



ADFC-Radreiseanalyse 2024

for the 2023 cycling year



Agenda

1. Methodology
2. Segment overview
3. Segments in detail
4. Travel destinations
5. Outlook



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The ADFC and cycle tourism

Interest representation



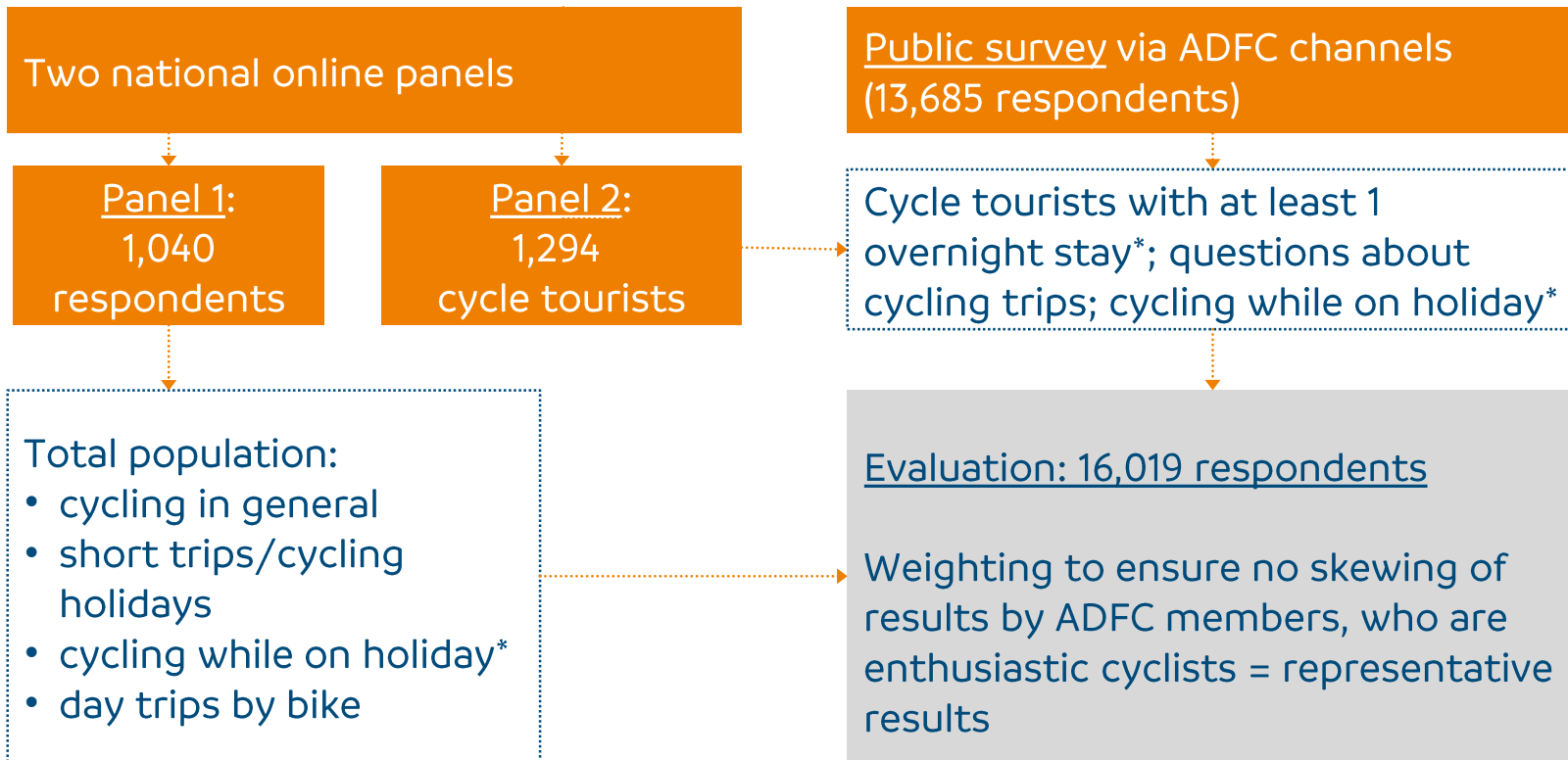
Focus areas



Products and services



Methodology



Respondents aged 18+ | * New survey questions

SEGMENT OVERVIEW

Cycle tourism at a glance

Cycling trips | 3+ nights
Cycling as main trip motive



New

Cycling trips | 1-2 nights
Cycling as main trip motive



New

No cycling trips
No cycling trips in 2023
or the past three years



Cycling while on holiday
Different main trip motive,
but cycled while on holiday



New

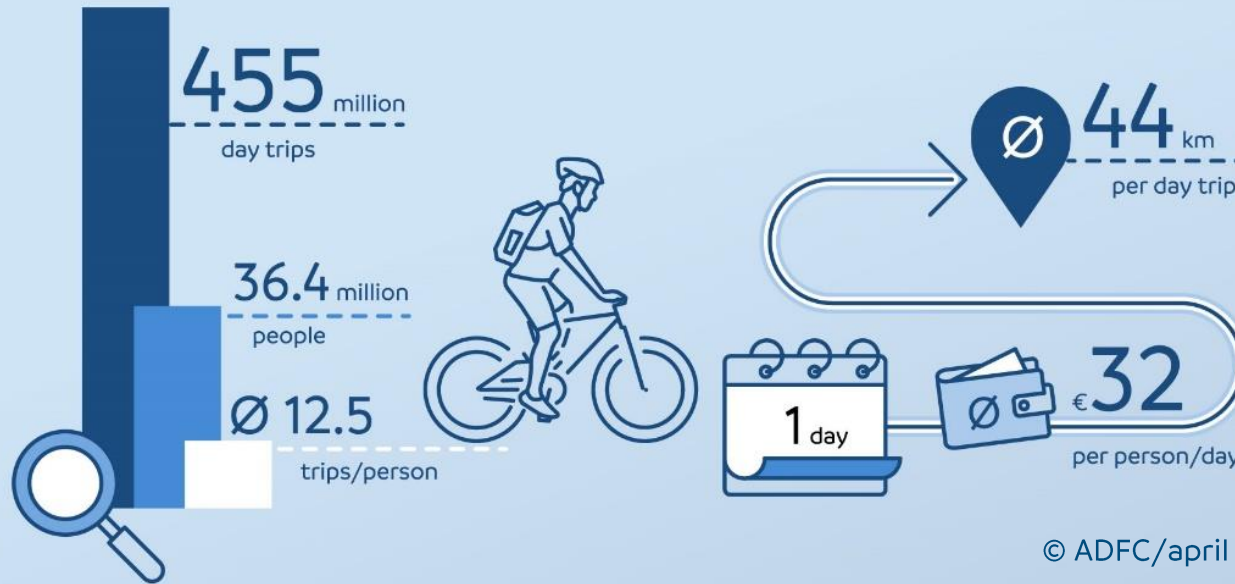
Day trips by bike
Trips during free time (not
while on holiday), without
any overnight stays



