



ADFC-Radreiseanalyse

for the 2022 cycling year



Report on the survey findings



adfc

Allgemeiner Deutscher
Fahrrad-Club

Publisher

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Images/graphs

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About the ADFC

With more than 220,000 members, the German National Cyclists' Association (ADFC) is the largest interest group for cyclists in Germany and worldwide. The association is organised into 16 state federations with over 500 local groups. Around 11,000 people volunteer with the ADFC. 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 2023

Methodology

A cycle tourist has been defined as follows for the ADFC Bicycle Travel Analysis:

»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.«

The data for the ADFC Bicycle Travel Analysis is collected between November and January during online surveys. Two national representative panels and an open survey published via the ADFC's communication channels are used. Since most of the data obtained via the ADFC's communication channels comes from enthusiastic cyclists, this data is weighted to avoid any skewing of the overall results.

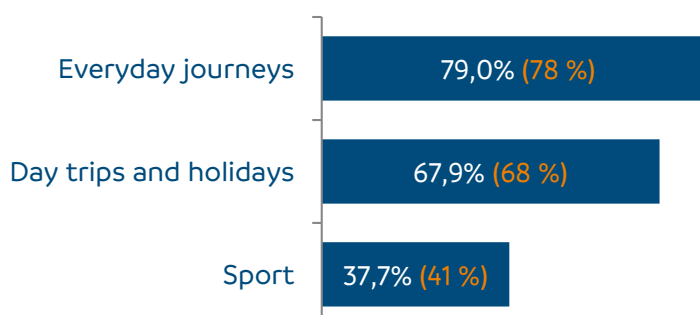
The two closed panels collect nationally representative data on bicycle usage in general and the proportion of day trippers and cycle tourists (n=3,437). The data from the open survey provides a comprehensive basis for analysis of the specific characteristics of cycle tourists (n=9,099). A total of 12,536 evaluable questionnaires were available. If data is available from previous years, it has additionally been provided in brackets.

A crisis-proof habit: cycling in everyday life and while on holiday remains popular after the pandemic.

76% of the population of Germany cycles occasionally to regularly (2021: 82%). So the proportion of cyclists has decreased compared to the previous year, but remains at a similar level to in 2019 (77%).

What do you use your bicycle for?

(Only people who cycle; unweighted n=1,824)



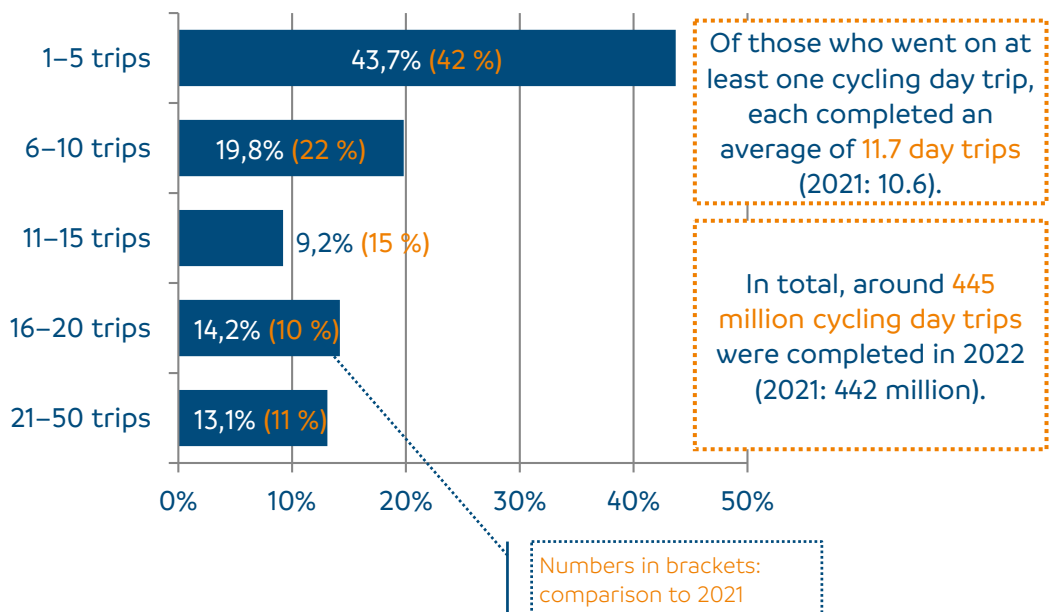
The proportion of people who cycled during day trips and holidays remained constant compared to the previous year, but has increased significantly compared to 2019 (54.9%).

The total number of day trips has increased.

In 2022, around **38 million** people went on at least one cycling day trip. This is about 4 million people less than in the previous year (2021: 41.6 million), but still 4 million people more than in 2019. At the same time, the number of day trips per person increased in 2022, hence the absolute number of day trips has risen to 445 million.

How many cycling day trips did you go on in 2022?

(Only respondents who went on at least one cycling day trip; n=10,153)



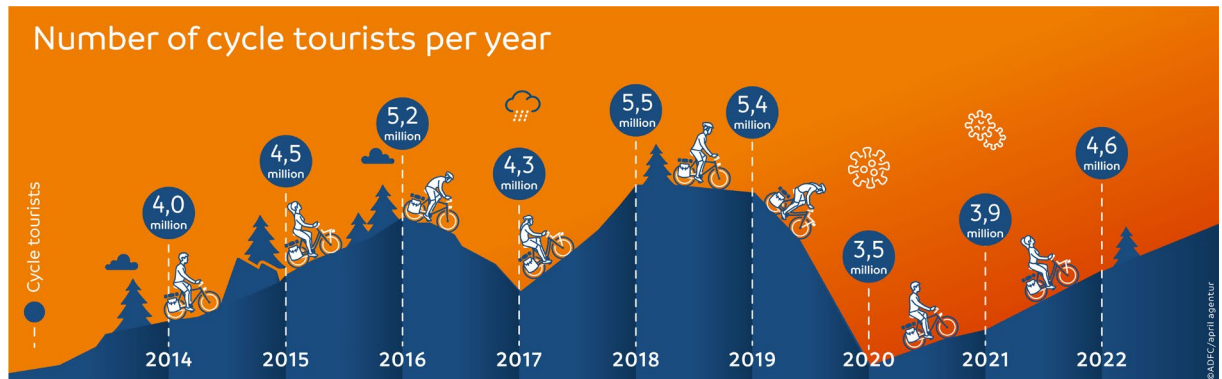
Day trippers are covering greater distances.



60% (59%) of cyclists started their trip from home. If another starting point is chosen, it is an average of 47 km from the cyclist's place of residence (2021: 46 km). The radius grew slightly compared to the previous year, but is not as wide as in 2019.

Day trippers covered an average of 46 km (2021: 43 km). 2% cycled more than 100 km and 9% less than 20 km during their trip.

The number of cyclists continues to grow, but has not yet attained the pre-pandemic level of 2019.



Around 4.6 million people went on a cycling trip in 2022. This corresponds to 6.6% of the total population of Germany. The increase compared to the previous year is 0.7 million, which means that the level of 2019 has not yet been attained (14% fewer cyclists). A similar development can thus be discerned in cycle tourism as it can in tourism as a whole: there has been a clear recovery, but there is still a slight minus compared to 2019.

