

# 2019 Cycling Monitor Germany

## Selected results

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Gefördert durch:



Bundesministerium  
für Verkehr und  
digitale Infrastruktur

aufgrund eines Beschlusses  
des Deutschen Bundestages

**sinus**  MARKT- UND  
SOZIAL-  
FORSCHUNG

Partner von INTEGRAL Wien

# Key findings

## Availability and use of means of transport

- 76 percent of German households have at least one bicycle (without electrical assistance) and 14 percent have a pedelec.
- 44 percent of the persons surveyed regularly – i. e. daily or several times a week – use the bicycle or pedelec as means of transport and/or during leisure time.
  - The youngest age group (14-19 years) most frequently uses the bicycle, followed by the group of 20-29 year-olds; with increasing age, the usage decreases gradually.
- The trend in terms of bicycle use is positive. In comparison with 2017, regular use of the bicycle has increased by 3 percentage points and by 6 percentage points when compared to 2015.
- The popularity of bicycles has also continued to increase from year to year. .
  - In 2019, 65 percent stated that they enjoyed or enjoyed very much using the bicycle as a means of transport. In comparison with 2017, this is an increase of 1 percentage point, and of 10 percentage points when compared to 2015. Riding the bicycle as a leisure activity is even more popular. 70 percent of the persons surveyed stated that they enjoyed using the bicycle (very much). (2017: +7 pp, 2015: +11 pp)
  - The car has lost some popularity and, with 71 percent, is yet only slightly ahead of the bicycle as a leisure time activity. (2017: -4 pp, 2015: -8 pp)
- In the future, 41 percent of the persons surveyed intend to use the bicycle more often.
  - Among the younger ones (14-19 years), the intention is particularly strong with 63 percent.

# Key findings

## Transport policy, mutual respect, feeling of security and wearing of helmets

- The most urgent demands on politicians with regard to bicycle traffic are:
  - Build more cycle paths (60 percent)
  - Better separation of cyclists from car drivers (53 percent) and pedestrians (45 percent)
  - Establish more protective and mandatory cycle lanes (44 percent)
  - Provide safe parking facilities (44 percent)
  - Increase number of cycle-only roads (43 percent)
- About half of the persons surveyed (49 percent) stated that they enjoyed cycling in their community.
- The feeling of safety while cycling is increasing: 56 percent of cyclists state that they feel very or rather safe (2017: 53 percent). Accordingly, 44 percent feel less safe on their bikes.
- The number of cyclists who wear a helmet has also increased from year to year – 38 percent wear headgear always or most of the time; that is 8 percentage points more than 2017.
  - The youngest surveyed age group between 14 and 19 years wears a helmet the least (27 percent), the group of 30 to 39 year-olds most frequently wears one (46 percent).

## Key findings

### Pedelecs, cargo cycles, bike sharing and personal light electric vehicles

- 24 percent of the persons surveyed have already ridden a pedelec.
- 54 percent are familiar with cargo bikes, but only 2 percent of those surveyed use one.
- 10 percent of those surveyed can imagine buying one.
- 69 percent of those surveyed have heard of bike sharing (public rental bike systems) and 17 percent have used them before.
- 13 percent intend to use e-scooters (personal electric light vehicles) more frequently in the future.
- 2 percent are planning on buying a personal light electric vehicle within the next 12 months, and 12 percent is considering maybe buying one.

# Key findings

## Reasons to use the bicycle and commuter potentials of cycle superhighways

- Bicycles are most frequently used for small errands or grocery shopping (66 percent at least a few times a month).
- Just under one third of those surveyed who are working or undergoing training stated that they used the bicycle at least a few times a week on the way to their place of work or education.
  - The bicycle is more often used for commuting among young people and in urban areas.
- Those who do not use their bicycle to commute most often say that the reason is that the distance is too long (42 percent) or they are exposed to wind and weather (41 percent) 19 percent do not cycle to work/study, because it's too dangerous for them.
- The construction of cycle paths is generally viewed very positively. 37 percent of those surveyed who are yet to cycle as a means of transportation say they would use the bicycle if there were express cycle paths on their way to work/education would. 74 percent of those already commuting would use the bicycle more often than before.

## Key findings

### Protected bike lanes and cycle-only roads

- About 40 percent of those surveyed have heard of the concept of "protected bike lanes", but only 7 percent have used a protected bike lane.
- Cycle-only roads are significantly better known (70 percent of the persons surveyed). About one-third has already used a cycle-only road (34 percent).
- Slightly less than half of cyclists who have already used a cycle route prefer this form of cycling compared to other cycle paths(48 percent).

# Key findings

## Cycle tourism and bicycle market

- 44 percent of cyclists have undertaken a bicycle tour of half a day or longer in the last two years.
- 15 percent of those surveyed know the German Cycle Network (D-routes) which comprises about 11,700 km. 8 percent have already used one or more D-routes.
  - The Rhine Route (20 %) and the Elbe Route (17 %) are the ones most frequently used.
  - The majority has used the D-routes during a longer bicycle tour (60 percent).
- In 2019, 31 percent of those surveyed plan to buy a new bicycle within the next 12 months. At 865 euros, the sum that each person is willing to spend is considerably higher than the average value of 2017 (+ € 184).
  - The choice is often made in favour of the pedelec: 42 percent say they want to buy a pedelec. Compared to 2017, this is a significant increase of 27 percentage points.
  - This is followed by the conventional bicycle with 32 percent and the mountain bike with 22 percent. Currently 5 percent of potential buyers are planning to buy a cargo bike.
- Conventional bicycles such as ladies' bicycles or city bikes are still most frequently used by cyclists in Germany (62 percent).
  - Presently, 14 percent of cyclists use a pedelec and 3 percent use cargo bikes.

# Key findings

## Urban vs. rural area

- In urban areas, the bicycle or pedelec is more frequently used than in rural areas (45 percent vs. 33 percent).
- Cargo bikes and bike sharing are more relevant in cities.
  - In urban areas, more people than in the countryside have already heard about rental bikes (+15 PP city vs. countryside). While 62 percent of those surveyed from the city state that they have a rental bike system in their place of residence, this applies to only 10 percent of rural population.
  - Persons surveyed who live in urban areas are more likely to consider buying a cargo cycle than persons who live in rural areas (11 percent vs. 7 percent).
  - Interviewees from urban areas are more likely than those from rural areas to imagine buying a cargo bike. (11 percent urban vs. 7 percent rural)
- In the case of pedelecs, the use, the experience and the interest of the persons surveyed differ only marginally between rural and urban areas.