Number of day trips continues to increase

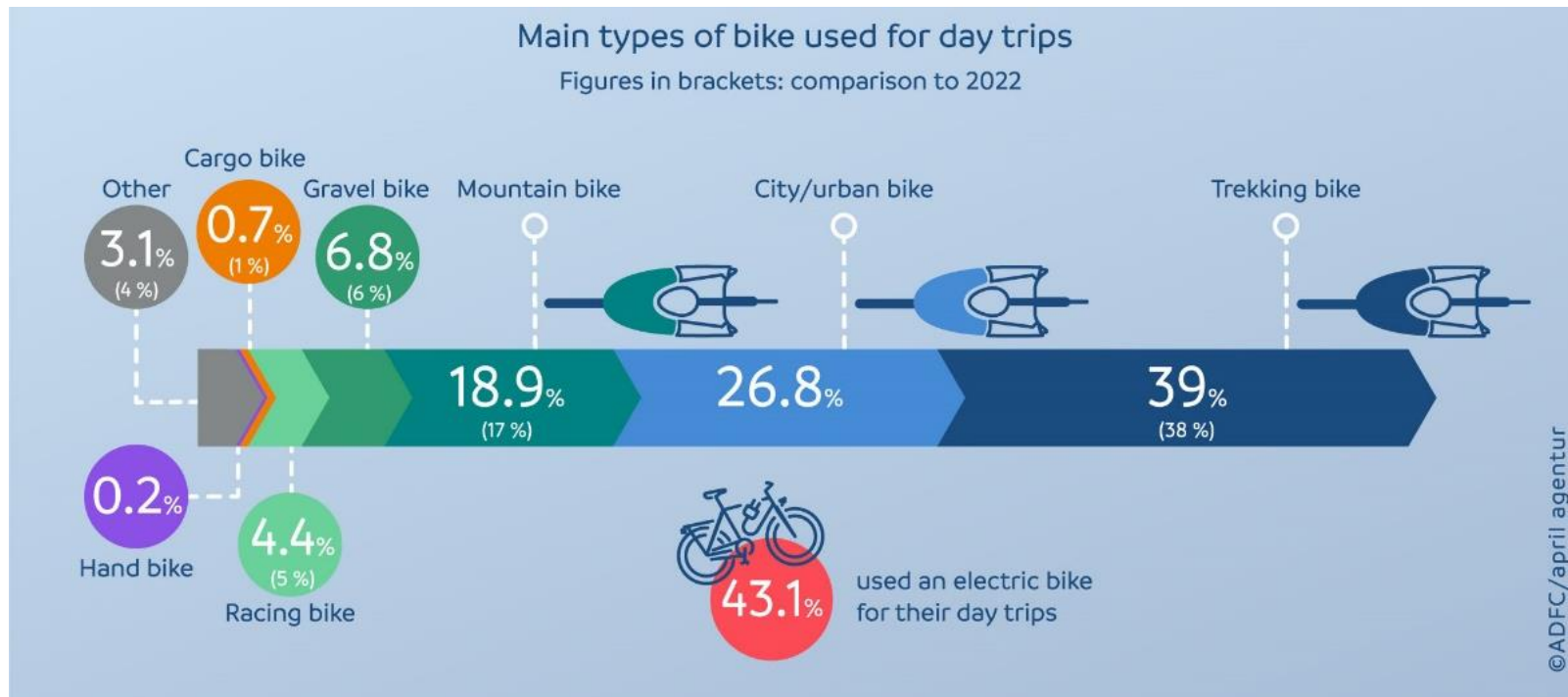
Day trips by bike in 2023

Trips by bike during leisure time (not holidays), with no overnight stays



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Day trips: gravel and mountain bikes grow in popularity



Reference: Only cycle tourists in 2023; n = 4,516

Surveyed for first time: cycling while on holiday



New

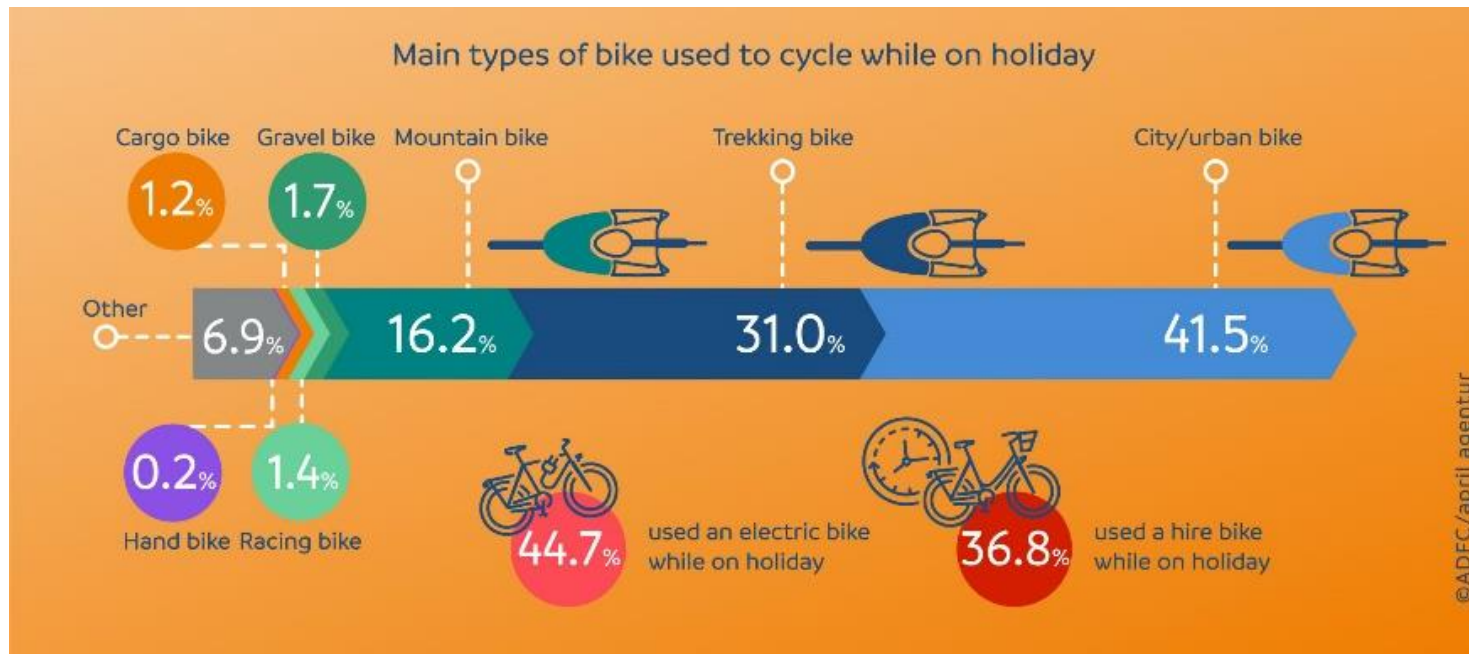
Cycling while on holiday in 2023

Different main trip purpose, but a bike was used (occasionally)



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City bikes most popular for cycling while on holiday