The proportion of female cycle tourists is increasing. The average age remains constant.



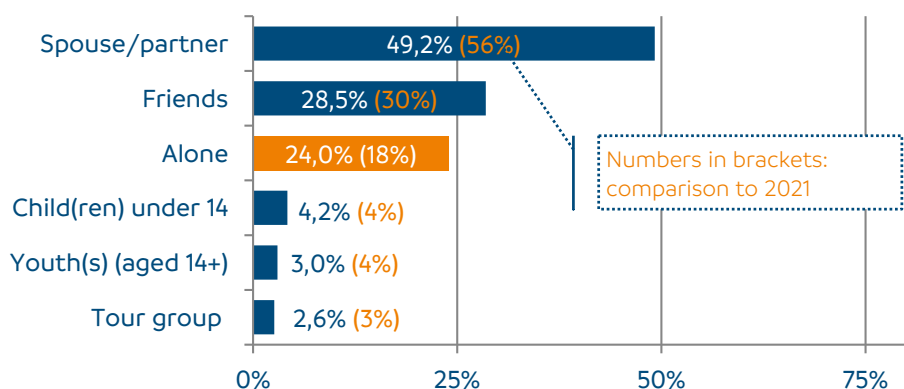
58.6% of cycle tourists are male (2019: 64.7%)
40.9% of cycle tourists are female (2019: 34.9%).
0.6% of cycle tourists are diverse (2019: 0.5%).

On average, cycle tourists are 53.5 years old.

More cyclists are venturing out alone.

Who did you complete your cycling trip with?

(Only cycle tourists; n=1,770)



Cyclists are covering greater distances again.



The proportion of point-to-point cyclists increased compared to the previous year (2021: 67%). This corresponds to the figures from 2019. The average trip length was 7.4 nights. This means that the trend towards shorter trips observed before the pandemic has not been continued.

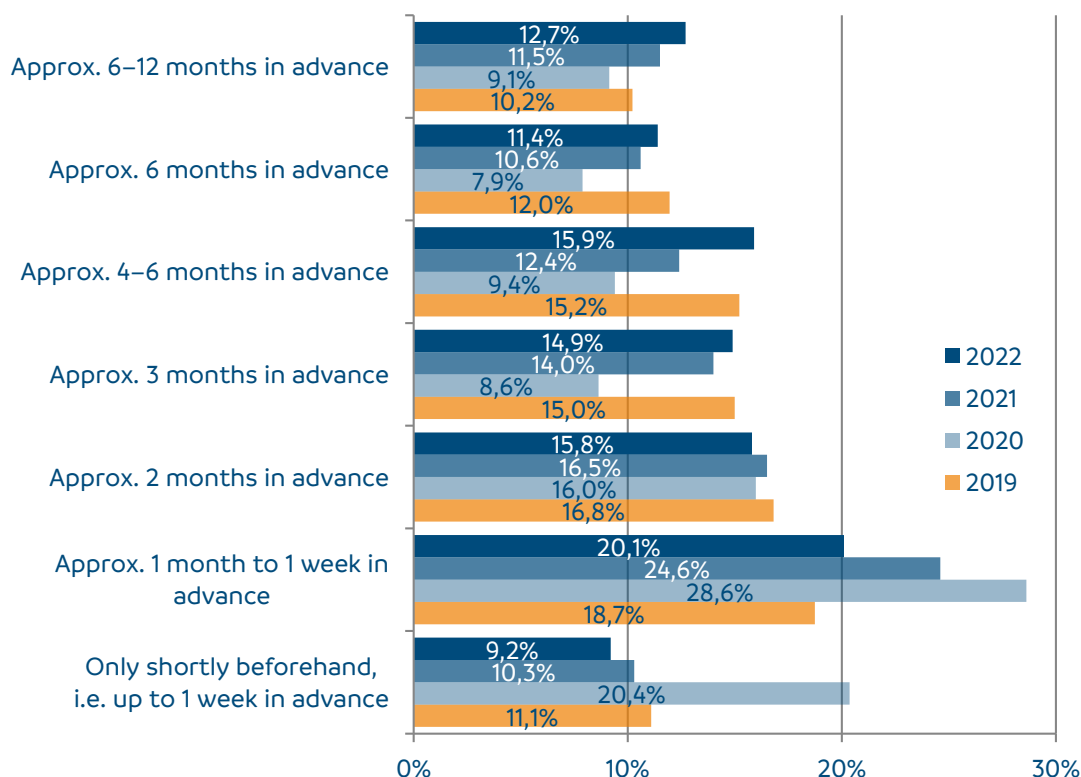


The travel (decision) takes place earlier in the year.

Travel decision

The decision to go on a trip was reached earlier in the year (comparable to 2019).

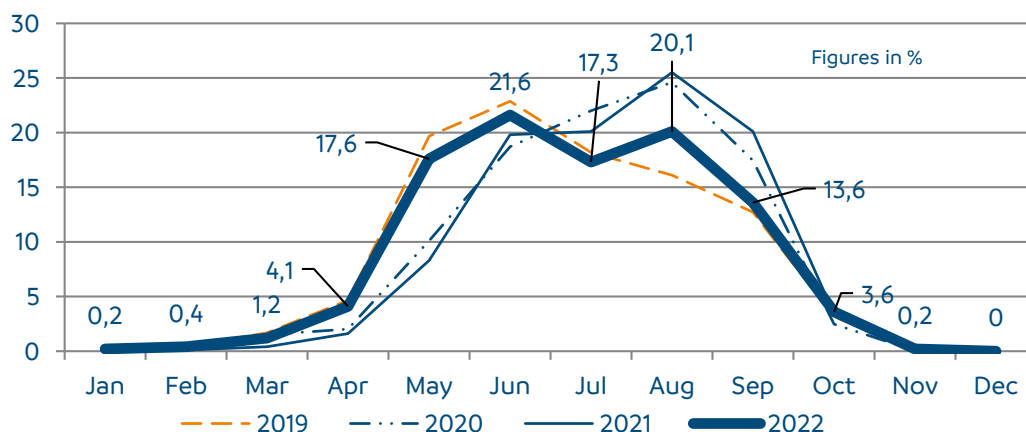
When did you decide on the destination for your main/most important cycling trip?
(only cycle tourists; n=1,770 / compared to 2019/2020/2021)



Travel time

Cycling trips start earlier in the year again (May, June; second peak in August).