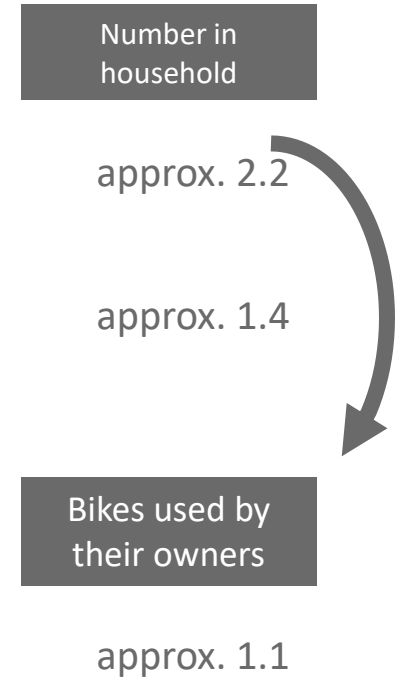
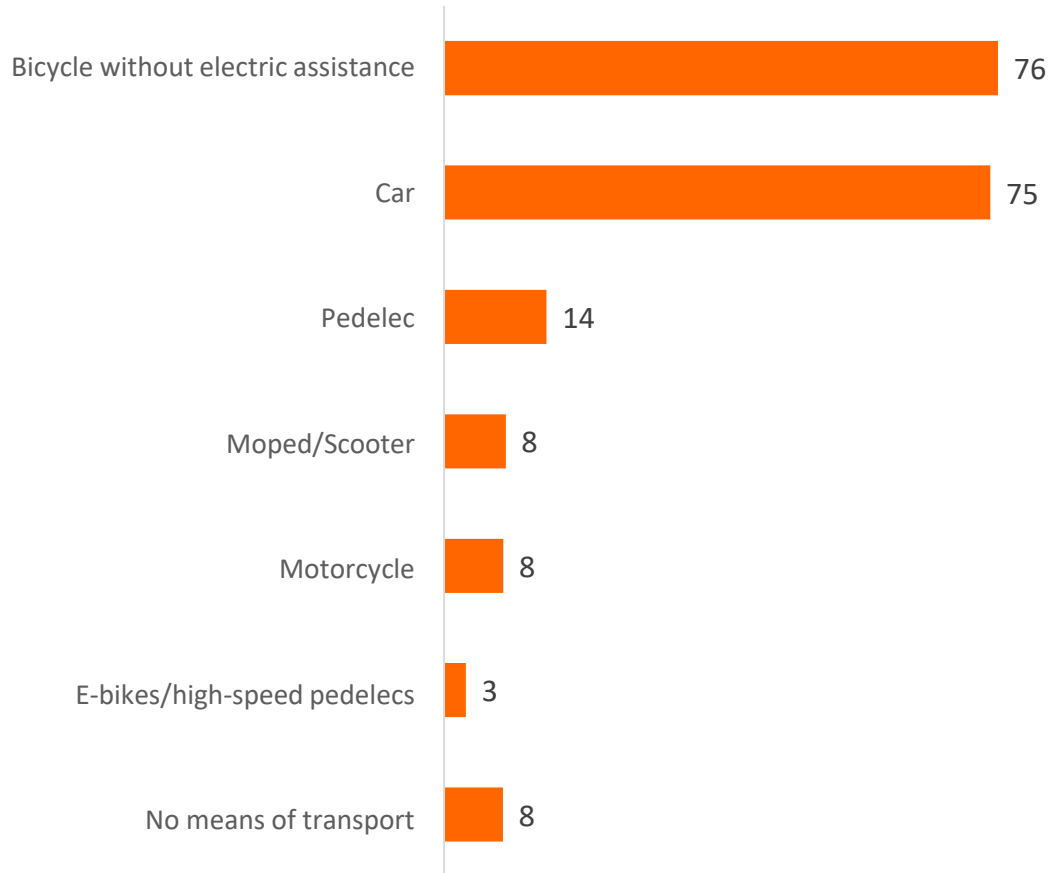


01

# Availability and use of means of transport

# Available means of transport

*“What means of transport can be found in your household?” (more than one answer possible)*



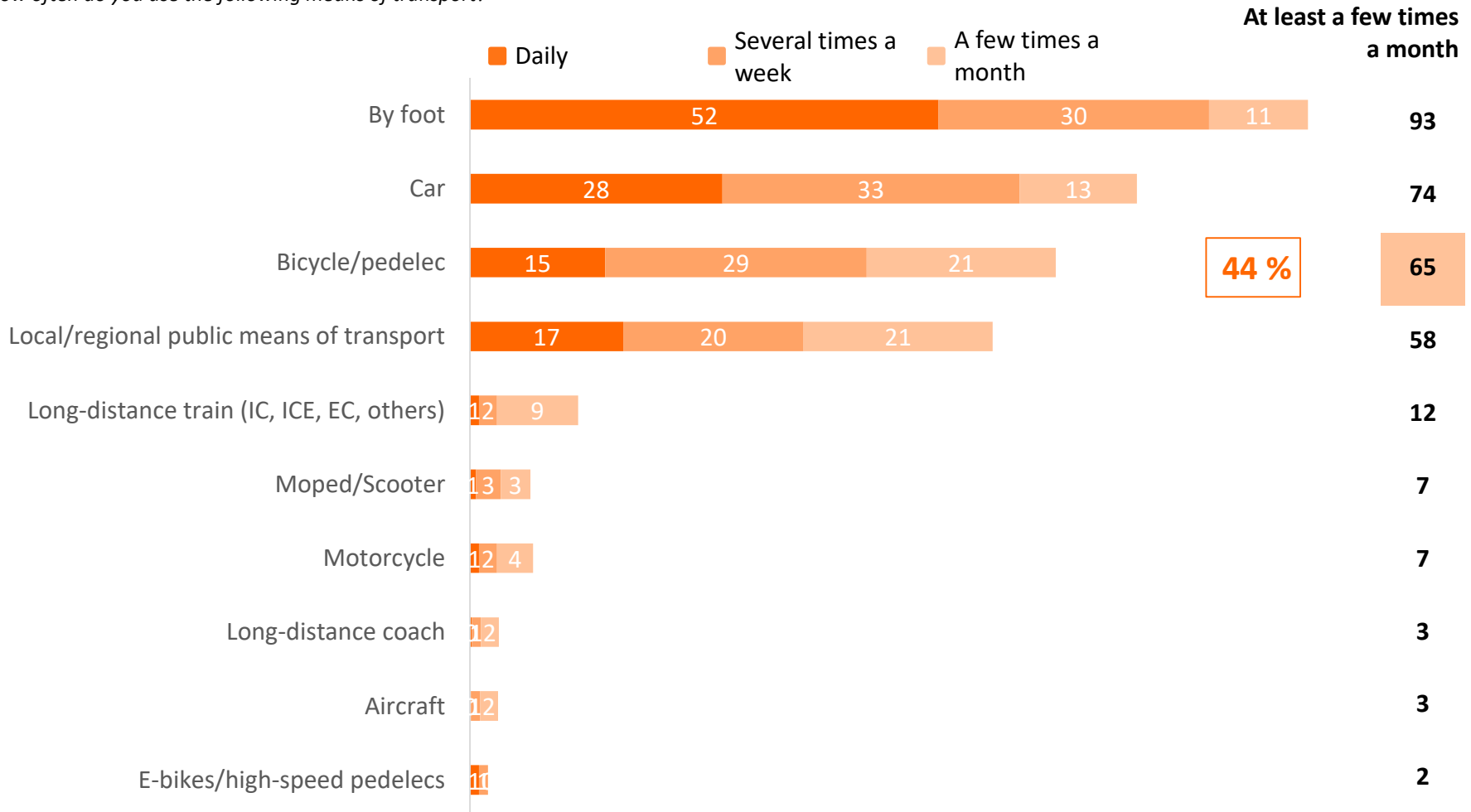
Figures in percent

N = 3,053; all persons surveyed

# Frequency of use of means of transport

## Bicycle compared to other means of transport

“How often do you use the following means of transport?”