Reference: People who cycled while holiday in 2023; n = 1,816



Top 5 reasons for cycling while on holiday



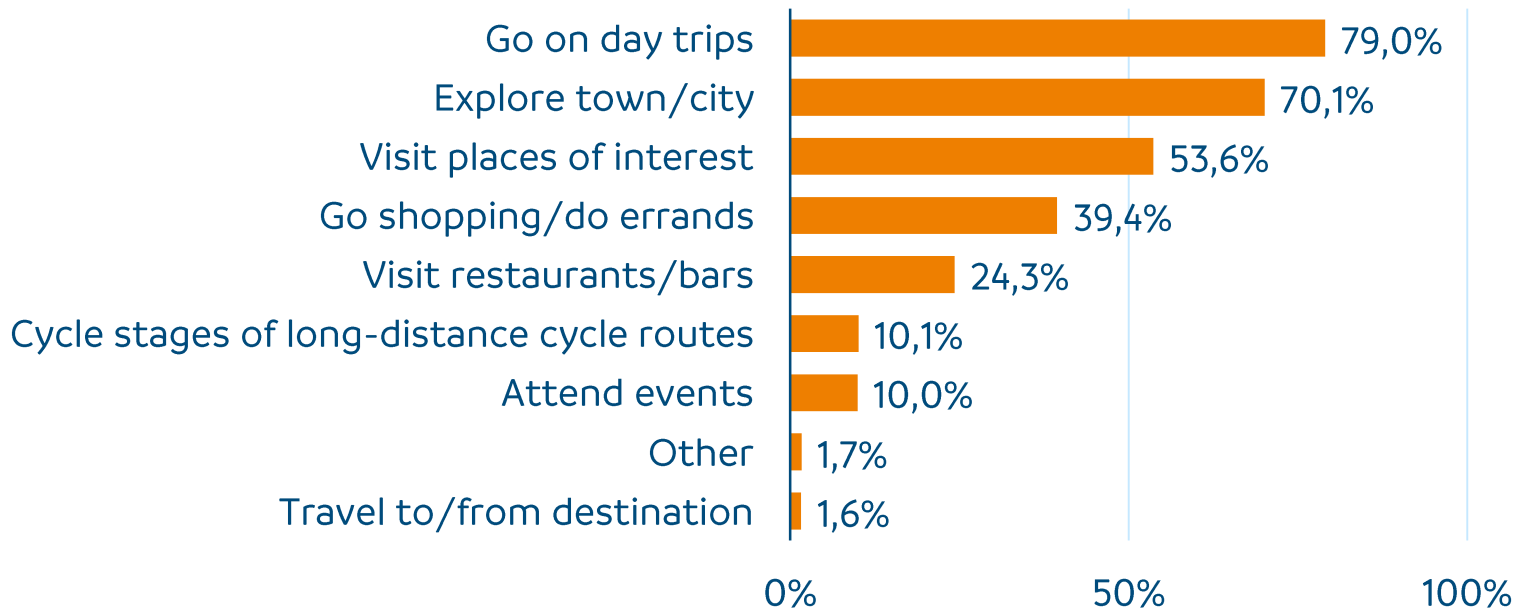
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Reference: People who cycled while on holiday (at least one trip in 2021/22/23); n = 3,623 (multiple answers possible)

Clear focus on tourist activities



What did you use your bike for while on holiday?



Reference: People who cycled while on holiday (at least one trip in 2021/22/23); n = 3,623 (multiple answers possible)

Surveyed for first time: short trips by bike



New

Trips in 2023 where cycling was the main purpose

Trips with 1-2 overnight stays. Main motive: cycling



Top 5 reasons for short trips by bike



Reference: Cycle tourists in 2021/22/23; n = 6,023 (multiple answers possible); 17 with no response

Fewer cycle tourists on the roads in 2023



Trips in 2023 where cycling was the main purpose

Trips with 3+ overnight stays. Main motive: cycling



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Top 5 reasons for longer cycling trips



Top 5 reasons for longer cycling trips

1

See more of the place and its people



2

Be active on holiday



3

Explore routes only accessible by bike



4

Environmentally-friendly, climate-conscious travel



5

Do something for one's health

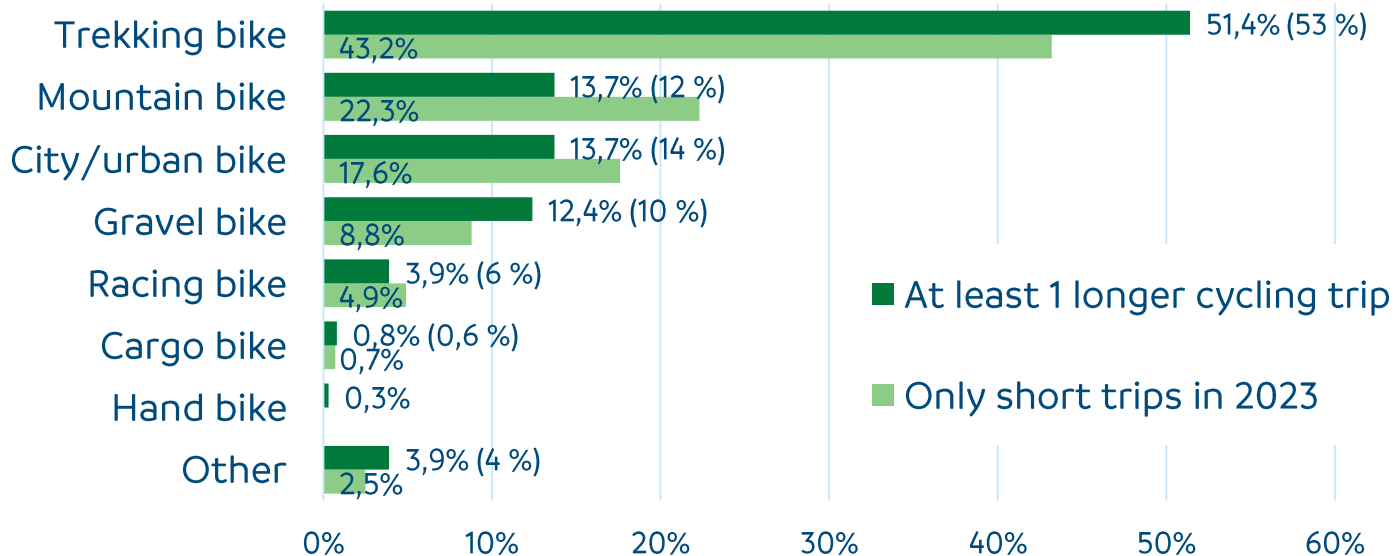


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Reference: Cycle tourists in 2021/22/23; n = 6,023 (multiple answers possible); 17 with no response

Main type of bike used

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



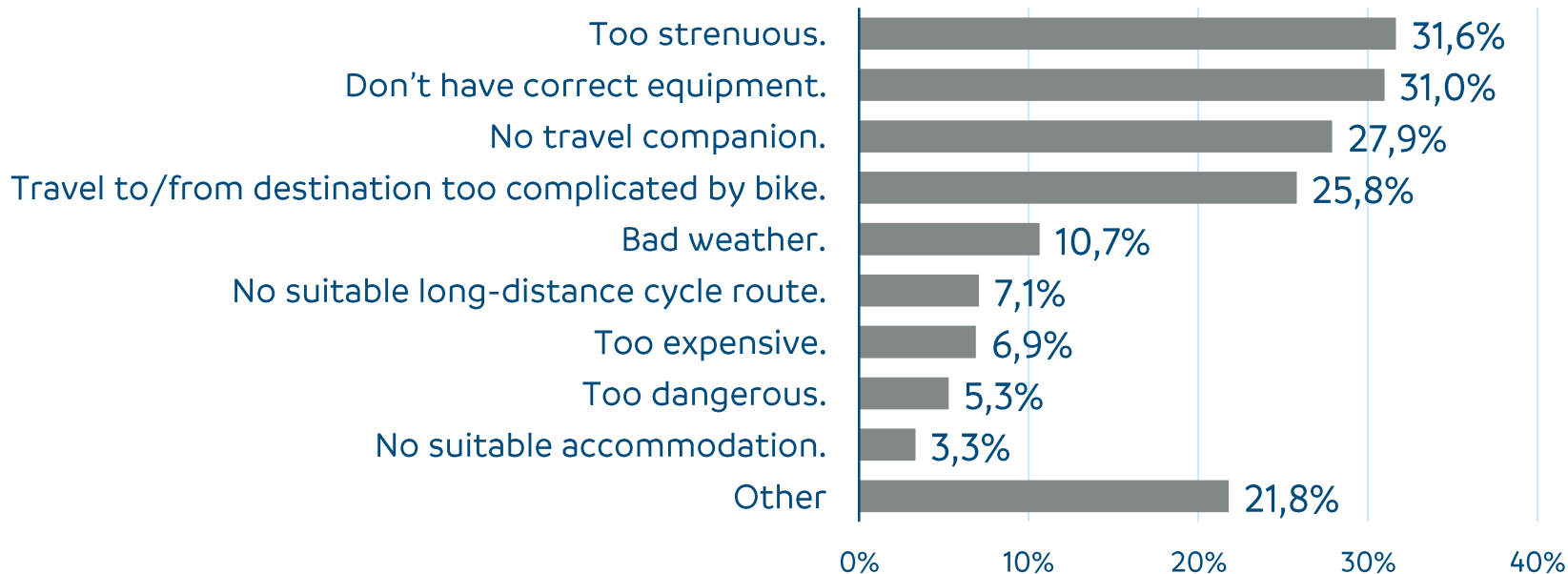
Reference: Only cycle tourists in 2023; n = 4,516 | Figures in brackets: comparison to 2022