In which month did you start your most important cycle tour in 2022?
(only cycle tourists; n=1,770)

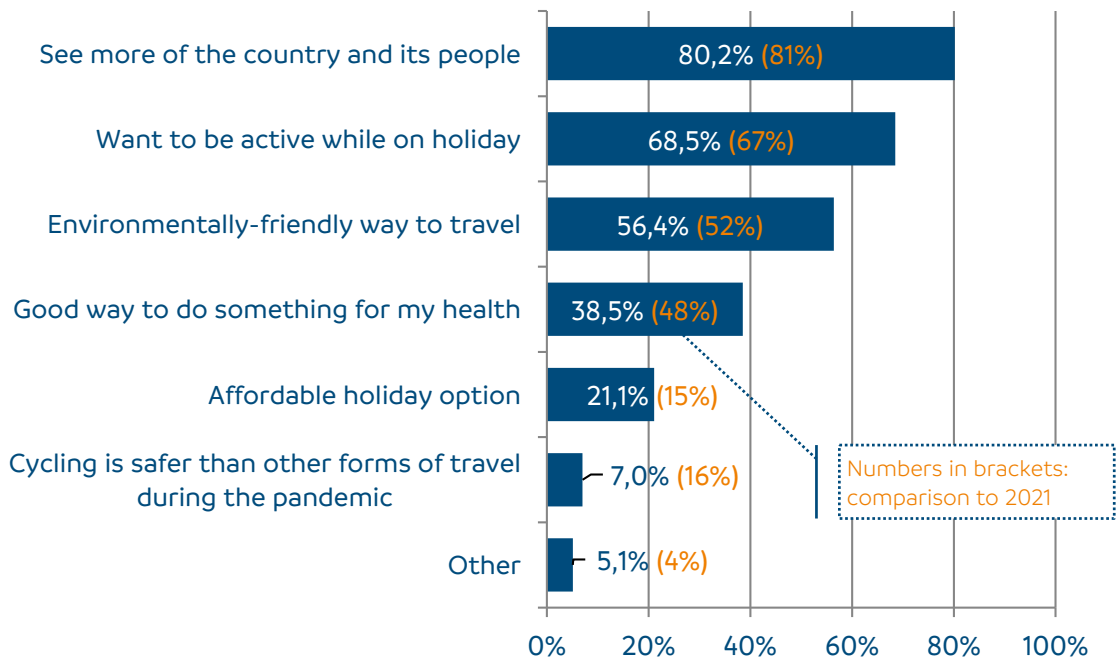


Affordable, environmentally friendly and flexible holidays

More than 80% of respondents opted for a cycling holiday to get to know the country and its people better. More than two thirds want to be active while on holiday. The fact that cycle tourism is also an affordable travel option was important for a growing number of cycle tourists (increased to 21%).

What were the three main reasons for you deciding to go on a cycling trip?

(Only cycle tourists; n=2,483)

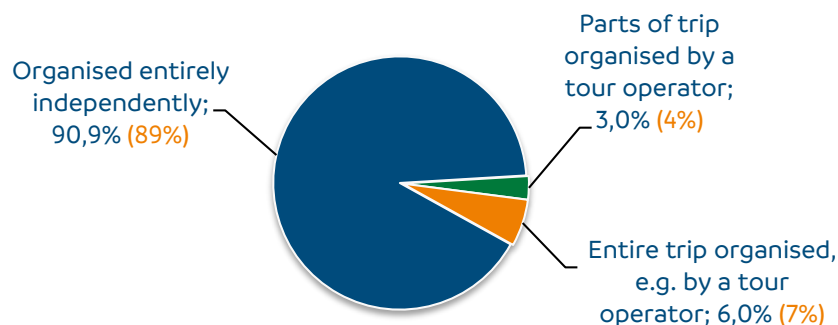


Travel organisation

Cycle tourists mostly organise their trips for themselves. Allowing them to flexibly adapt the route planning and type of accommodation to their needs.

How did you organise your most important cycling trip in 2022?

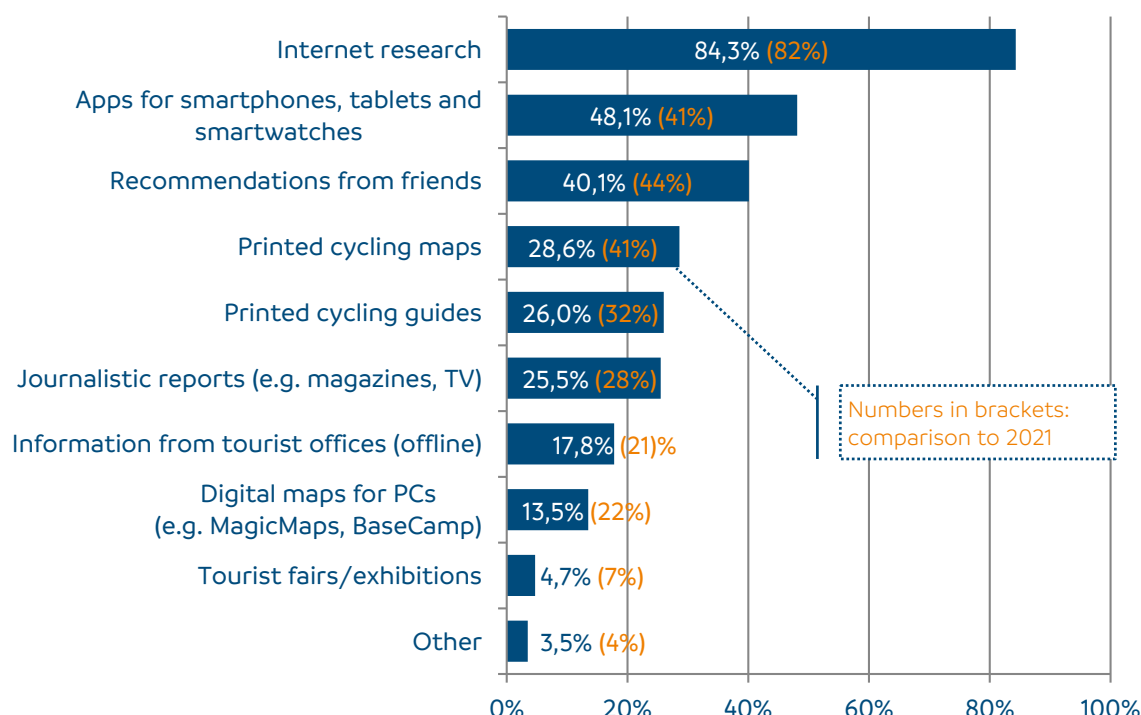
(Only persons who went on a cycling trip; n=1,770)



Information is increasingly obtained via digital channels, both in advance and while on the go.