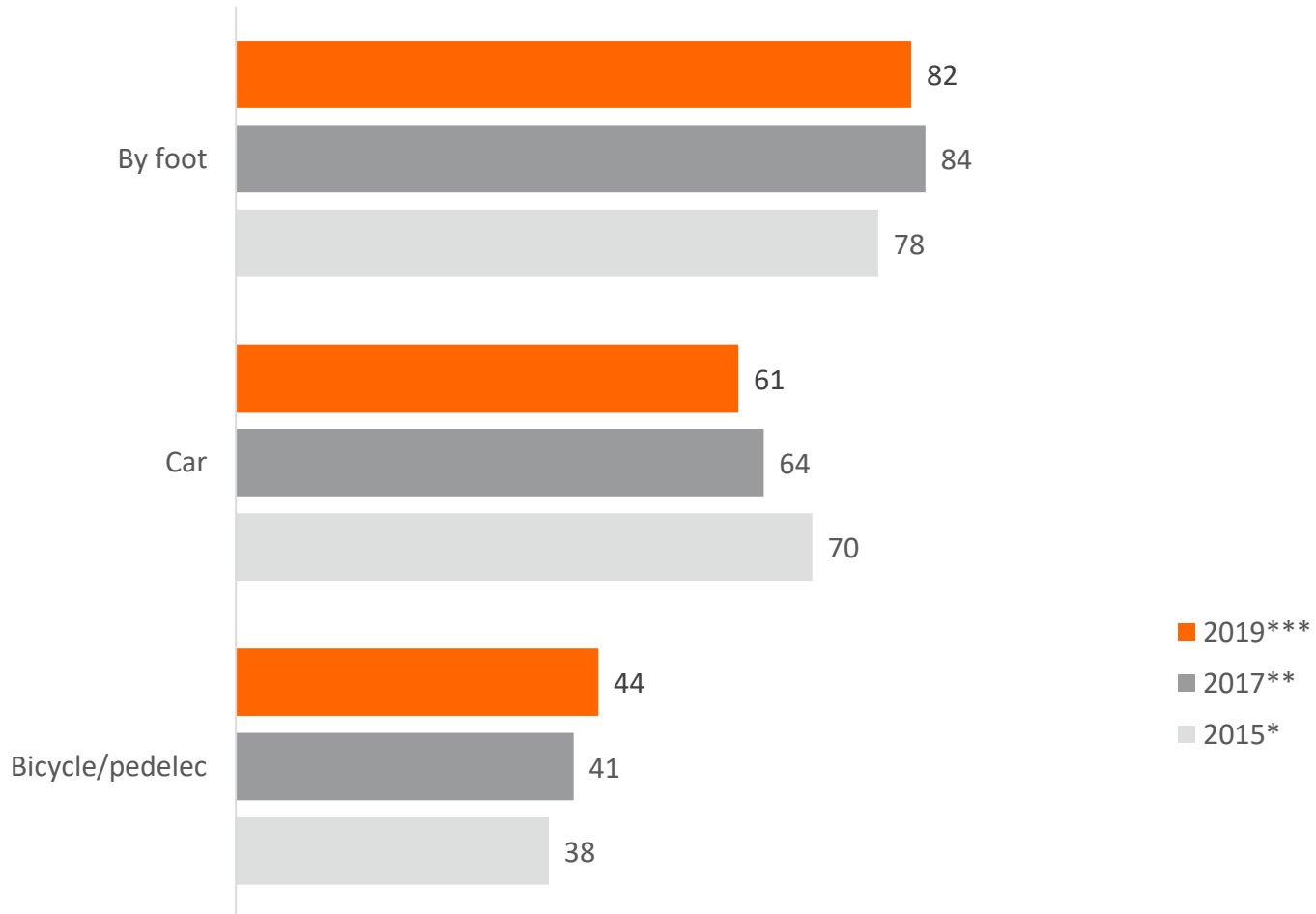
Figures in percent

N = 3,053, all persons surveyed

# Regular use of means of transport

## Time comparison survey 2019 – 2017 – 2015

*“How often do you use the following means of transport?”  
(at least a few times a week)*



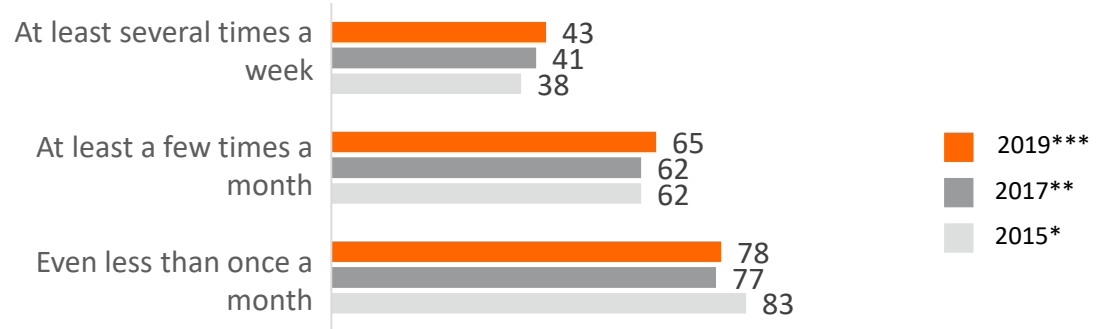
Figures in percent

# Type of bicycle use – means of transport vs. leisure time

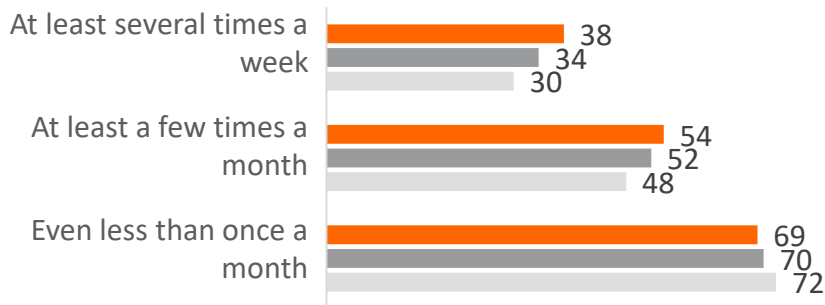
## Time comparison survey 2019 – 2017 – 2015

“How often do you use the following means of transport?”

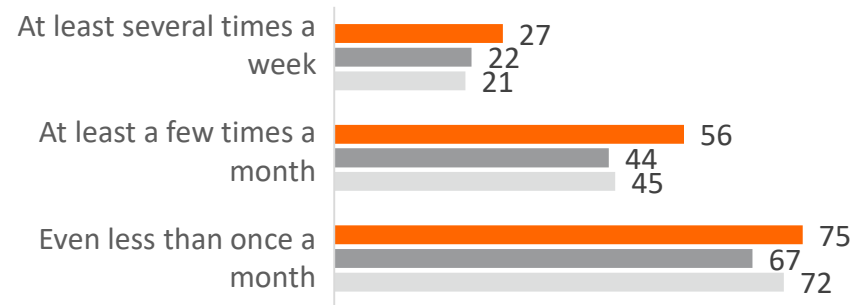
### Bicycle (means of transport/leisure time activity)



