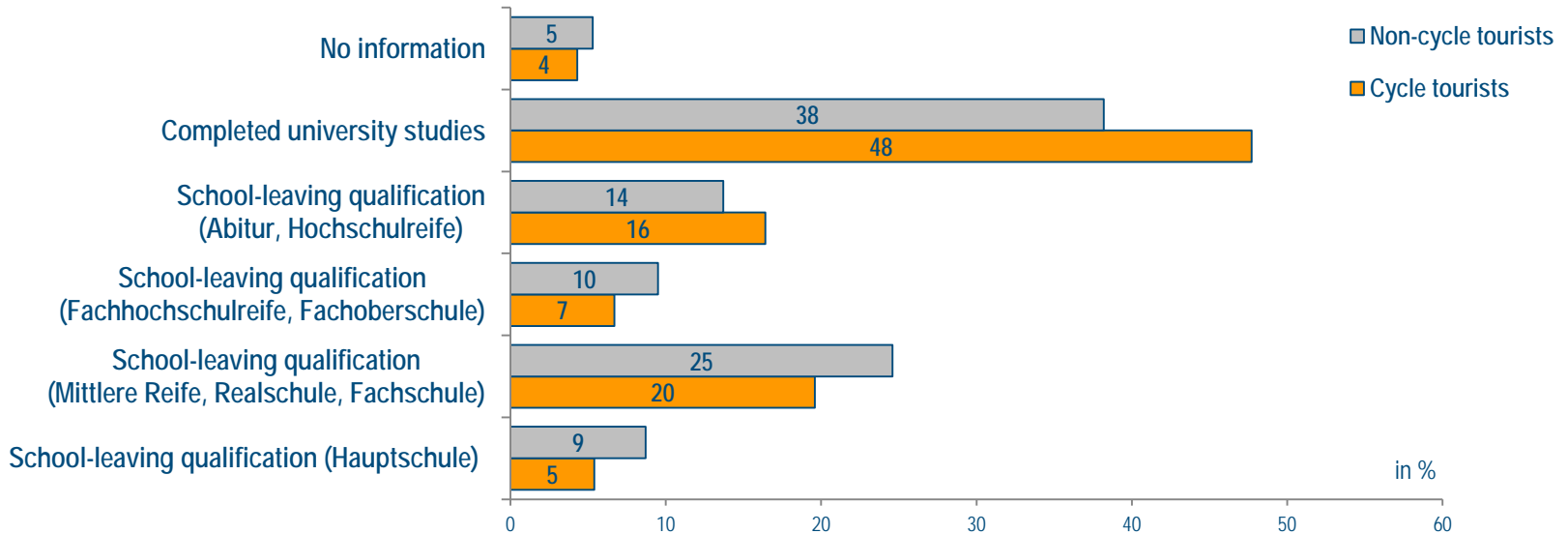
- Cycle tourists earn more than the average holidaymaker
- Ø household size: 2.4 people
- 78% of households with no children



What is your monthly net household income? (n = 3,046 more, no information: n = 2,852) / How many people live in your household? How many of these are children under the age of 15? (n = 3,829)

Sociodemographics: formal education (all respondents)