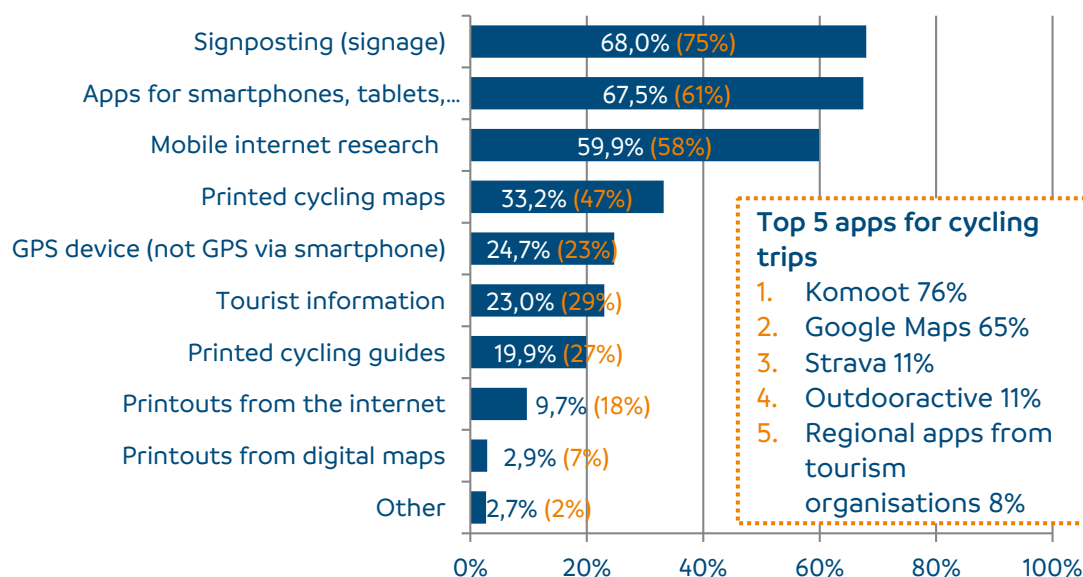
Before cycling trips

Which sources of information did you mainly use to plan your trip?
(Only cycle tourists; n=10,055)



During cycling trips

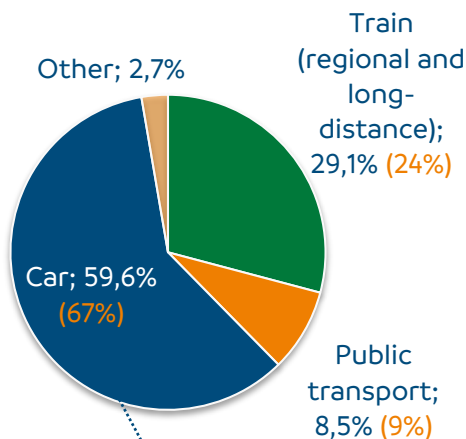
Which sources of information and media did you use during your cycling trips, e.g. for orientation?
(Only cycle tourists; n=10,055)



Day trippers and cycle tourists want to use environmentally-friendly means of transport for their outward/homeward journeys: increase in train travel

Which means of transport do you mainly use when you start your trip from somewhere other than home?

(Only people who started their day trip from somewhere other than home)

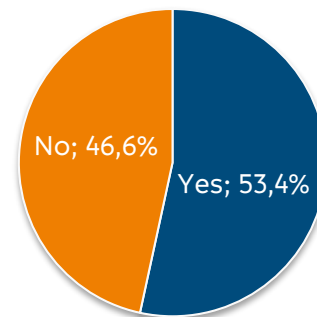


Numbers in brackets: comparison to 2021

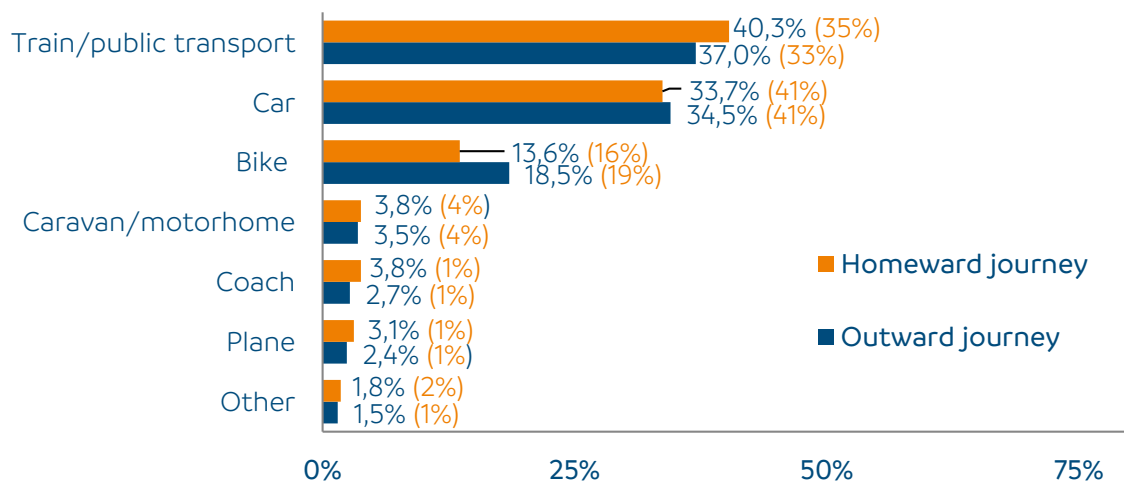
More day trippers travelled by train than in the previous year (+5%). Car usage decreased by around 7%.

Was the special €9 ticket offered in 2022 an incentive for going on the day trip?

(Only cyclists who started their day trip from somewhere other than home and travelled by train; unweighted n=1,224; only cyclists who used other means of transport)



How did you travel to the starting point of your main/most important cycling trip in 2022? And how did you travel home again?



Half of cycle tourists are dissatisfied with their travel by public transport.

Deutsche Bahn increased the number of bicycle parking spaces on long-distance trains by 13% compared to the previous year. This increase is due to the gradual introduction of new trains. Since 2019, more and more bikes have been transported on long-distance trains every year.

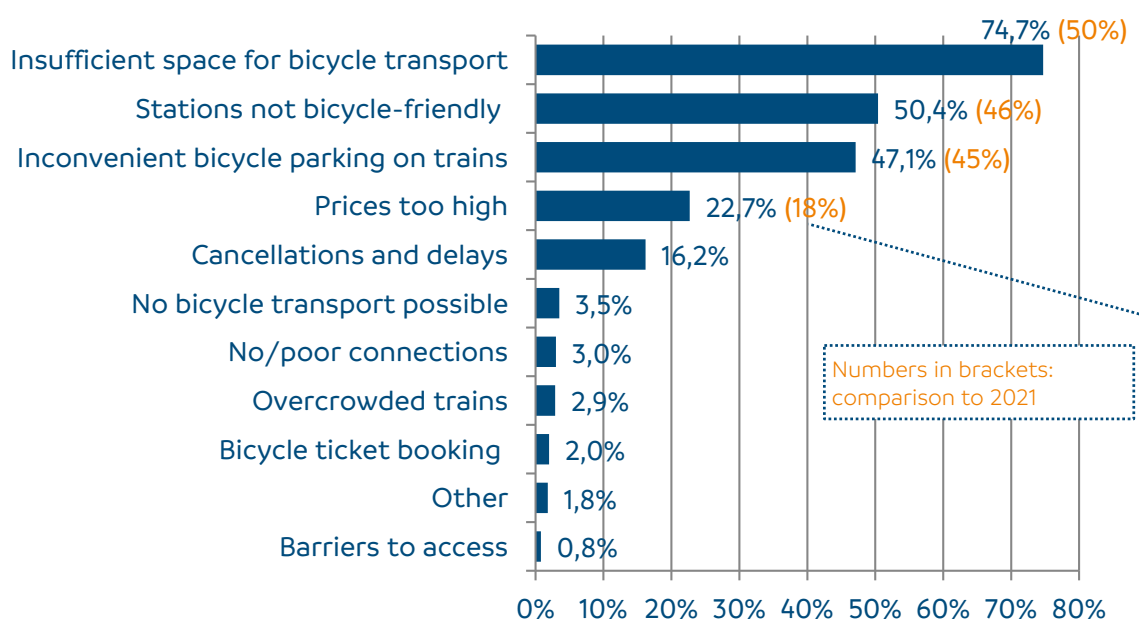
Bicycle transport	2019	2020	2021	2022	% change*
Long-distance (national)	393516	469907	510726	570371	11.68%
Long-distance (intl.)**	86232	52314	55983	78902	40.94%
Long-distance (total)	480350	522221	566709	649273	14.57%

Source: DB Fernverkehr AG (February 2023)

Regarding the question of how cyclists rate the quality of the route/region, the arrival and departure by train is rated the worst of all trip components. 50% (2021: 58%) stated that their outward/homeward journey was not problem-free.

