

Tourism policy positions of the German National Cyclists' Association (ADFC)

Preliminary note

The German National Cyclists' Association (ADFC) has been an advocate of cycling and cyclists' concerns for more than thirty years now. Cycling during leisure time and while on holiday are a key component here. For the ADFC, promoting cycle tourism involves creating target group-oriented offers for German and foreign cycle tourists for (cycling) holidays as well as for cycling during leisure time. The ADFC is active both as a lobby association and an advisor for the tourism industry. It is committed to a holistic view of the tourism services chain – from the route infrastructure through the signage to travel to and from destinations, bicycle-friendly accommodation, accompanying service facilities, and target group-oriented marketing of products.

In light of countless social trends, the cycle tourism market has experienced stable growth for many years now. Today, classic cycle tourism (touring, not including mountain biking or racing bike holidays) makes up around twelve per cent of the total tourism value added in Germany with net value added of €7.3 billion per year [cf. Trendscope, 2013].

The future development of cycle tourism is also dependent on public infrastructure. In order to unlock the considerable potential of cycle tourism in full in the future, sustained commitment from the private sector coupled with continued targeted political support and funding are desirable.

The potential of cycle tourism

1. Cycle tourism strengthens tourism in Germany and creates jobs

Over 80% of all cycling holidays already take place within Germany [cf. 2016 ADFC Bicycle Travel Analysis]. In light of the in part unstable international political situation, there is a growing tendency among Germans to consider their own country as a travel destination more often. And this is having a positive impact on cycle tourism. Employing around 186,000 people, the provider structure of cycle tourism means that it primarily bolsters small and medium-sized businesses [cf. Baseline Study on Cycle Tourism].

2. Cycle tourism reinforces economic structures in rural areas

In economically underdeveloped regions, tourism is often the most important component in regional business development. Cycle tourists appreciate these destinations specifically because of their rural appeal. Around 75% of routes pass through rural regions, linking these together. Tourist service providers from the accommodation, gastronomy and retail segments benefit from the economic factor of cycle tourism in these areas in particular.

3. Cycle tourism is growing in popularity with the demographic shift

In the coming years, the proportion of older travellers is set to increase. Over 50s spend a disproportionate amount of money on travel and health. The share of "Silver Agers" and "Best Agers" in active tourism is high and will in turn lead to a further increase in the cycling holiday segment. The technological evolution of e-bikes has increased and expanded this target group considerably.

4. Cycle tourism enables countless synergies

Bicycles can be used in a versatile and environmentally-friendly manner to experience new things in countless different tourism segments like no other mode of transport can. Cycling holidays are ideal for combining with health-themed holidays, spa breaks, city visits, cultural visits and nature experiences. Conference, meeting and event tourism present potential for the creation of additional offers by using bicycles to explore venues.

5. Cycle tourism contributes to the attainment of climate protection goals

Given that bicycles are a virtually emissions-free mode of transport, cycle tourism projects also contribute to attainment of the climate protection goals of the German federal government.

6. Cycle tourism and environmentally-friendly mobility

If travel to a chosen destination is by environmentally-friendly public modes of transport, cycle tourism can also be marketed as environmentally-friendly and sustainable tourism.

Easy access to high-quality hire bikes can moreover lead holidaymakers to opt to explore cities and regions by bike, thus alleviating the traffic situation and the burden on the climate.

7. Cycle tourism – an international boom factor for Germany

Germany's geographic location at the heart of Europe makes it an excellent destination for international cycle tourism. Germany is a hub for nine of the total of 15 EuroVelo routes, a cycle route network that passes through a number of different European countries. International borders can be crossed along many other cycle routes, too.

Political demands and funding

The ADFC welcomes the statements on cycle tourism made in the **National Cycling Plan 2020** (NRVP 2020), and in particular:

- the **central importance of the German cycling network** in the national and international marketing of cycle tourism;
- the planned **commitment of the federal government to further development of the German cycling network**;
- the need for **uniform signage** for bicycle traffic, based on the uniform national technical regulations of the Road and Transport Research Association (FGSV).

The ADFC calls for compliance with the statements made in the NRVP 2020, along with their realisation and concretisation. The ADFC is of the opinion that the NRVP 2020 should be revised and particularly the points relevant to cycle tourism expressed in more concrete terms.

One key responsibility requiring financial support from the federal government is further development and central marketing of the **German cycling network** (comprising twelve premium routes) with uniform signage and quality characteristics. The quality standards should be oriented to the tried-and-tested criteria of the ADFC Quality Routes. To ensure rapid realisation and development in a style similar to European neighbours such as Denmark, the Netherlands and Switzerland, Germany needs a national coordination office.