Cycling trips too strenuous main reason for no trips



New

Why didn't you go on any cycling trips in the past three years?
Indicate the main reasons.

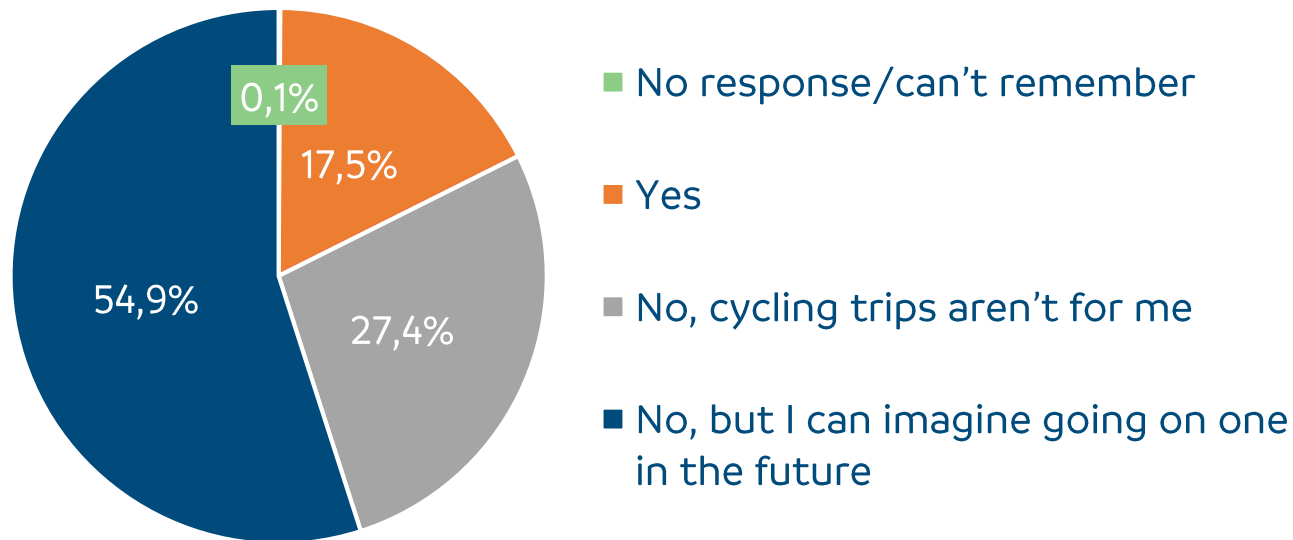


Reference: People who did not travel by bike in the past 3 years; n = 6,472 (multiple answers possible)

Tremendous potential among non-cyclists



Have you ever been on a cycling trip?



Reference: People who did not go on a cycling trip in the past three years; n = 6,472 (multiple answers possible)

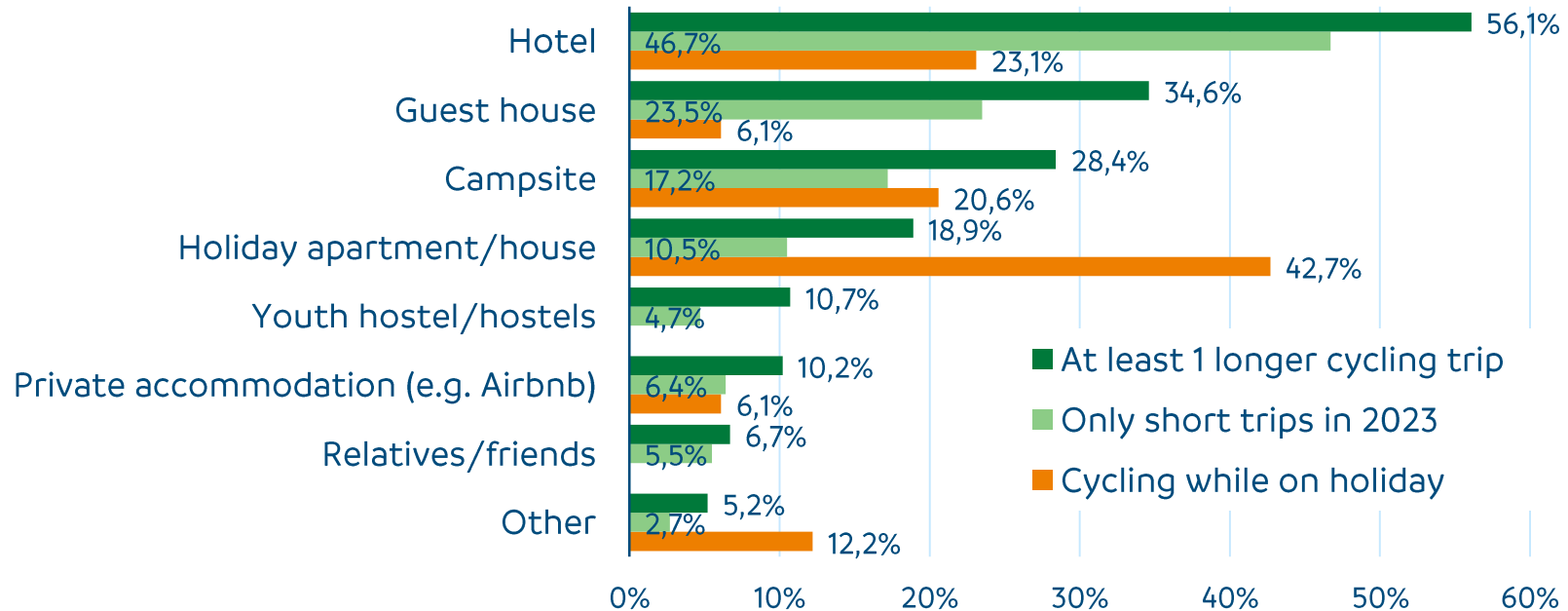
SEGMENTS IN DETAIL

Accommodation, mobility, media
usage and spending

Accommodation preferences vary



Which type(s) of accommodation did you use during your (cycling) trip(s)?