What problems did you encounter when travelling by public transport?

(Only people who criticised the public transport ("The journey by public transport was possible without any problems": "Do not agree at all", "5" or "4"); unweighted n = 354)



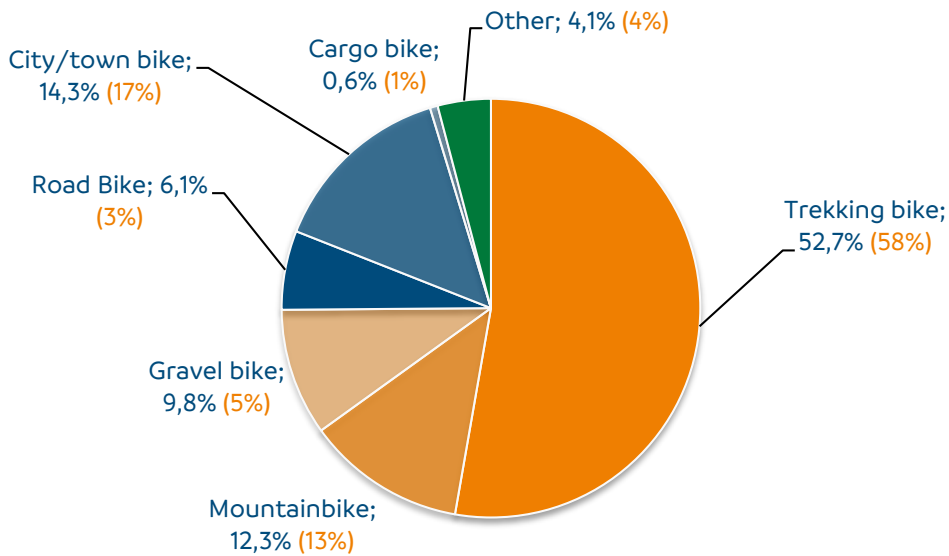
Cycle tourists wanted to use environmentally-friendly means of travel for their outward/homeward journeys. However, due to a lack of offers not all of them were able to. An adequate number of bicycle parking spaces, convenient access to bicycle compartments and easier bicycle storage is needed for long-distance transport. A great deal of potential moreover exists for the bicycle-friendly, barrier-free design of the railway stations. It can be assumed that the proportion of cycle tourists to travel by train could be increased considerably if additional capacity and cycle-friendly infrastructure were offered.

Cycle tourism is becoming more differentiated: gravel bikes are gaining in importance.

The variety of bicycle types used is growing. Trekking bikes are the #1 choice of cycle tourists. The development in the field of gravel bikes is particularly interesting though; their usage has increased by almost 5% compared to 2021.

Which type of bike did you mainly use during your cycling trip – regardless of whether it was an e-bike or not?

(Only persons to go on a cycling trip; n=1,770)



A similar differentiation can be seen among day trippers. Trekking bikes take first place (38%) here too, while city/town bikes (28%) take second place and mountain bikes third place (17%).

Hire bikes only play a minor role for day trips and long cycling trips.

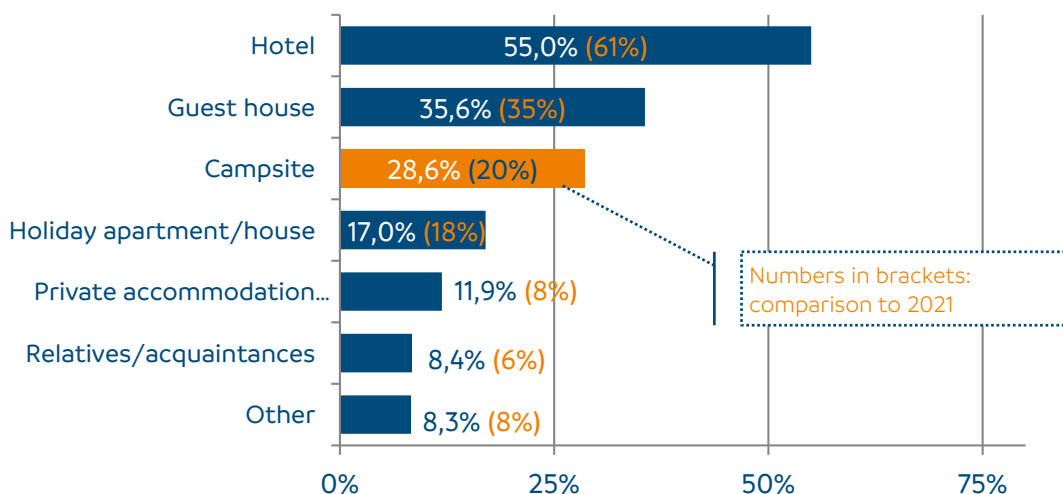
1% of day trippers used a hire bike (2021: 2%)

4.4% of cycle tourists used a hire bike (2021: 4%)

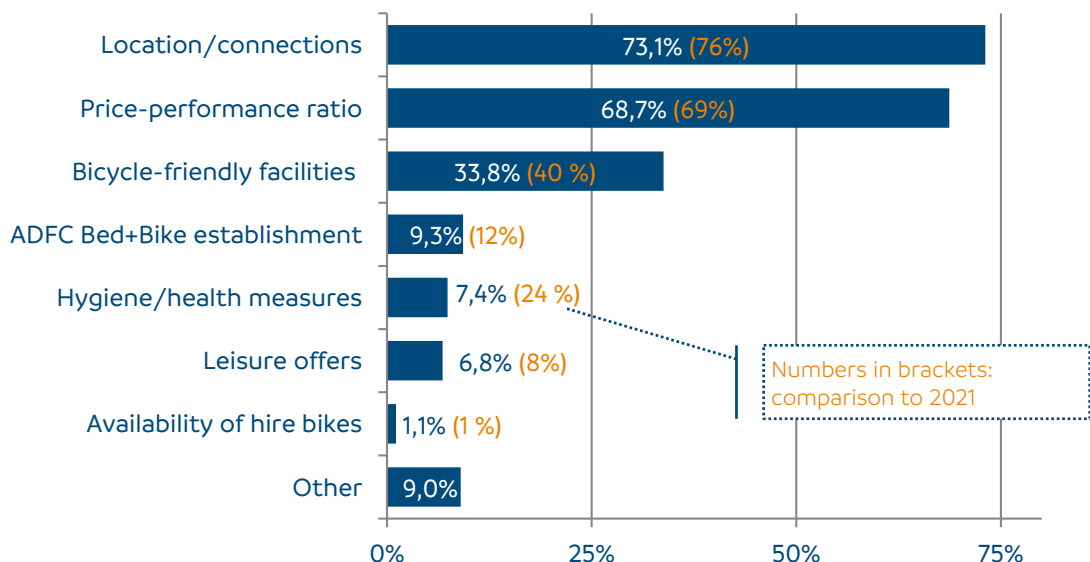
Camping is also growing in popularity among cycle tourists.