### Bicycle just as a means of transport



### Bicycle as a leisure time activity



Figures in percent

\*\*\*N = 3,053 persons

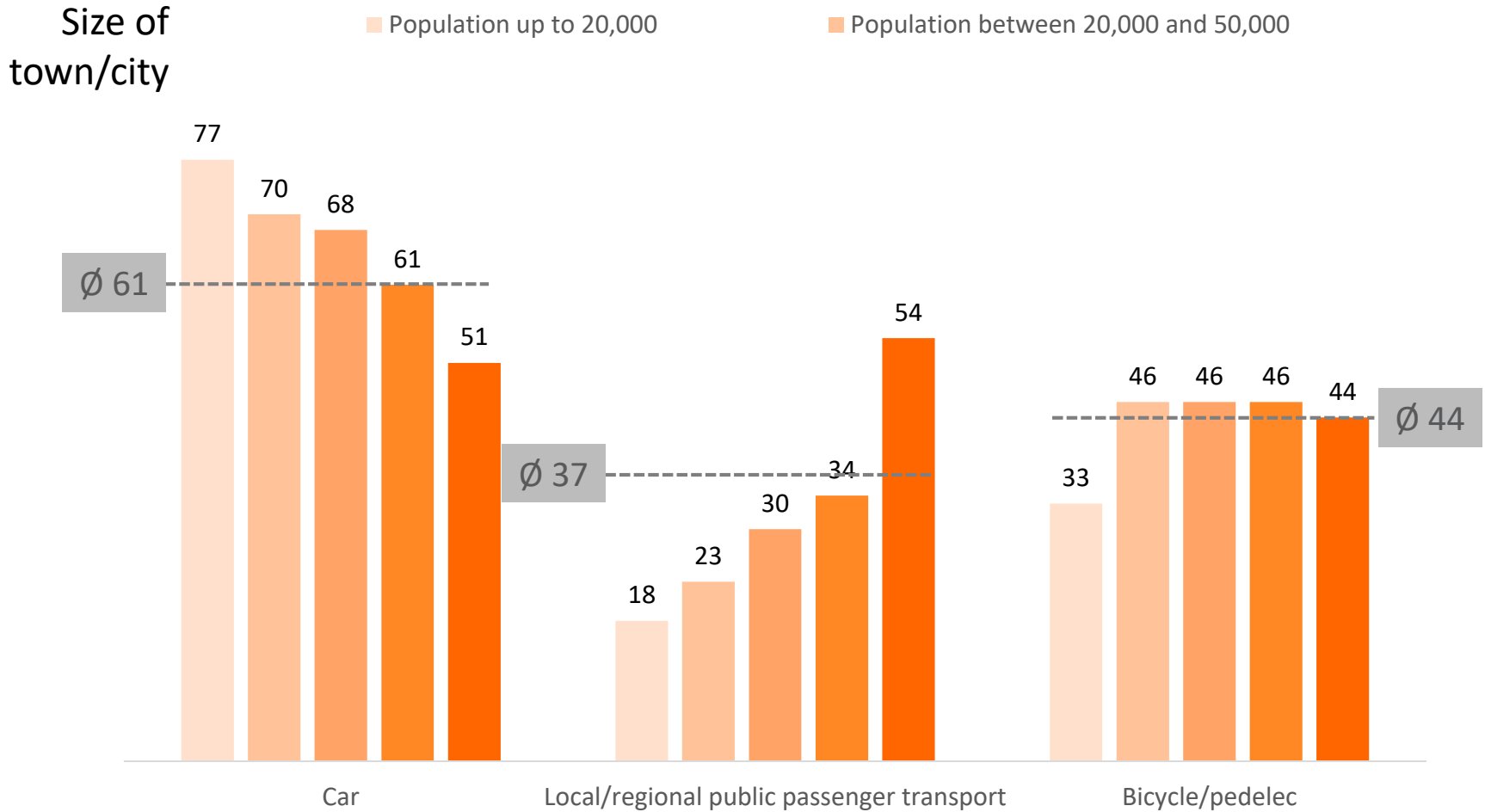
\*\*N = 3,156 persons

\*N = 2,000 persons

# Regular use of means of transport

## Regular users by size of town/city

“How often do you use the following means of transport?” – Daily/Several times a week



Figures in percent

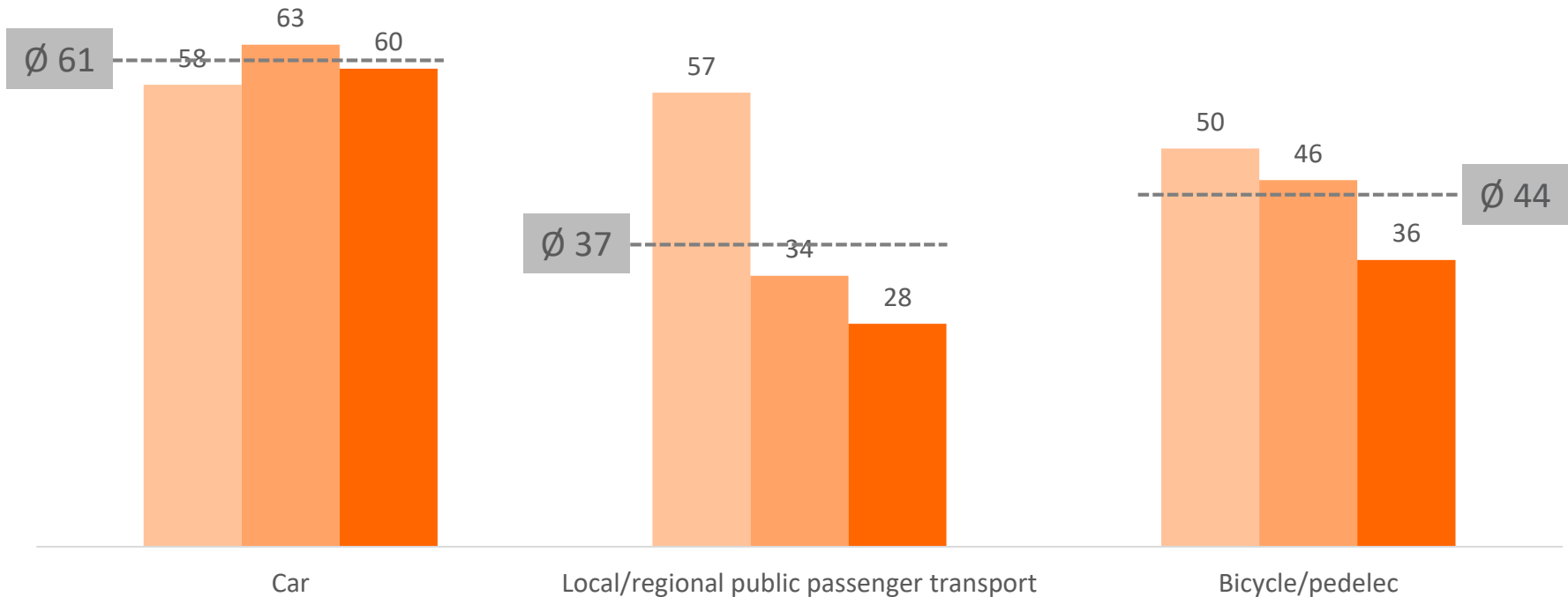
N = 3,053; all persons surveyed

# Regular use of means of transport

## Regular users by age

“How often do use the following means of transport?” – Daily/Several times a week