Reference: People who cycled on holiday in 2023, n = 1,816; Cycle tourists in 2023; n = 4,516 (multiple answers possible)

Top 5 criteria for choosing accommodation



Cycling while on holiday

Cycling trips with 1–2 nights

Cycling trips with 3+ nights

1. Value for money (63.9%)	Location (68.1%)	Location (68.0%)
2. Location/connections (54.8%)	Value for money (67.2%)	Value for money (65.8%)
3. Recreational offers (31.6%)	Secure bike parking (41.8%)	Secure bike parking (46.6%)
4. Secure bike parking (30.4%)	No min. stay length (33.2%)	No min. stay length (44.4%)
5. Hire bike offers (10.7%)	Bike-friendly facilities and services (23.8%)	Bike-friendly facilities and services (24.4%)

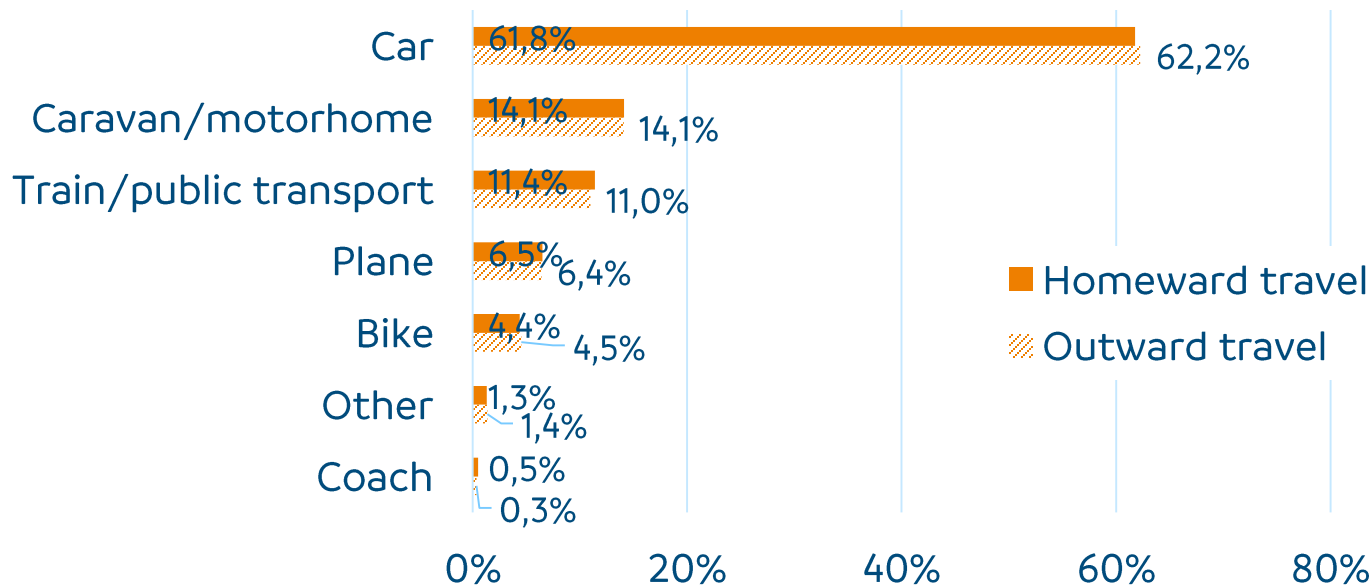
Reference: People who cycled on holiday, n = 1,816; only cycle tourists in 2023; excluding overnight stays in private accommodation; n = 4,448 (multiple answers possible)



Outward/homeward travel for cycling holidays



Which means of transport did you use for your outward and homeward travel for this cycling holiday?

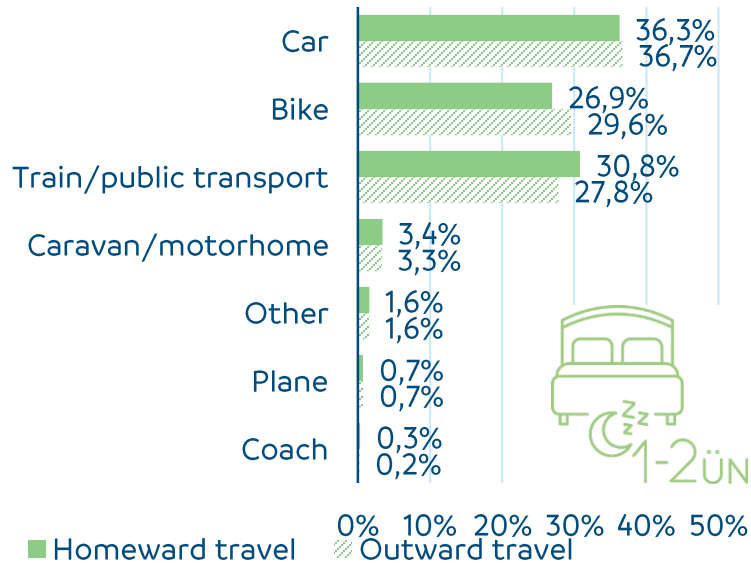


Reference: People who cycled while on holiday in 2023; n = 1,816

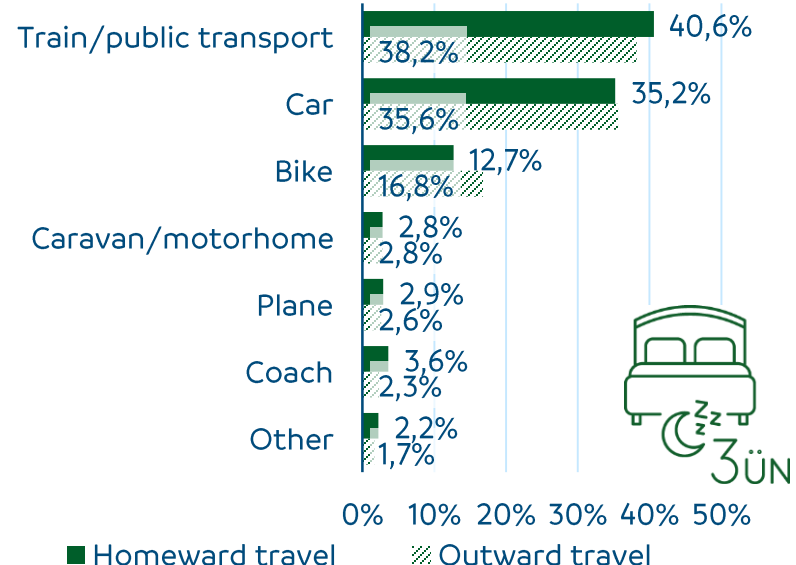
Outward/homeward travel for cycling trips

Which means of transport did you use for your outward and homeward travel for this cycling trip?