The general trend in tourism towards more overnight stays at campsites can also be discerned among cycle tourists. However, the data on the means of transport used for the outward journey (see p.10) suggests that cycle tourists are not increasingly using a motorhome for their outward journey, but rather opting to stay the night in a tent. This development fits with the growing desire for spontaneity and flexibility in travel as well as the possibility to make some travel components more affordable.

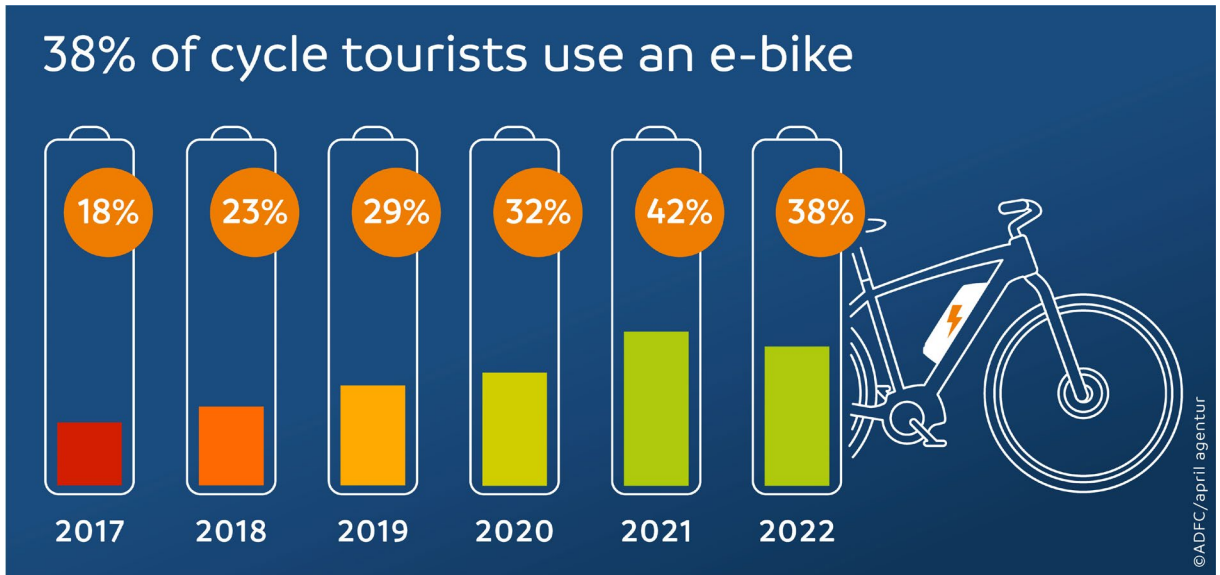
What type of accommodation did you use during your cycling trip?
(Only cycle tourists (point-to-point and circular tours); n=1,770)



What was important to you when choosing this accommodation?
(Only cycle tourists; n=1,770)



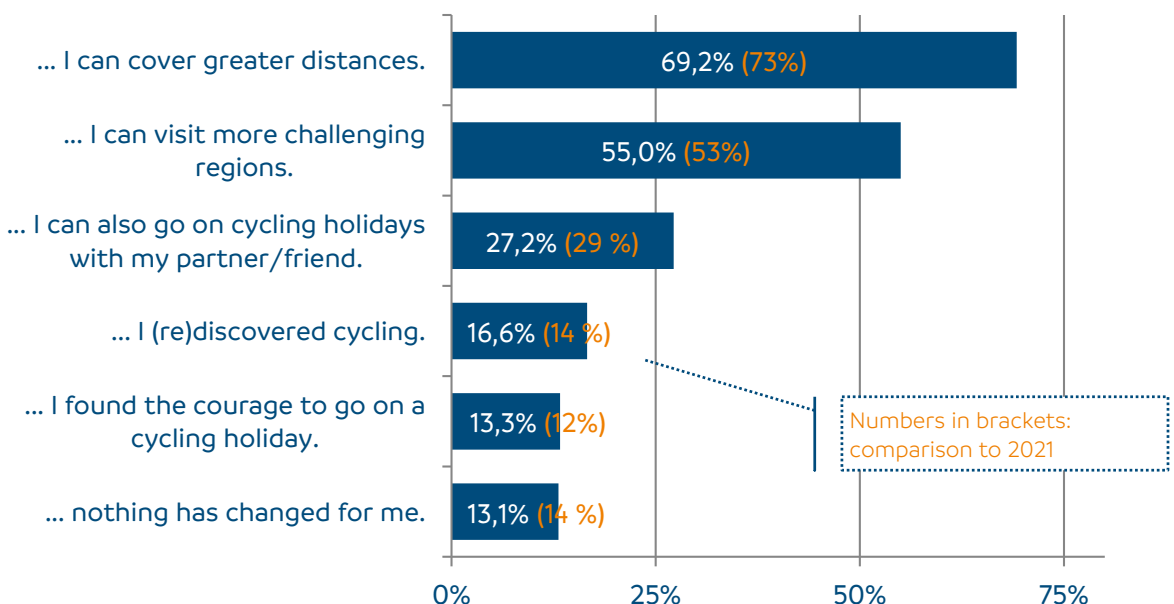
E-bikes allow greater distances to be covered and open up new regions to cycle tourists.



The proportion of e-bike users decreased slightly among cycle tourists. The proportion of e-bike users continued to increase among day trippers however, to 38.8% (2021: 33%).

Why did you choose to use an e-bike? Using an e-bike means ...