Age ■ 14-29 years ■ 30-49 years ■ 50-69 years



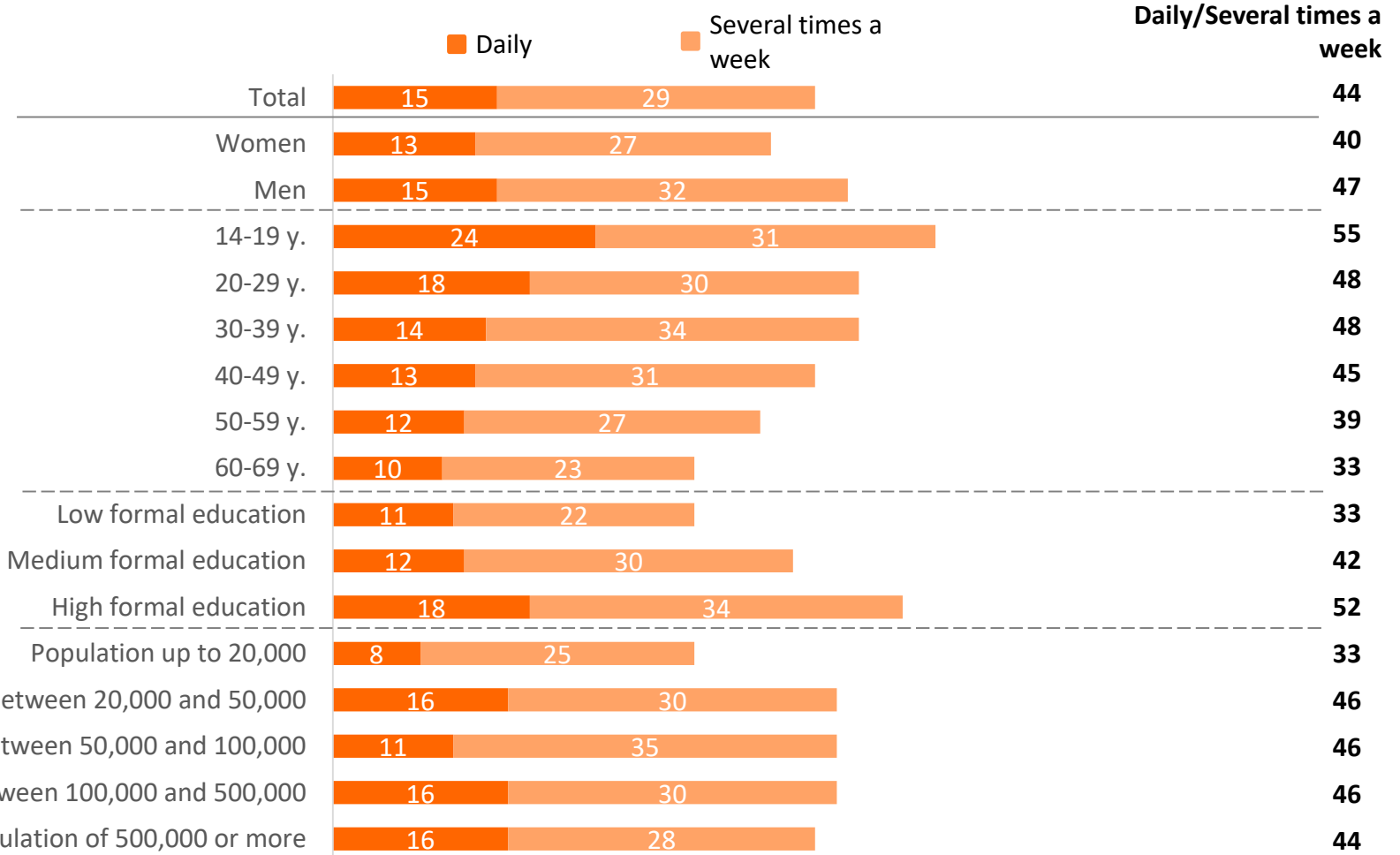
Figures in percent

N = 3,053; all persons surveyed

# Regular use of means of transport

## Bicycle/pedelec

“How often do you move on using the following means of transport?” (bicycle/pedelec)



Figures in percent

N = 3,053; all persons surveyed

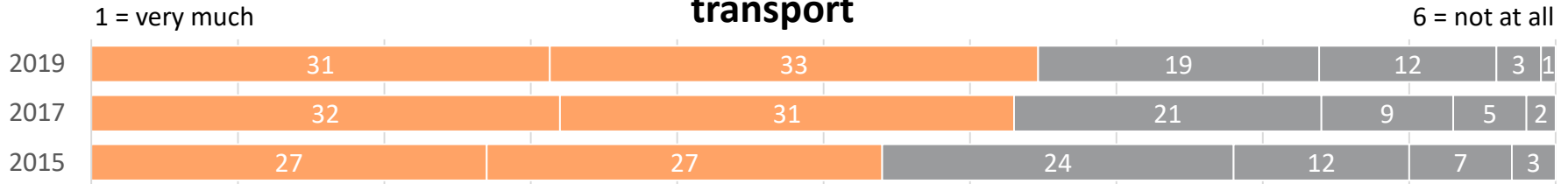


# Popularity of means of transport among users

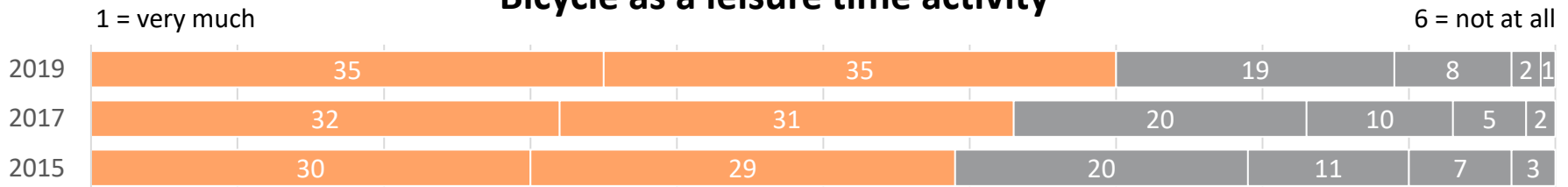
## Time comparison survey 2019 – 2017 – 2015

"How much do you enjoy using ... on a scale from 1=very much to 6=not at all?"

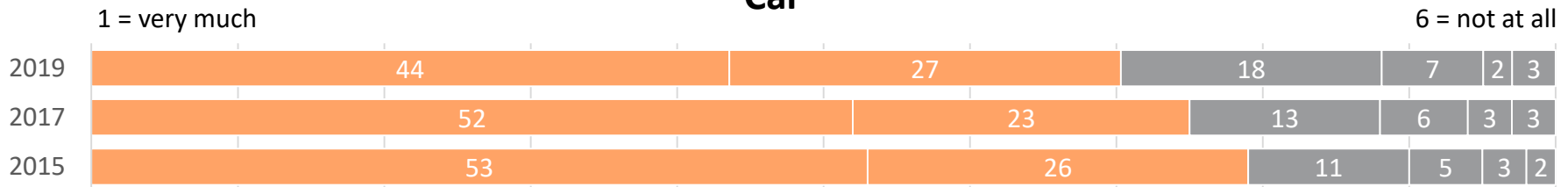
### Bicycle as a means of transport



### Bicycle as a leisure time activity



### Car

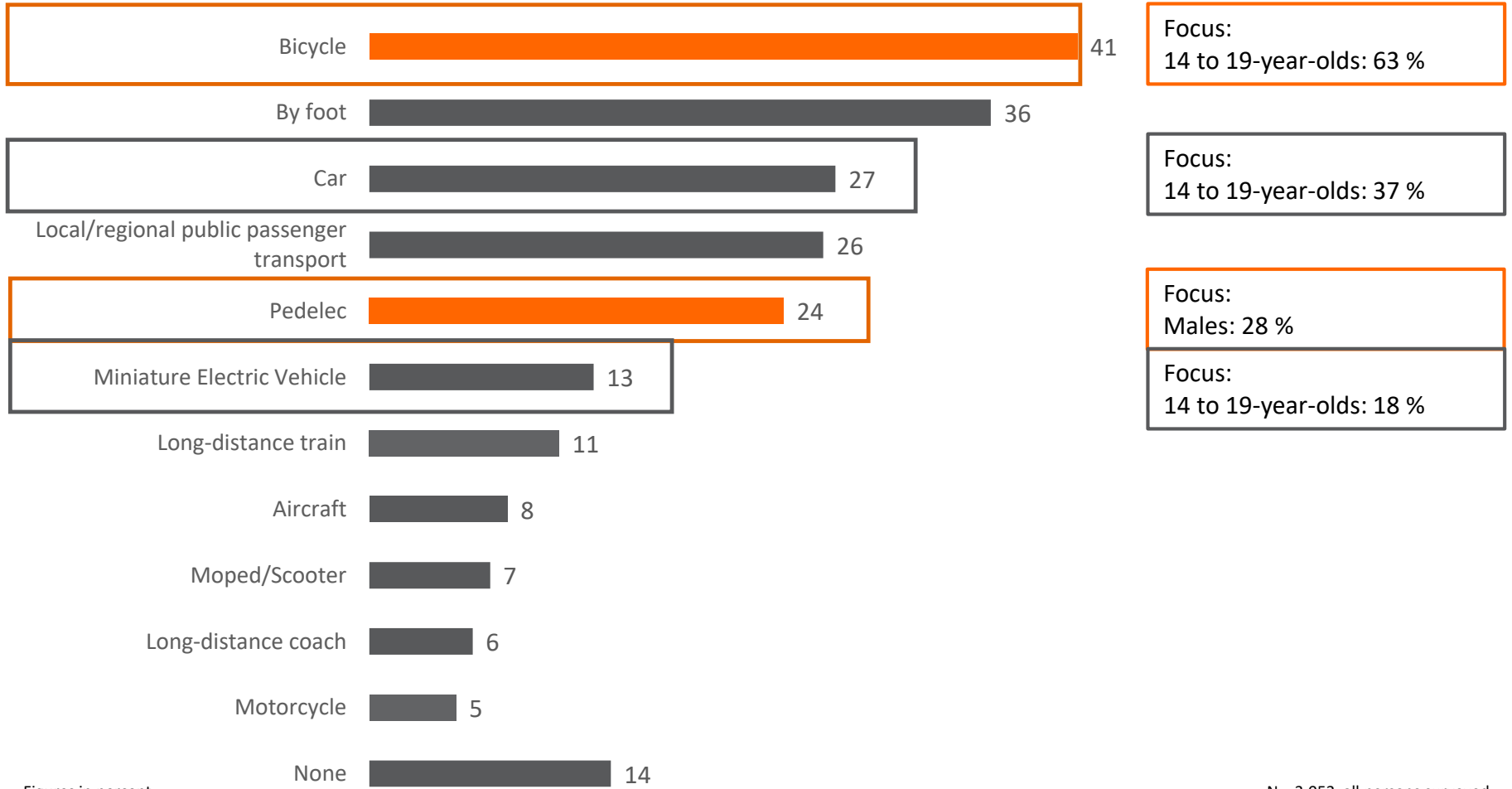


Means of transport (2019 n=2106; 2017 n=2214; 2015 n= 1445)  
 Leisure time activity (2019 n=2272; 2017 n=2124 , 2015 n=1444)  
 Car (2019 n=2547; 2017 n=2885, 2015 n=1850)  
 Basis: use the respective means of transport