Short cycling trips



Cycling trips with 3+ nights

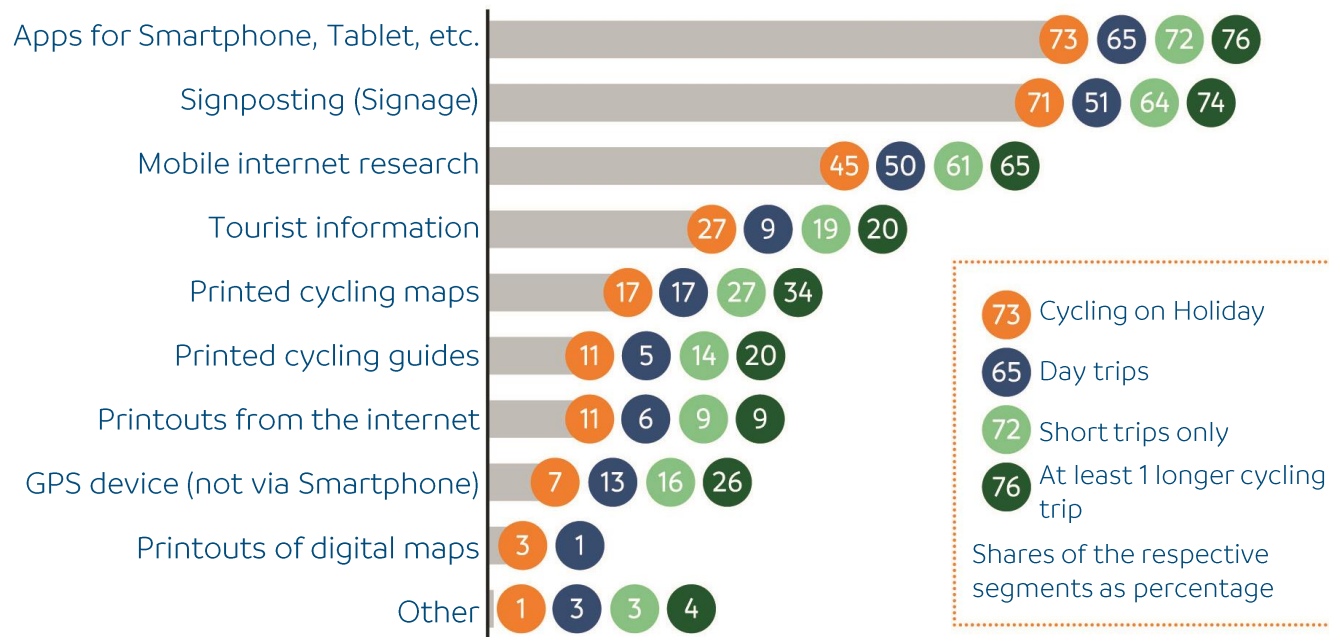


Reference: Only cycle tourists in 2023; n = 4,516

Orientation during cycling trips



Which sources of information and media did you use, e.g. for orientation?

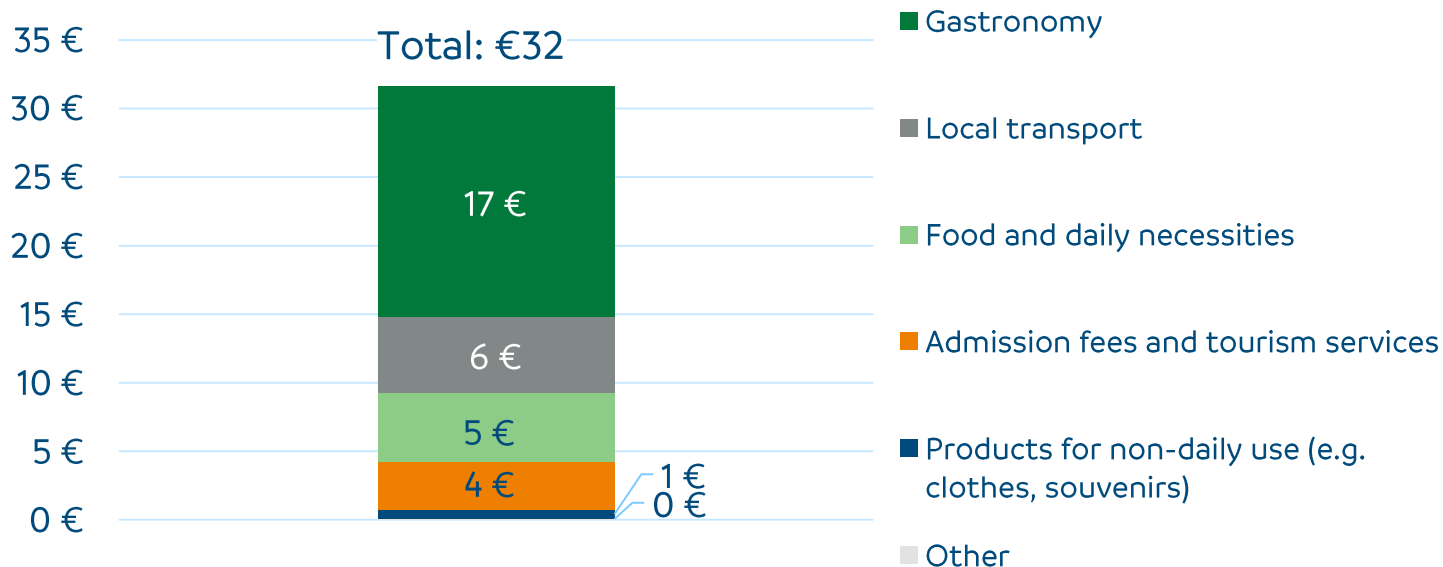


10,416 ; People who cycled while on holiday (at least one trip in 2021/22/23), n = 3,623; Cycle tourists in 2021/22/23, n = 6,021 (multiple answers possible for all)

Spending per person and day trip



How much money did you spend on average (per person and trip) during your day trips by bike?

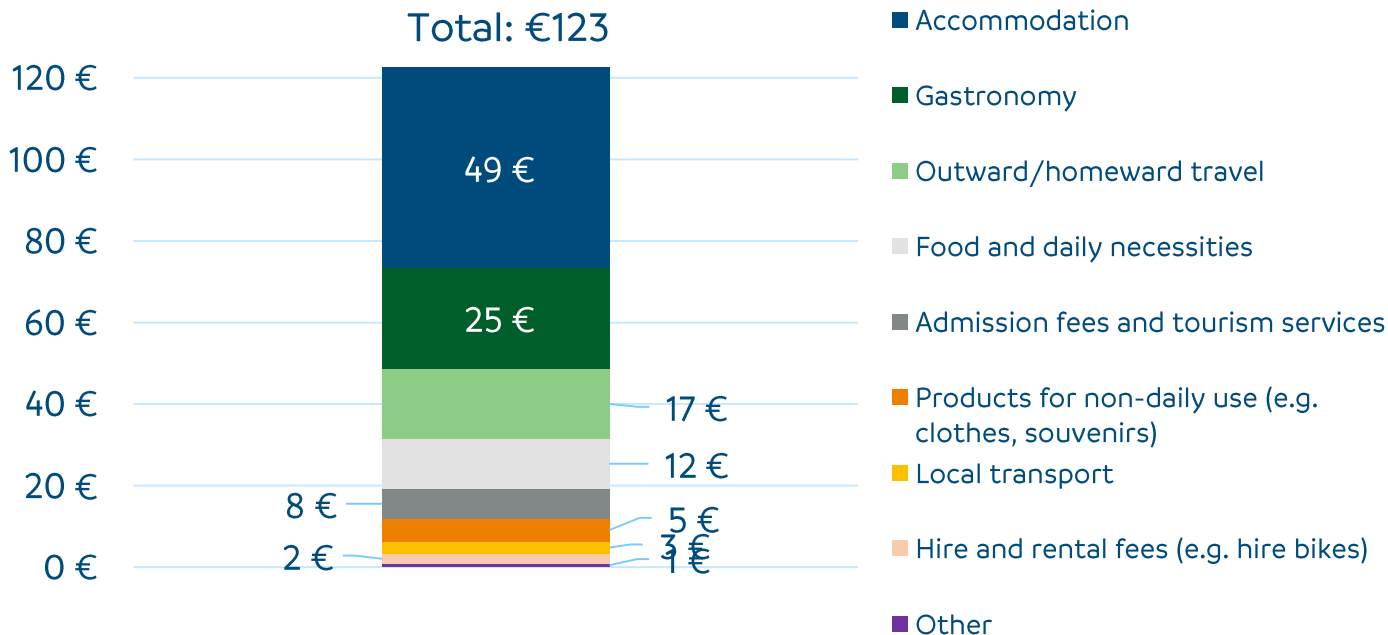


Reference: Day trippers in 2023; n = 10,416 | Excluding costs for outward/homeward travel

Spending per person and day on bike trips



How much money did you spend on average per person and day?