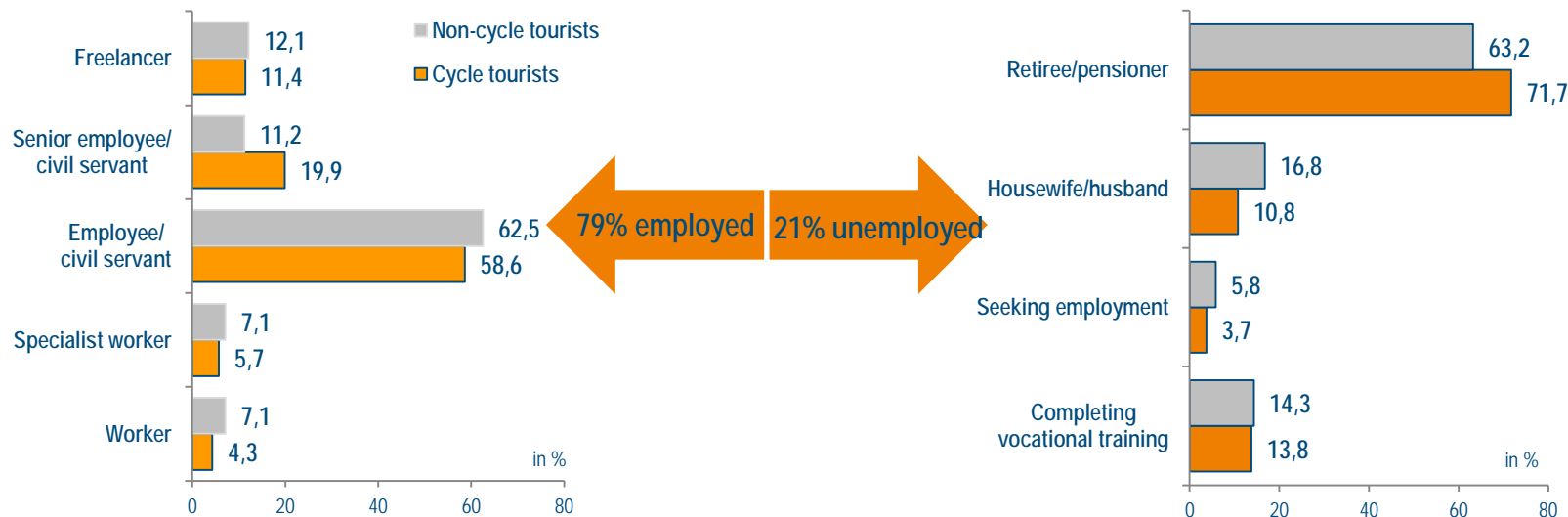
- Cycle tourists mainly academics
- Slightly higher level of formal education compared to non-cycle tourists



What is the highest academic qualification you hold? (n = 3,837)

Sociodemographics: employment (all respondents)

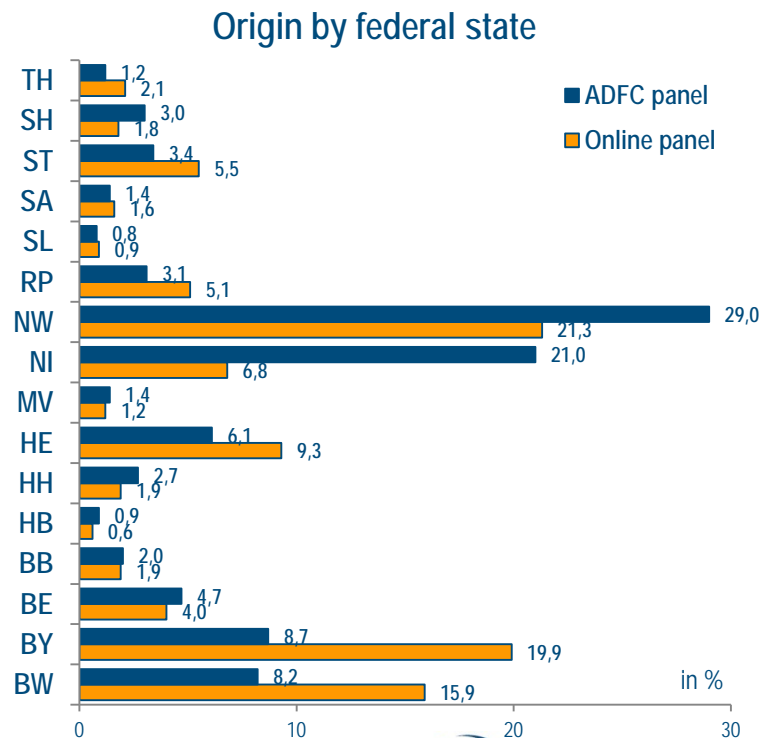
- 79% in gainful employment
- Mainly senior employees/civil servants – incl. the retirees