Figures in percent

# Greater use of means of transport in the future

"Which of these means of transport would you like to use more frequently in the future?" (more than one answer possible)



Figures in percent

N = 3,053; all persons surveyed

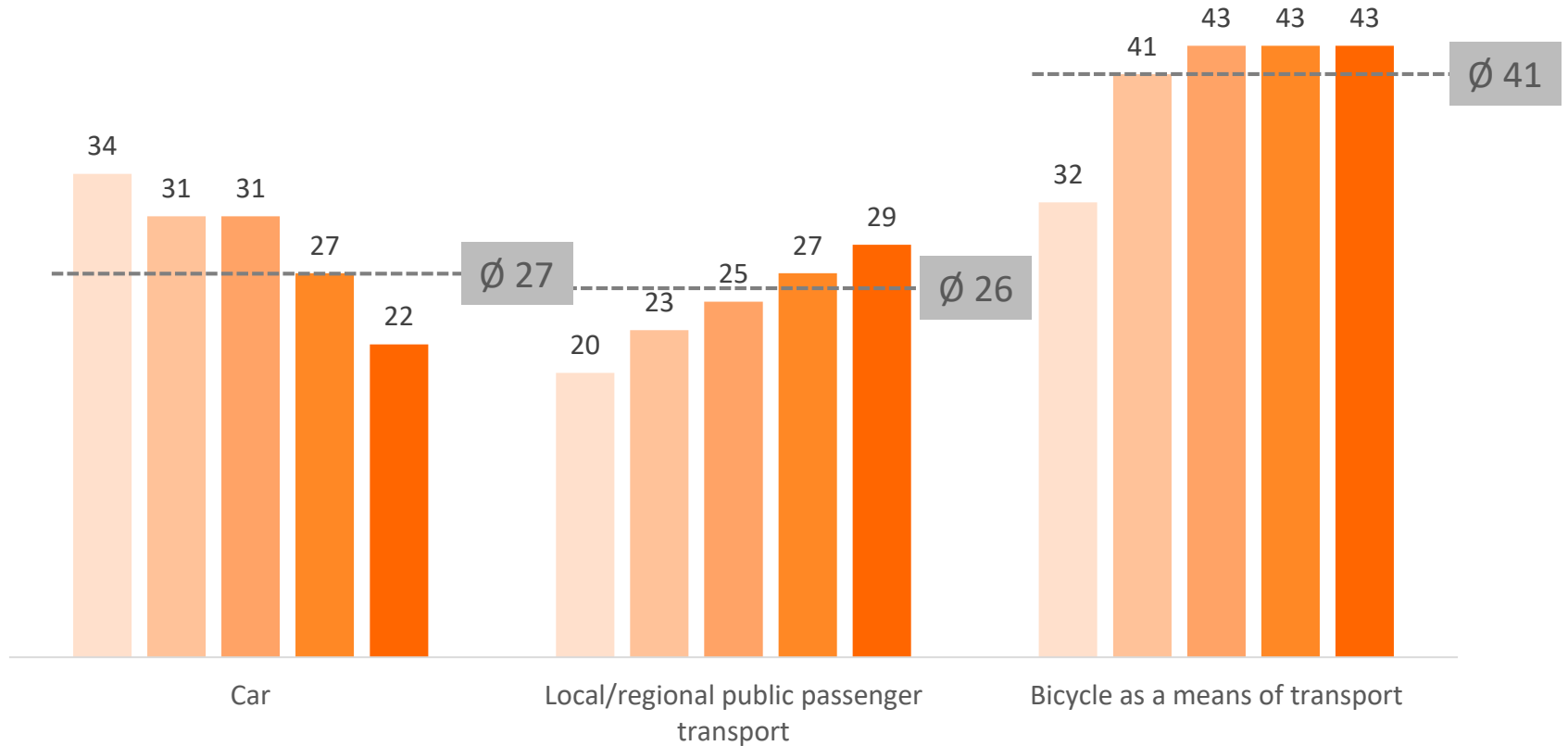
# Greater use of means of transport in the future

## By size of town/city

"Which of these means of transport would you like to use more frequently in the future?" (more than one answer possible)

Size of town/city

■ up to 20,000 
 ■ between 20,000 and 50,000 
 ■ between 50,000 and 100,000 
 ■ between 100,000 and 500,000 
 ■ 500,000 or more



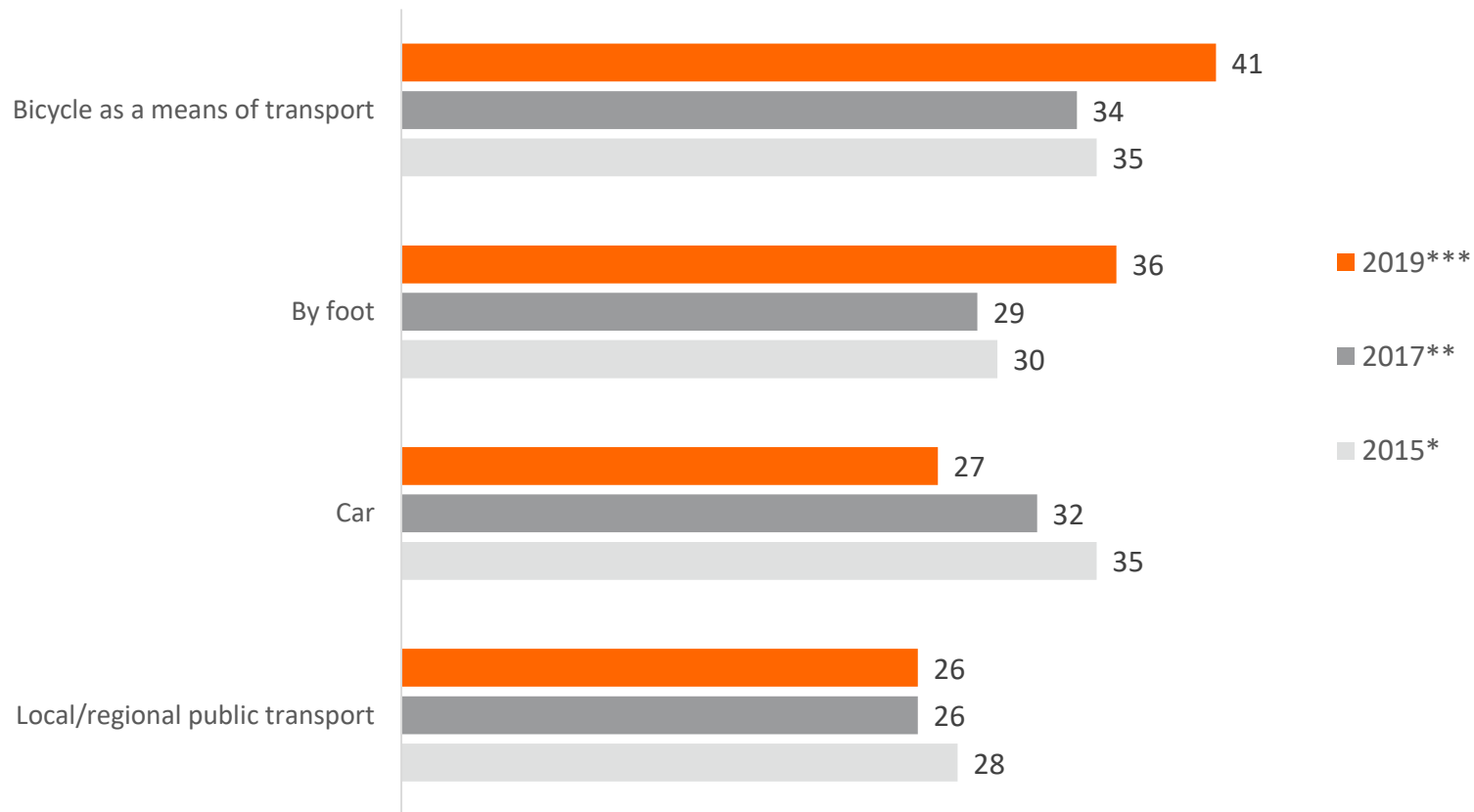
Figures in percent

N = 3,053; all persons surveyed

# Greater use of means of transport in the future

## Time comparison survey 2019 – 2017 – 2015

"Which of these means of transport would you like to use more frequently in the future?" (more than one answer possible)