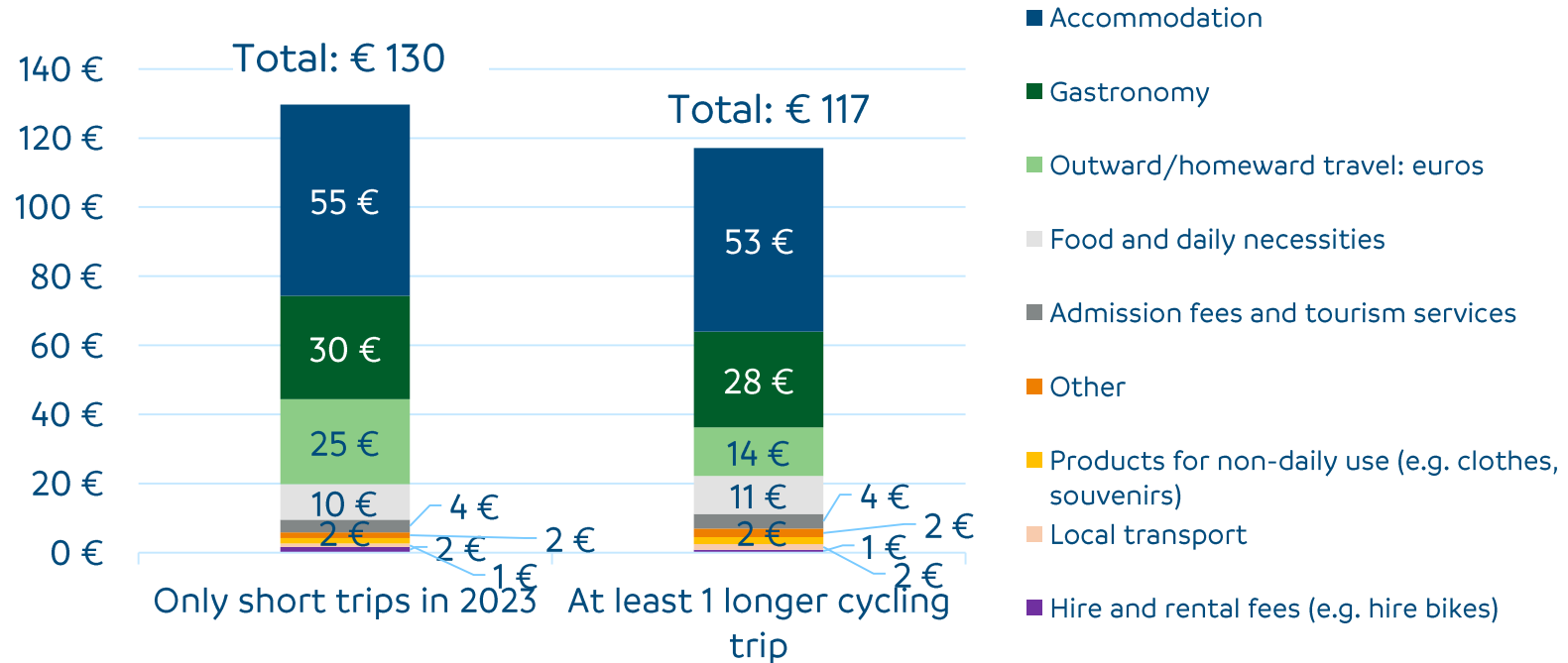


Reference: People who cycled while on holiday in 2023; n = 1,816 | Incl. proportionate outward/homeward travel

Spending per person and day on cycling trips



How much money did you spend on average per person and day?



Reference: Only cycle tourists in 2023; n = 4,516 | Daily spending incl. outward/homeward travel, calculated per day

Estimated total spending

The respondents' estimates of their spending can be used to calculate the total spending for the individual cycle tourism segments. Accordingly, the total spending for the individual segments was as follows in 2023:



- €14–15 billion spent on day trips



- €2–3 billion spent on short cycling trips

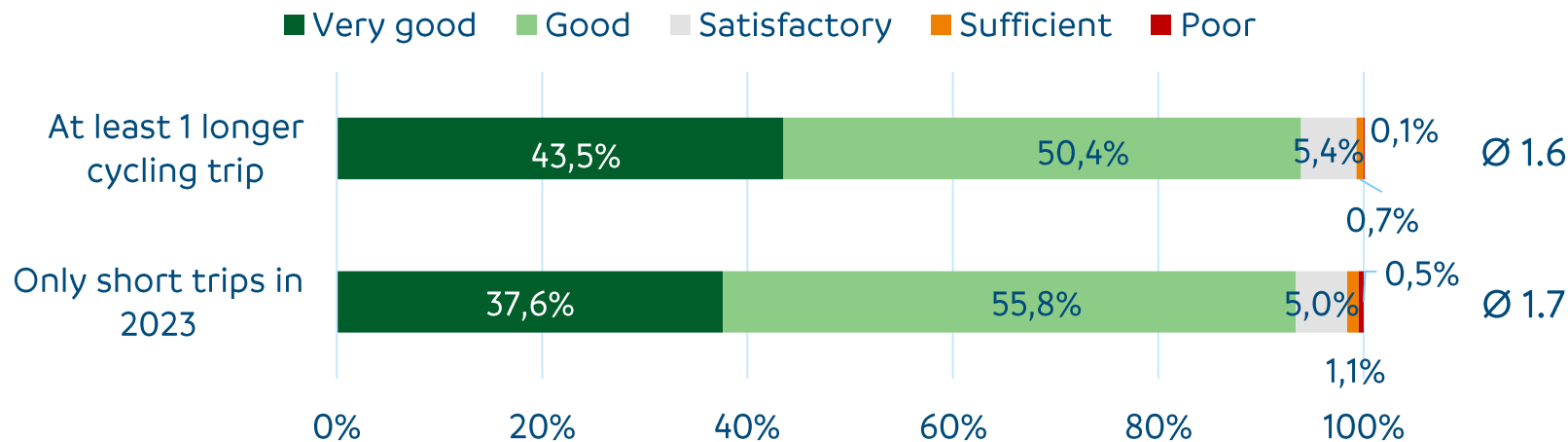


- €6–7 billion spent on cycling trips with 3+ nights

Satisfaction with cycling trip

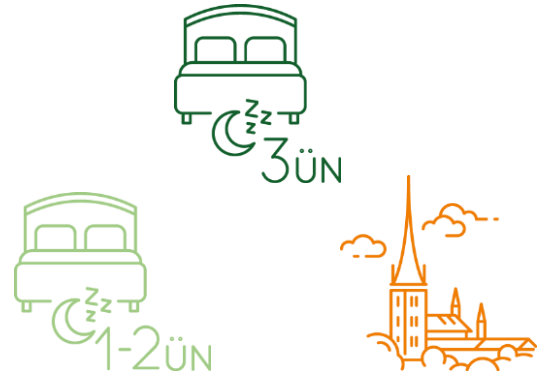


How would you rate your main cycling trip in 2023 overall?