Are you in gainful employment? If employed: What are you employed as? If unemployed: What is your current status? (n = 3,832 / n = 2,765 / n = 1,067)

Origin of respondents (all respondents)

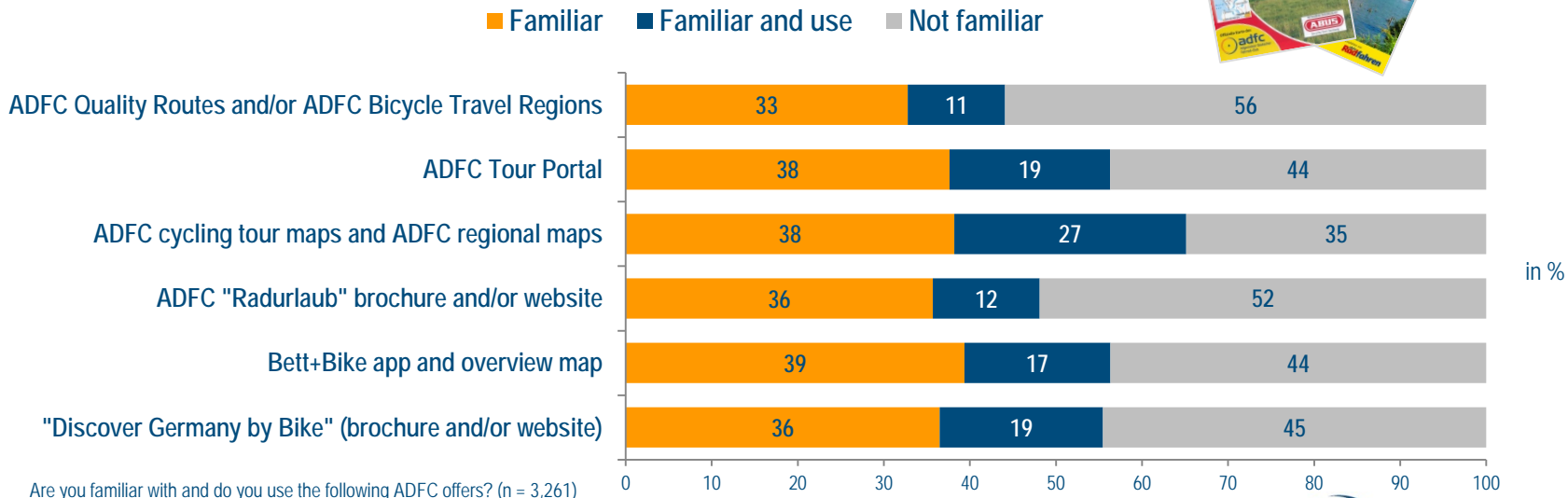
- Online panel:
 - cross section of the German population
 - Suitable benchmark for weighting
- Freely recruited ADFC panel:
 - Majority from NRW, Lower Saxony
 - Bavaria, Baden-Württemberg under-represented



Federal state where respondent resides (n = 6,993)