(Only cycle tourists who used an e-bike; n=582)

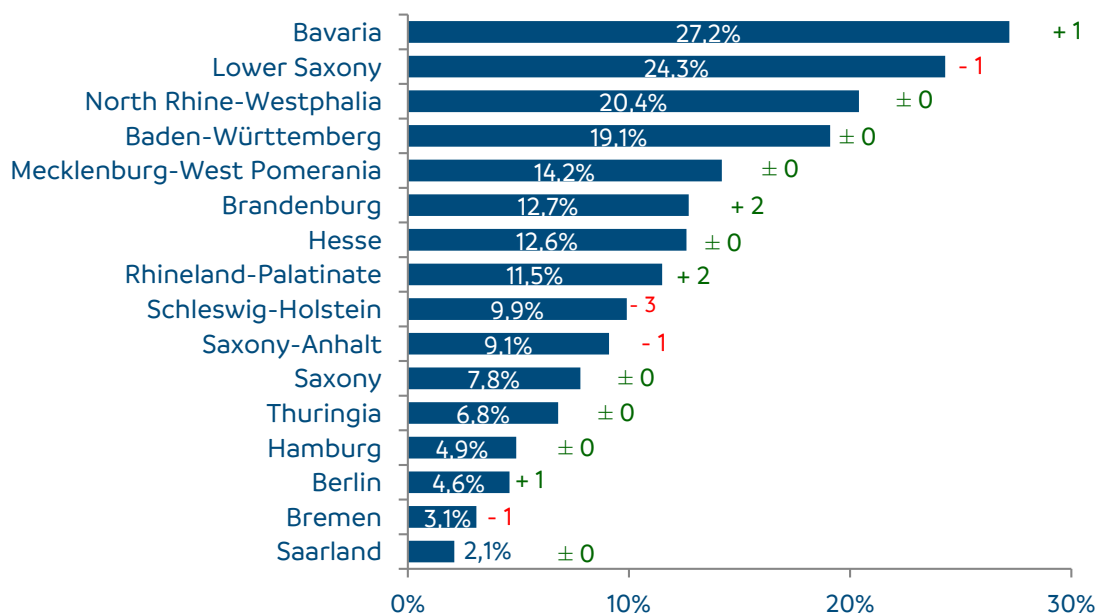


Ranking of German federal states

Most cycled German federal states in 2022

In which German federal states did you cycle in 2022?

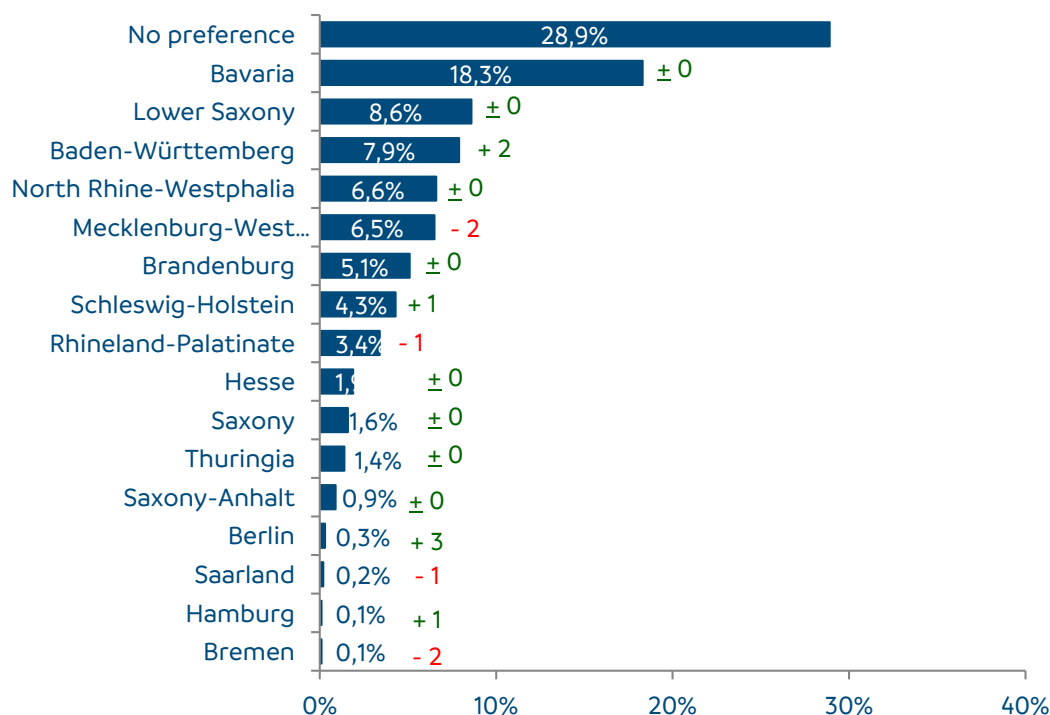
(Cyclists who went on cycling holidays in Germany; n=1,094)



Most popular federal states in 2022

In which federal state do you prefer to spend your cycling holidays?

(Cycle tourists: n=1,770)



Ranking of regions

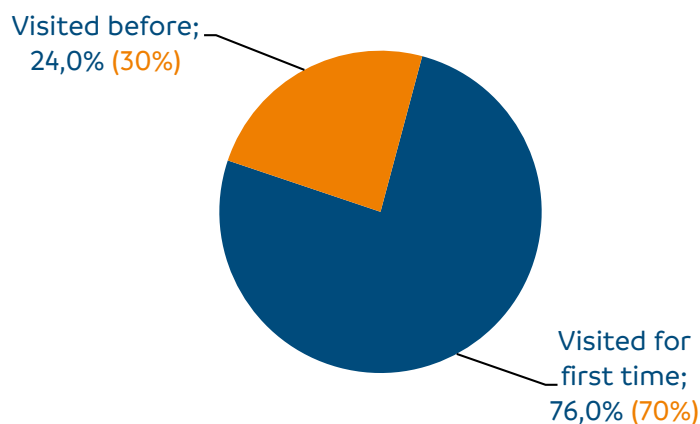
In which region did you spend your cycling holiday?

(Only cycle tourists who went on a cycling holiday in Germany and visited a region rather than a route; compared to 2020 – now with map support; n=341)



Did you visit the route/region for the first time or have you been there before?

(Only cycle tourists; basis unweighted n=1,770)