Integration of the signage used by the Road and Transport Research Association (FGSV) into the German national road traffic regulations (StVO) should be furthered within the scope of the **standardisation of signage** for bicycle traffic.

Similar to the bicycle highways, responsibility for the **routes in the German cycling network** must also be transferred to the federal government or federal states in the medium to long term.

Cycle tourism must become an **integral component of the (inter)ministerial working groups** on the federal and state levels in order to ensure continuous improvements and to unlock the aforementioned potential.

The general **right of access** must also be standardised across Germany in the future. The ADFC rejects blanket bans that discriminate against cyclists and instead advocates a coexistence in keeping with the times based on mutual recognition, tolerance and consideration.

Cycle tourism has a positive image. The federal government should **recognise the favourable reputation of cycle tourism** and assume a greater role in the realisation of projects involving several federal states. These include quality standards for the twelve premium routes of the German cycling network.

Particularly cycle tourists often choose to travel by train. The **carriage of bicycles** aboard all types of trains is therefore an important component of a sustainable tourism mobility chain. Regional trains – and particularly those covering long distances – are not only an important option for day trippers, but in many regions also allow cycle tourists to reach their chosen destination. A regional mobility chain involving bicycles and public transport for day trip transport must be facilitated, too.

In terms of the **space availability aboard trains**, it must be ensured that pedelecs and other special kinds of bicycles (tandems, hand bikes, etc.) can also be transported. Stations must be adapted so that platforms can easily be accessed by passengers with a bicycle. This particularly applies for the platform height, lift dimensions and ramp incline. Sufficient attractive options for bicycle carriage must be anchored in the public transport laws of the federal states. In principle, **long-distance bus lines** should be able to transport bicycles while ensuring damage is avoided.

With regard to "car-free holidays", attractive offers for **transport via environmentally-friendly mobility chains**, such as train and bicycle as well as bus and bicycle, are necessary. This includes the carriage of bicycles aboard trains and bicycle bus systems in regions. The goal should be a trend reversal in the mode of transport selected to reach destinations (not only for cycling holidays).

For cycle tourism projects involving several federal states, **financing tools must be made available** in all product phases (conception, production, infrastructure, marketing). Within this, private sector service providers should also be involved.

The German federal government and federal states must strive to formulate funding guidelines for cycle tourism projects in such a way that **quality assurance/management** can be ensured by the applicant when funding ends.

Further training opportunities for municipal staff and employees at destination marketing organisations (DMO) is of central importance. The Cycling Academy (funded by the federal government, among others) should increasingly also devote itself to issues relevant to cycle tourism as further training offers for DMOs.

Sound basic research, continuous monitoring and trend studies in cycle tourism must be initiated and supported. The insights gained will help to emphasise the significance of cycle tourism as an important economic factor to political and tourism decision-makers. Only in this way can the economic potential of cycle tourism be unlocked in full in the long term. Specifically, this means the continuous financing of surveys on the bicycle travel market (such as the ADFC Bicycle Travel Analysis) and permanent monitoring of the most important cycle routes through censuses and surveys of cyclists in addition to a revised version of the 2009 Baseline Study on Cycle Tourism.

Appendix: what does the ADFC do for cycle tourism?

Advisory services:

The ADFC advises members and interested parties in the planning and realisation of cycling trips and holidays on the local, regional, national and international levels. The "Discover Germany by Bike" and "Radurlaub" (for organised cycling holidays) brochures are continuously being developed further. The ADFC moreover makes digital cycle routes available in its tour portal. And ADFC maps from the BVA Bielefelder Verlag publishing house are created in cooperation with experienced ADFC scouts and provide good orientation locally.

Motivation to cycle during leisure time:

With its training courses to become a certified ADFC Tour Guide, the ADFC helps to ensure that guided cycle rides are organised by responsible and qualified guides.

Bett+Bike – bicycle-friendly hosts:

With 5,500 hosts, Bett+Bike is the most successful target group-specific accommodation offer for cycle tourists. Around 500 hosts in other European countries are also listed. The ADFC furthers national development and quality assurance for the Bett+Bike quality seal to be able to offer visitors uniform quality standards all across Germany during their cycling holidays. With introduction of the "Bett+Bike Sport" brand, the ADFC has created a target group-specific offer catering specifically to the needs of mountain bikers and racing bike cyclists. The Bett+Bike app, database and according overview map support cycle tourists in their search for bicycle-friendly accommodation.