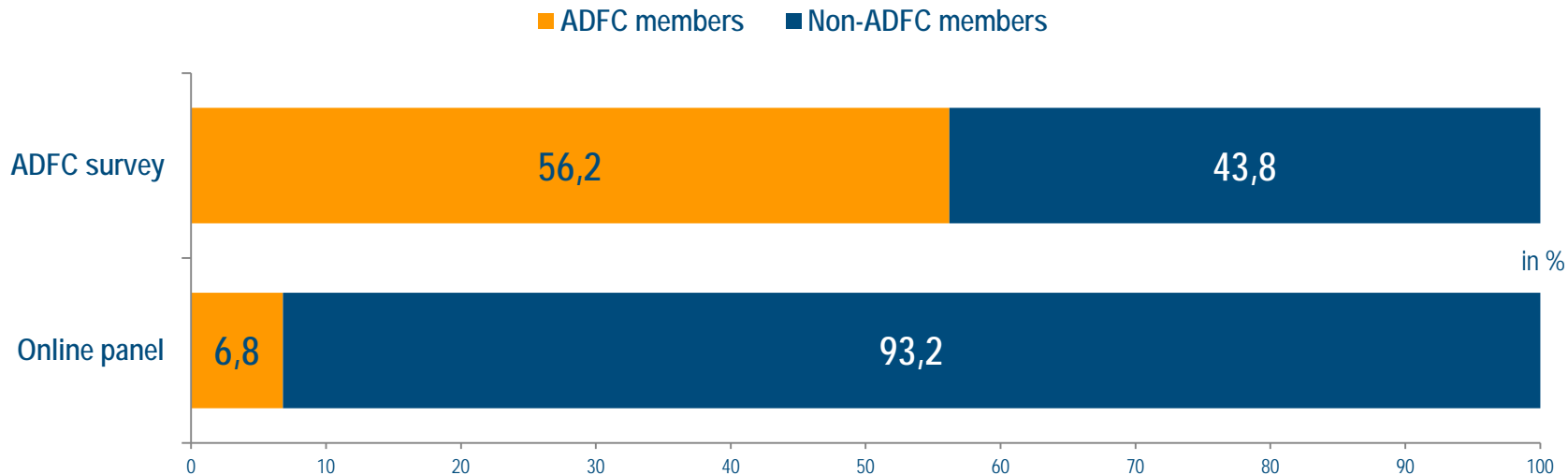
Familiarity with ADFC products

- ADFC maps used most frequently
- ADFC Tour Portal also important for orientation



ADFC membership (all respondents)

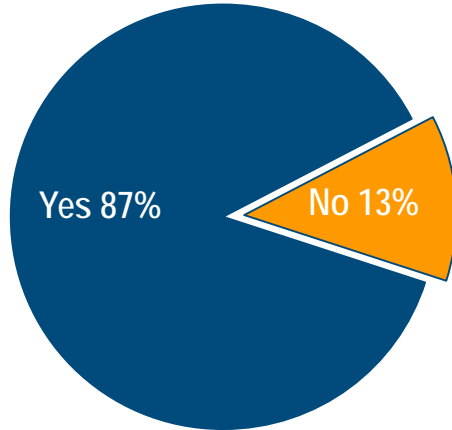
- Proportion of ADFC members in the open survey (ADFC sources) greater than the panel
- Membership criterion weighted to the online panel value (6.8%)



Are you a member of the ADFC? (n = 7,009)

Everyday cycling

- 87% of cycle tourists also cycle in their everyday lives (86%)
- 30% cycle more in their everyday lives after their cycling trip! (28%)



Do you use your bike as an everyday mode of transport? Has cycling on holiday led you to also cycle more in your everyday life? (n = 3,252) (%) = comparison to 2015

Honouring of ADFC Quality Routes at the ITB 2017



The ADFC Quality Routes in figures

ADFC has been awarding “Quality Route” status since **2006**

Run time of **3** years

Around **12,000** kilometres have been checked by ADFC experts, kilometre by kilometre

Routes in Germany as well as in **7** other European countries

Total of **37** ADFC Quality Routes and **5** ADFC Bicycle Travel Regions

Of these, **4** long-distance cycle route are among the **Top 10** most popular cycle routes

Routes in the north-west



Legende

- Auszeichnungen ITB 2017
- laufende ADFC-Qualitätsradrouten
- ADFC-RadReiseRegionen