Figures in percent

\*\*\*N= 3,053 persons

\*\*N= 3,156 persons

\*N= 2,000 persons

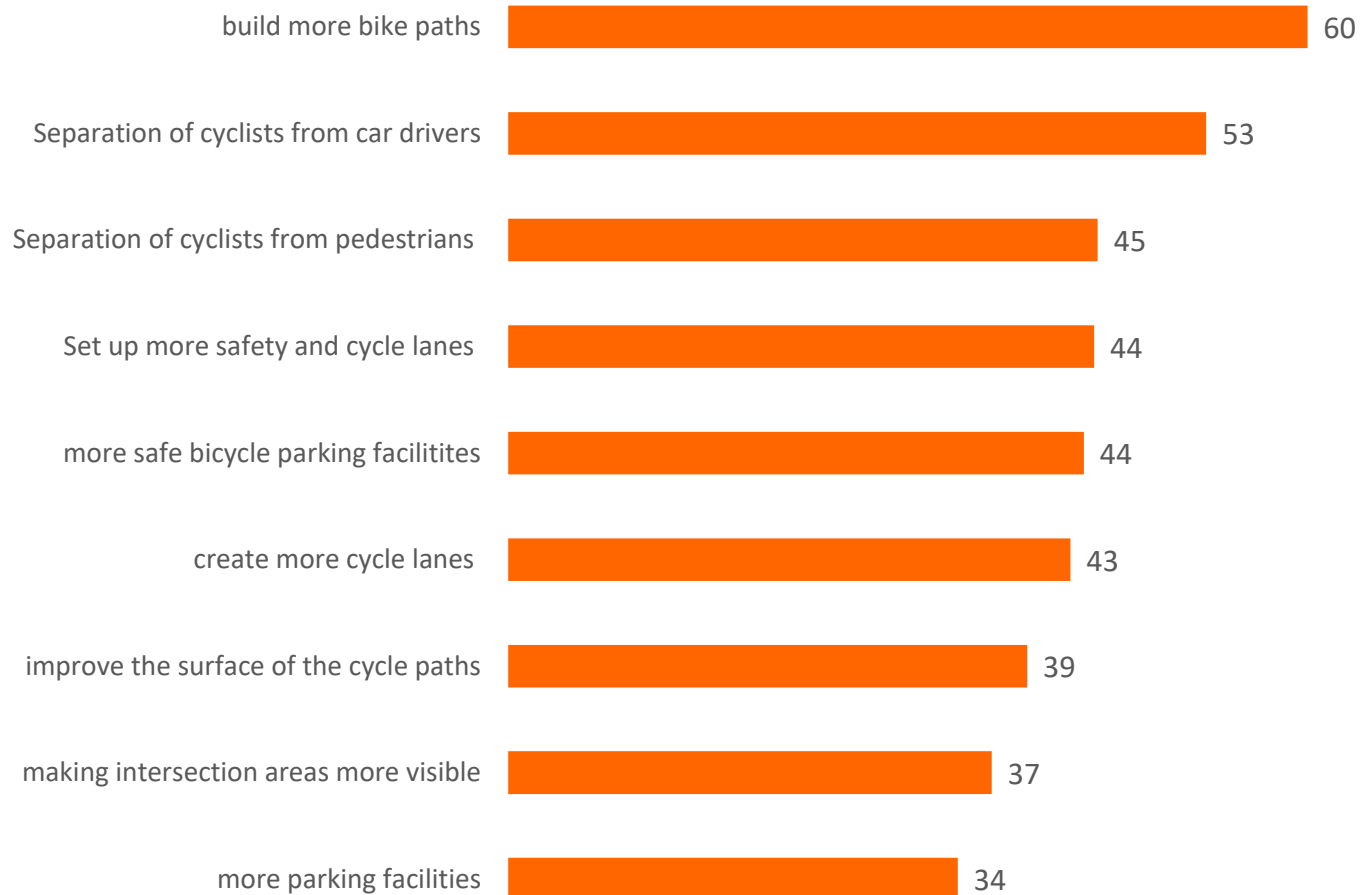
02

Transport policy, mutual respect,  
feeling of security and wearing of  
helmets

# Improvements for cycling (1/2)

## What people want policymakers to do

*"In your opinion, in what areas do you think federal, state and local politicians could do more for cycling?" (more than one answer possible)*