Quality assurance and development:

The ADFC Quality Route and ADFC Bicycle Travel Region quality seals give cyclists an idea of what they can expect at their destination, how the routes and regions look, and where service is good. Depending on the number of points earned, the ADFC awards long-distance cycle routes up to five stars. It has thus successfully established a uniform standard across Germany. For tourist regions, there is the ADFC Bicycle Travel Region quality seal. Here, the focus is on regional cyclists – so cycle tourists with a fixed base, who explore the local area during day trips and return to the same hotel after every tour.

Tourism expert committees:

Through its involvement in tourism committees of national relevance (BMWi tourism committee, expert groups of the German Tourism Association DTV, marketing committee of the German National Tourist Board DZT, membership of the Kuratorium Sport und Natur e. V. outdoor recreation interest group), the ADFC advocates cycle tourism positions. Internationally, the ADFC is well connected through its membership and involvement in the committees of the European Cyclists' Federation (ECF). The ADFC moreover works to develop cycle tourism further in collaboration with its expert committee for cycle tourism.

Cooperations:

Thanks to cross-sector cooperations – with health insurance companies, the bicycle industry, publishing houses, food retailers, etc. – the ADFC helps to encourage more people to cycle and to engage in cycle tourism.

National marketing:

Cycling holidays do not stop at national borders. The ADFC supports national cycle tourism activities through its national activities and the close cooperation with the ECF in the national and international development and marketing of cycle tourism, among others at international conferences. The ADFC quality label is highly regarded internationally. The Bett+Bike label has since also been introduced in Austria, Belgium, Denmark and Luxembourg. There are now not only ADFC Quality Routes in Germany but in a total of seven other countries, too.

Analyses and trends:

The annual ADFC Bicycle Travel Analysis on the behaviour of cycle tourists is unique the world over, and supplies route operators and cycle tourism destinations with important information on cycle tourism offers, demand and trends. It provides the ADFC with an important basis for recognising trends and determining services and products for cycle tourists.

Figures – data – facts in cycle tourism

- Cycling has been a popular activity among holidaymakers for many years now. 54% of Germans (almost 29.5 million) have already been on a cycle ride during a holiday [cf. Trendscope, 2013].
- 56% Germans have already been on a holiday whose main aim was to cycle [cf. Trendscope, 2013].
- The impact of cycling day trippers' spending should not be underestimated. In 2010, 53% of Germans (almost 38 million) completed a cycle ride lasting at least two hours outside of their local area. This group contributes to the good three quarters of value added derived from cycle tourism [cf. Trendscope, 2010].
- Cycle tourism makes a substantial contribution to tourism within Germany: 82% of cycling holidays took place in Germany [cf. 2016 ADFC Bicycle Travel Analysis]. If all holidays taken by Germans are considered, just 24% of these are in Germany [cf. Foundation for Future Studies, 2016].
- With 19%, cycling holidays top the list of sporting activities undertaken by foreign visitors, ahead of swimming and hiking [cf. German National Tourist Board / Europäische Reiseversicherung AG, 2012].
- Cycle tourism has since become a considerable economic factor: it bolsters medium-sized businesses active in the gastronomy, accommodation and bicycle retail and hire segments as well as (cycling) tour operators. What's more, in 2009 the baseline study conducted by the German Tourism Association (DTV) estimated that investments in bicycle tourism totalled €5.3 billion, which were put towards development of the route infrastructure for example [cf. DTV, 2009].
- 72.6% of German holidaymakers currently travel to holiday destinations within Germany by car [cf. 2016 FUR Travel Analysis].

Sources:

GERMAN NATIONAL CYCLISTS' ASSOCIATION. (ADFC): 2016 ADFC Bicycle Travel Analysis. Berlin 2016.

FOUNDATION FOR FUTURE STUDIES: 2016 Tourism Analysis.

GERMAN FEDERAL MINISTRY OF TRANSPORT AND DIGITAL INFRASTRUCTURE (BMVI): National Cycling Plan 2020 – Joining Forces To Evolve Cycling. Berlin 2012.

GERMAN NATIONAL TOURISM BOARD (DZT) / EUROPÄISCHE REISEVERSICHERUNG AG: 2012 Quality Monitor. Frankfurt am Main 2012.

GERMAN TOURISM ASSOCIATION (DTV): 2009 Baseline Study on Cycle Tourism. Bonn 2009.

FORSCHUNGSGESELLSCHAFT URLAUB UND REISEN E. V. (FUR) 2016 Travel Analysis. Kiel 2016

TRENDSCOPE: Bike Travel in Germany 2013. Cologne 2013.

[1] Basis for these values: 70.55 million inhabitants in Germany aged 14+, as at December 2014. www.statista.com .