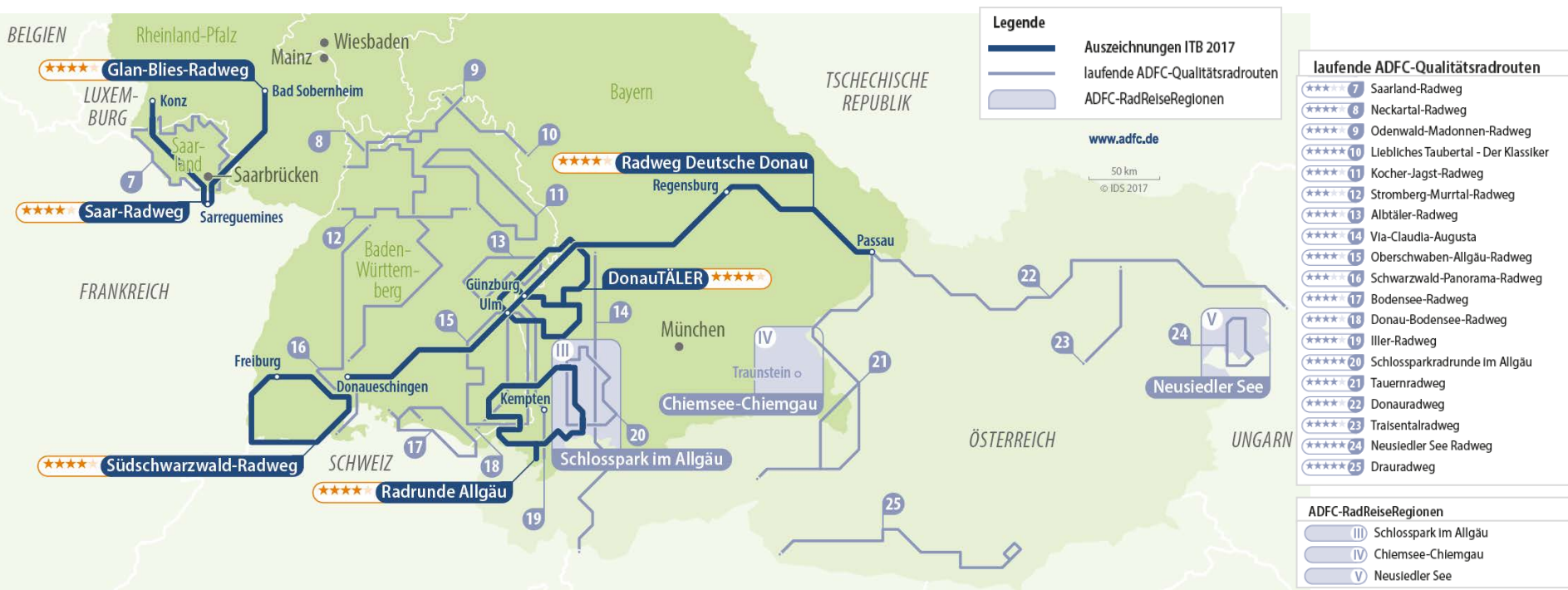
laufende ADFC-Qualitätsradrouten

- 1 Vechtelroute
- 2 Grenzgängerroute Teuto-Ems
- 3 Flusslandschaft Achterhoek - Westmünsterland
- 4 RuhrtalRadweg
- 5 Ilmtal-Radweg
- 6 Vennbahn

ADFC-RadReiseRegionen

- I Heideregion Uelzen
- II Seenland Oder-Spree

Routes in the south



FAHRRADLAND DEUTSCHLAND. JETZT!



The ADFC campaign in the *Bundestag* election year!

2017 ADFC-Travelbike Bicycle Travel Analysis

A huge thanks to our supporters:

- The cycle tourists surveyed
- T.I.P. BIEHL & PARTNER – market and tourism research
- German National Tourist Board (DZT)
- Deutsche Bahn AG
- FlixBus

Full 2017 ADFC-Travelbike Bicycle Travel Analysis available for download online:

www.adfc.de/radreiseanalyse