Reference: Only cycle tourists in 2023; n = 4,515; 1 with no response

TRAVEL DESTINATIONS



Federal states visited by trip type

	Cycling while on holiday	Cycling trips with 1–2 nights	Cycling trips with 3+ nights
1.	Mecklenburg-West Pomerania (23.2%)	North Rhine-Westphalia (22.4%)	Bavaria (27.7%)
2.	Schleswig-Holstein (18.1%)	Bavaria (22.3%)	Lower Saxony (22.3%)
3.	Lower Saxony (17.6%)	Lower Saxony (16.1%)	North Rhine-Westphalia (19.0%)
4.	Bavaria (15.4%)	Baden-Württemberg (14.5%)	Baden-Württemberg (17.8%)
5.	Baden-Württemberg (9.0%)	Rhineland-Palatinate (9.1%)	Mecklenburg-West Pomerania (12.5%)
6.	North Rhine-Westphalia (6.1%)	Hesse (8.2%)	Rhineland-Palatinate (10.2%)
7.	Brandenburg (5.6%)	Brandenburg (7.5%)	Schleswig-Holstein (10.2%)
8.	Saxony (5.1%)	Mecklenburg-West Pomerania (6.6%)	Hesse (10.1%)
9.	Rhineland-Palatinate (4.7%)	Saxony-Anhalt (6.0%)	Brandenburg (9.9%)
10.	Hesse (3.1%)	Saxony (5.8%)	Saxony-Anhalt (7.8%)
11.	Saxony-Anhalt (2.5%)	Schleswig-Holstein (4.4%)	Saxony (7.2%)
12.	Thuringia (2.3%)	Thuringia (4.2%)	Thuringia (5.1%)
13.	Berlin (2.0%)	Berlin (1.2%)	Berlin (4.0%)
14.	Hamburg (1.5%)	Hamburg (1.1%)	Hamburg (3.5%)
15.	Saarland (1.1%)	Saarland (0.9%)	Bremen (3.1%)
16.	Bremen (0.5%)	Bremen (0.2%)	Saarland (1.5%)



Reference: Cycling while on holiday in Germany in 2023, n = 1,015; cycling trips in Germany in 2023, n = 2,889 (multiple answers possible)

Most popular long-distance cycle routes in 2023



Meist befahrene Radfernwege 2023 in Deutschland

10,2 %	1. Weser-Radweg	adfc	+0
9,6 %	2. Elberadweg		-1
7,2 %	3. Ostseeküstenradweg (Deutschland)		+0
6,2 %	4. Donauradweg	adfc	+1
6,2 %	4. Rheinradweg (Deutschland)		-2
6,0 %	5. MainRadweg		-1
4,9 %	6. RuhrtalRadweg	adfc	+3
4,7 %	7. Bodensee-Königssee Radweg		+3
4,4 %	8. EmsRadweg		-1
4,3 %	9. Bodensee-Radweg (Deutschland)	adfc	-1
4,0 %	10. Mosel-Radweg (Deutschland)	adfc	-4



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Most popular cycling regions in 2023



Meist befahrene Radregionen 2023 in Deutschland

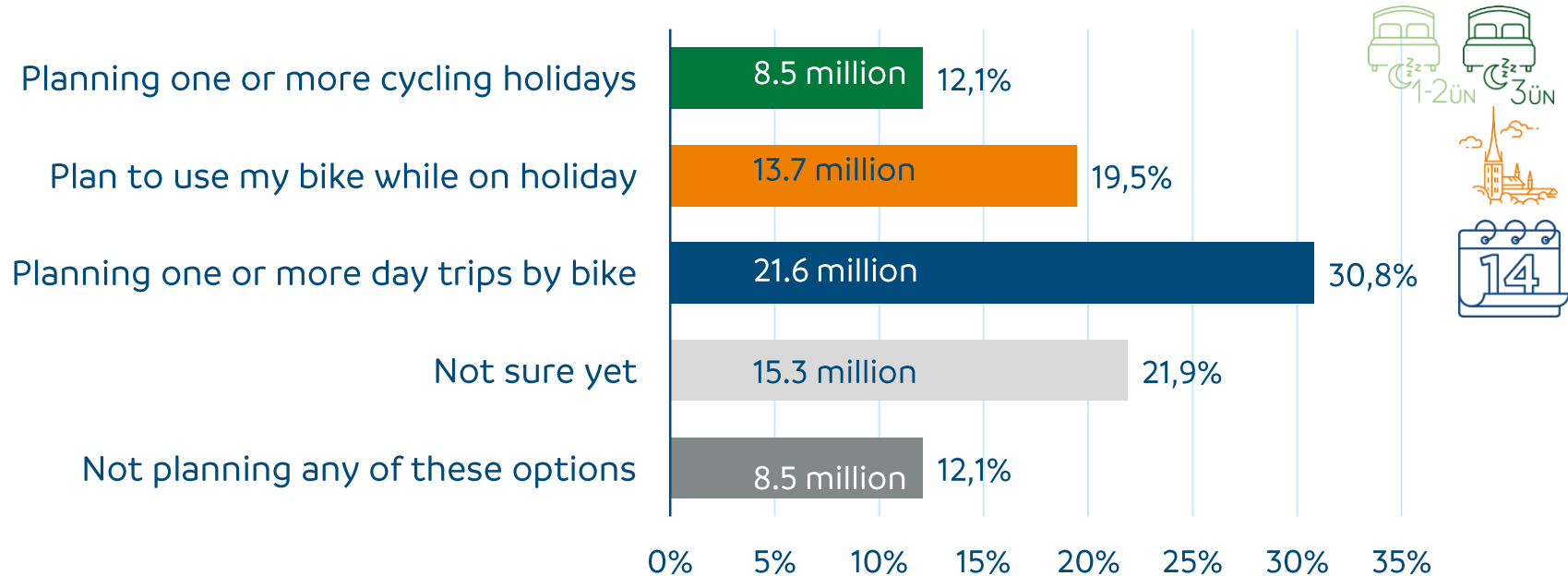
5,9%	1. Grafschaft Bentheim/Emsland/ Osnabrücker Land	+1
5,4%	2. Bodensee	-1
4,7%	3. Ostsee (Schleswig-Holstein)	+1
4,6%	4. Nordseeküste (Niedersachsen)	+1
4,5%	5. Allgäu	-2
4,2%	6. Mosel-Saar	+1
4,0%	7. Mecklenburgische Schweiz/ Seenplatte	-1
3,8%	8. Münsterland	±0
3,0%	9. Nordsee (Schleswig-Holstein)	±0
3,0%	9. Mecklenburgische Ostseeküste	neu
2,4%	10. Ostfriesland	neu
2,4%	10. Rügen/Hiddensee	±0



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Outlook

What are your cycling plans for 2024?



Reference: German population; n = 1,042 (multiple answers for the first three options)

The longer the cycling trip, the greater the motivation to cycle more in everyday life

- Every second cycle tourist (3+ nights) cycles more often in their everyday life after their cycling trip. This figure has risen slightly compared to the previous year.
- Among the cyclists to go on a short cycling trip, 41.8% cycled more in their everyday life after their cycling trip.

Reference: All people who went on at least 1 day trip or at least 1 cycling holiday; n = 10,747

Conclusions

1. More than half of the population of Germany cycles while on holiday and/or during day trips.
2. Spending on cycling holidays and cycling while on holiday tends to be above average.
3. In 2023, there were fewer cycling trips but more day trips than in the previous year.
4. Overall, people are (very) satisfied with their cycling holidays. To ensure this remains the case, the cycle tourism infrastructure must continue to be developed and investments must be made in quality. All cycle tourism stakeholders must also cooperate.
5. Cycle tourists' plans for 2024 give hope for growth in all segments.



Sources and acknowledgements

Our thanks to:

- The cycle tourism experts at the ADFC and the state tourism organisations
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Download: Report on the 2024 ADFC Bicycle Travel Analysis

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