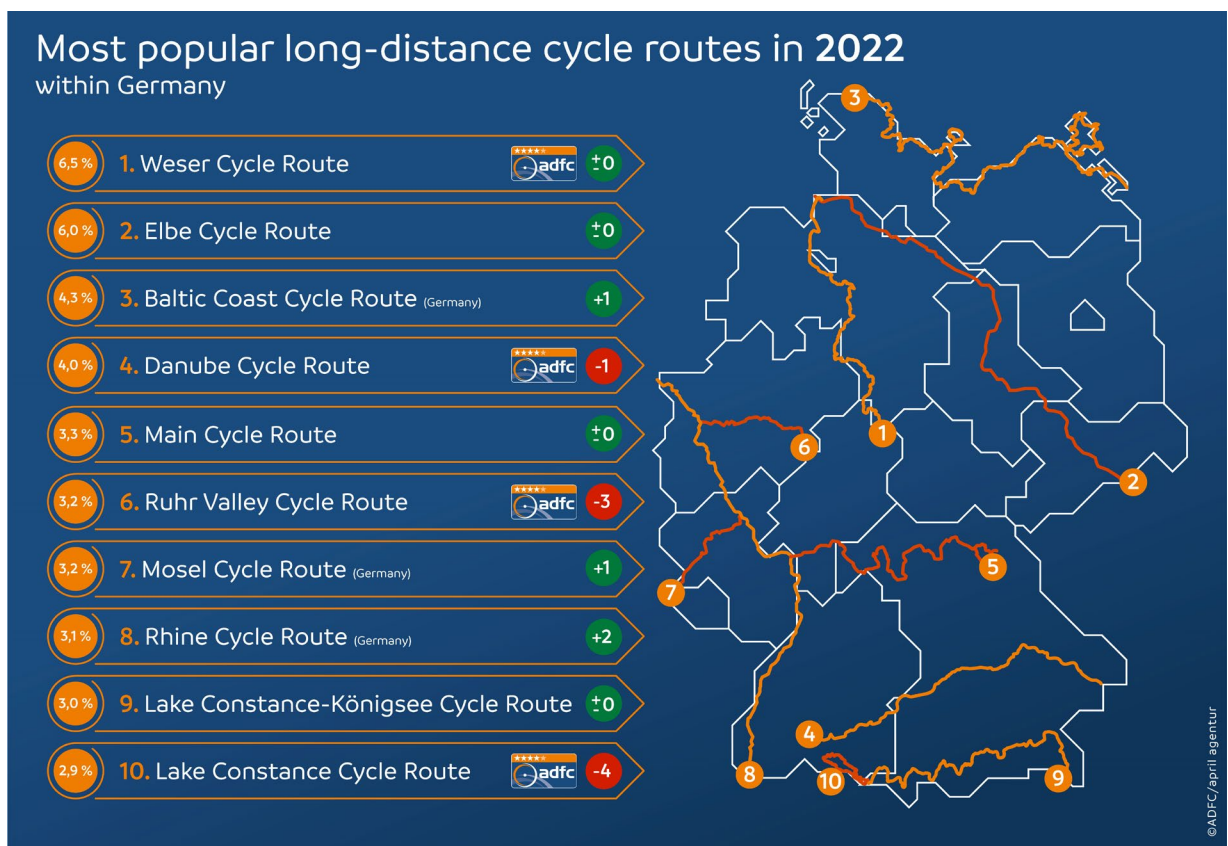
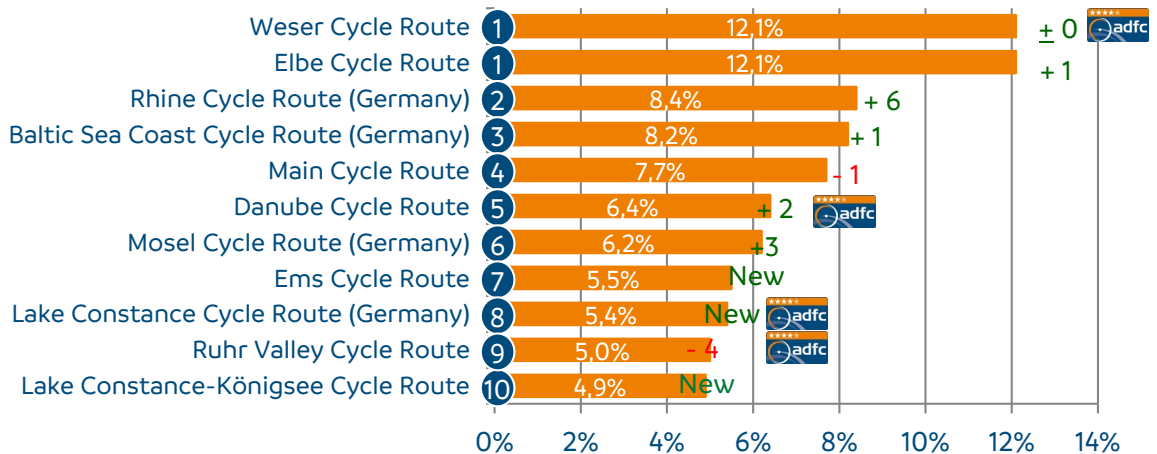


Ranking of long-distance cycle routes

Most cycled long-distance cycle routes in 2022

Which (long-distance) cycle routes did you cycle in 2022 during your multi-day cycling trips?

(Cycle tourists who went on a cycling holiday in Germany, only point-to-point cyclists; n=1,770)



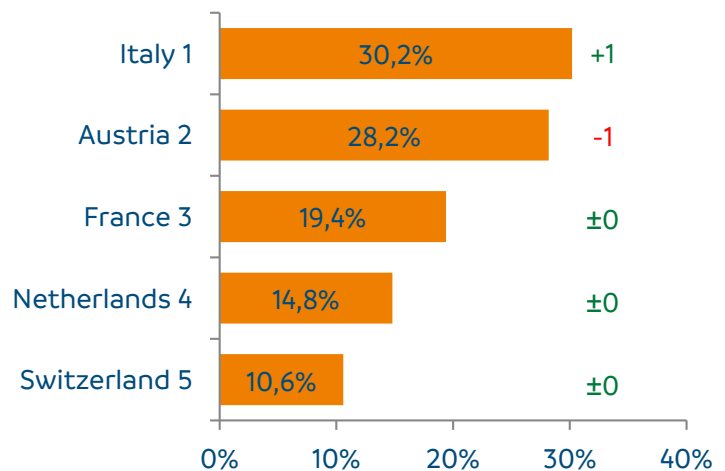
Catch-up effect? The proportion of cycling trips abroad has increased significantly compared to the previous year.



While only 22% of cycle tourists spent their holidays abroad in 2021, in 2022 this figure was 38.10%, which is even higher than in 2019 (33%).

In which countries outside of Germany did you go on multi-day cycling trips in 2022?

(Cycle tourists who went on a cycling holiday abroad; n=672)



Outlook: 2023 cycling year

- 74% (68%) of respondents are planning a cycling trip in 2023, 21% (28%) are still undecided.
- Especially those who went on a cycling trip in 2022 are also planning one in the coming year.
- 56% (76%) are planning a cycling trip within Germany and 50% (26%) within Europe.

ADFC products and services



ADFC Quality Routes

With its "ADFC Quality Routes" classification, the ADFC evaluates and acknowledges particularly high-quality long-distance cycle routes. Tourism professionals are commissioned to assess long-distance cycle routes from a cyclist's perspective and to award a rating of up to five stars if certain criteria are met.

ADFC Bicycle Travel Regions

With this certification, the ADFC has developed comparable criteria for attractive cycle tourism destinations. From the route infrastructure through the service offerings to marketing and transport connections, the cycling-friendliness of destinations is assessed.



Discover Germany by Bike

The ADFC has been showcasing a selection of the most beautiful long-distance cycle routes and cycle regions in Germany for over 20 years now with this special interest campaign. The magazine of the same name ('Deutschland per Rad entdecken') and the ADFC travel portal at www.adfc-radtourismus.de offer cycling enthusiasts tips for selecting their route as well as planning and preparing cycling trips.

Bett+Bike

More than 5,900 establishments in Germany and Europe have been certified as bicycle-friendly Bett+Bike accommodation and thus set quality standards for cycle tourism.



ADFC TourGuide

The ADFC offers guided cycling tours all over Germany. The certified ADFC TourGuides afford local knowledge and guide groups safely and competently while also providing technical assistance. For more information on guided bike tours and events, see touren-terminen.adfc.de.

The following cycle routes and regions were acknowledged at the ITB 2023:

ADFC Quality Routes

Neusiedler See Radweg 5*
Drauradweg 5*
Diemelradweg 5*
Vennbahn 4*

Peace Route 4*
Iller-Radweg 4*
Radrunde Allgäu 4*
Weser Cycle Route 4*

ADFC Bicycle Travel Regions

RadReiseRegion HellwegBörde
Seenland-Oder-Spree