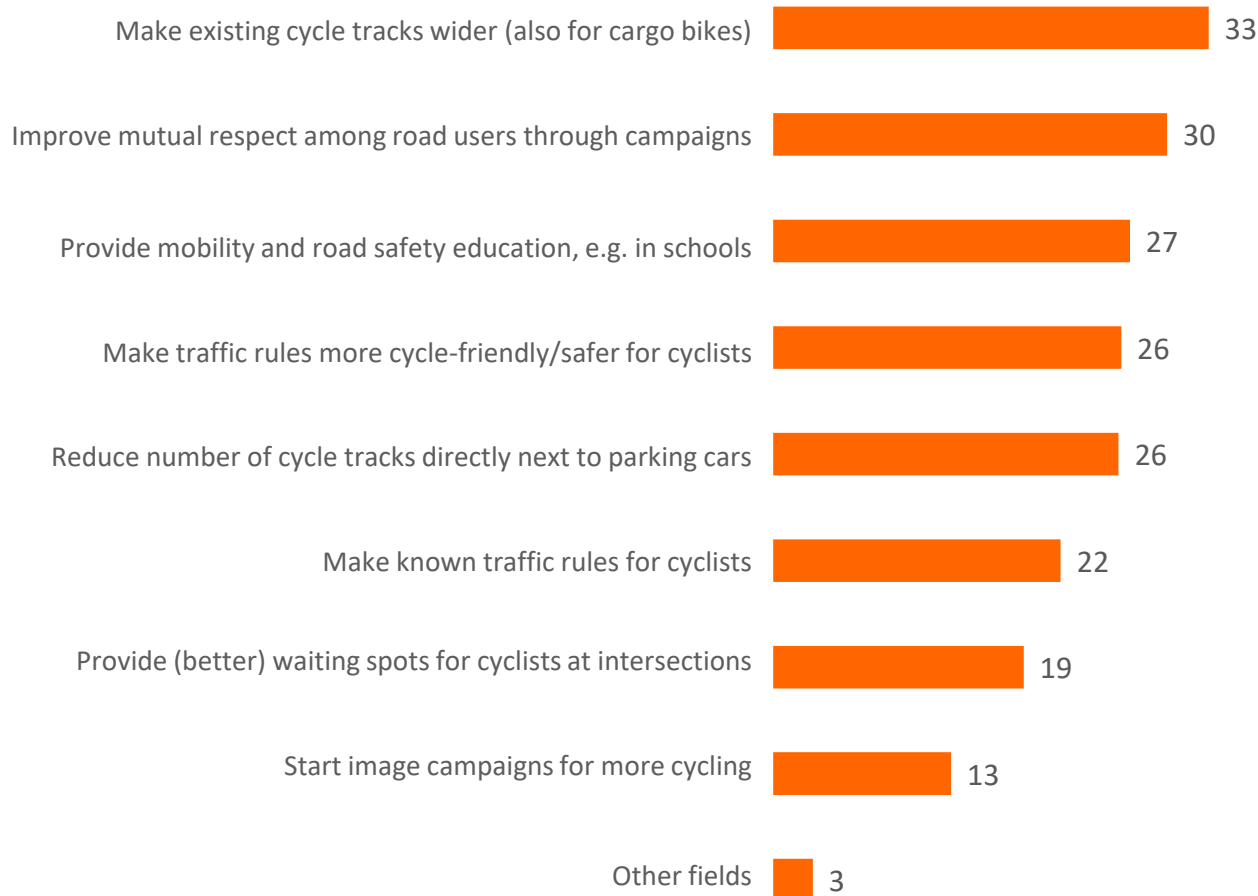
Figures in percent

N = 3,053; all persons surveyed

# Improvements for cycling (2/2)

## What people want policymakers to do

*"In your opinion, in what areas do you think federal, state and local politicians could do more for cycling?" (more than one answer possible)*

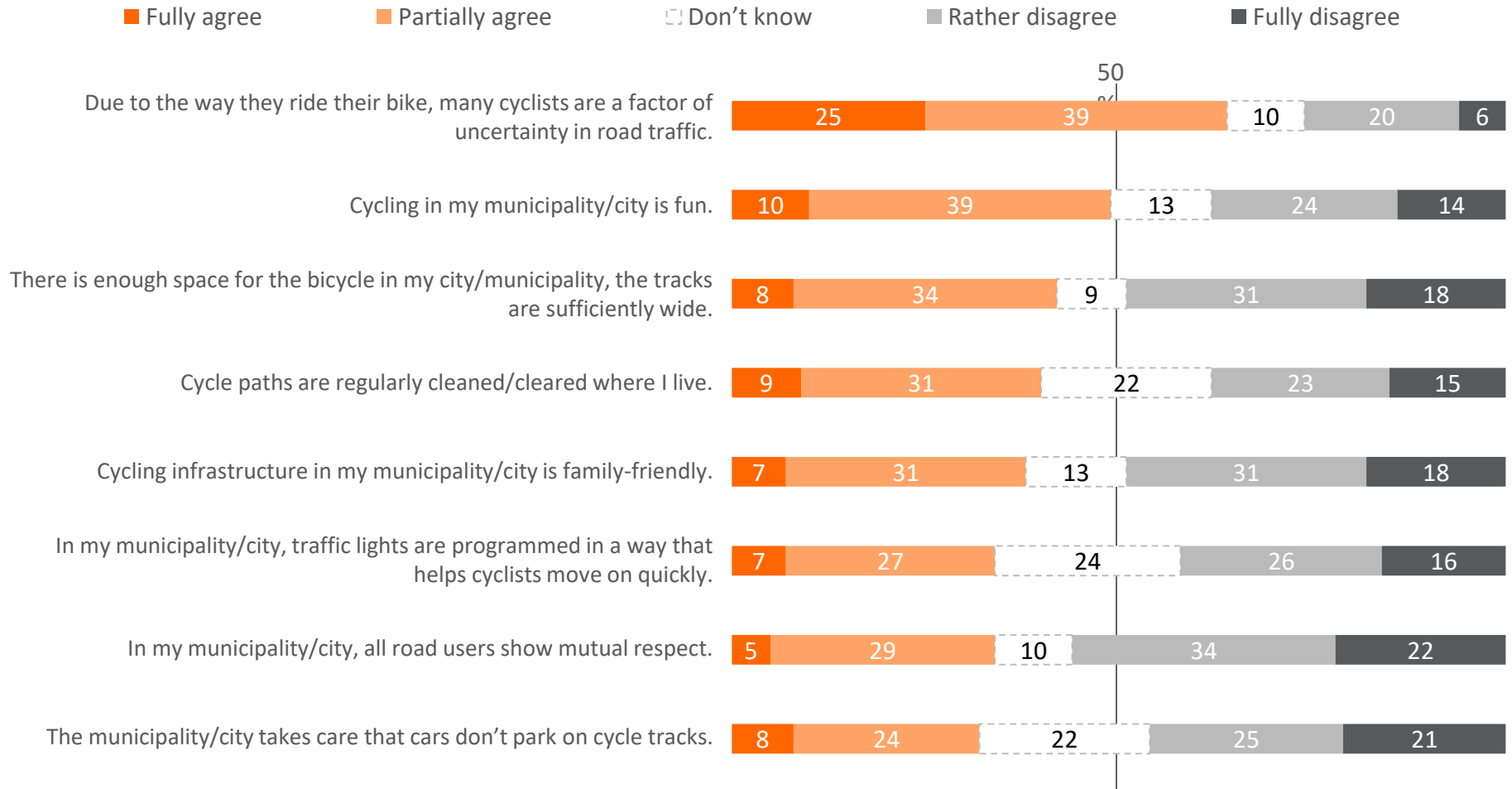


Figures in percent

N = 3,053; all persons surveyed

# Statements regarding cycling in municipalities/cities

“Please state to what extent the following statements are applicable to your municipality/city.”



Figures in percent

N = 3,053; all persons surveyed



# Statements regarding cycling in municipalities/cities

“Please state to what extent the following statements are applicable to your municipality/city.” - **Fully agree/rather agree**



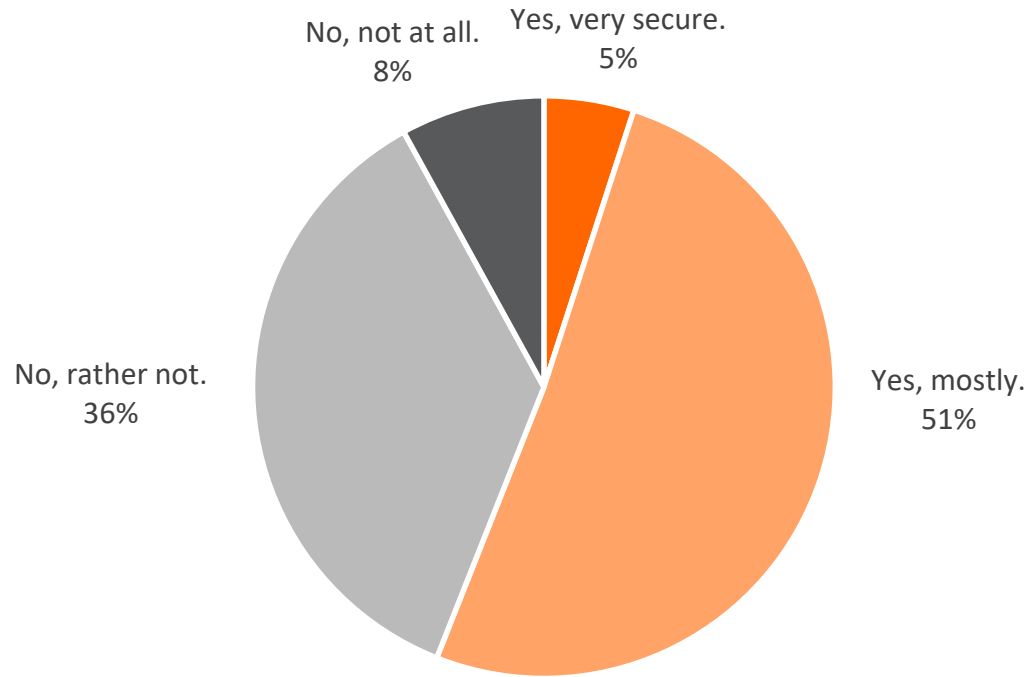
Figures in percent

N = 3,053; all persons surveyed

# Feeling of security when cycling in road traffic

## Subjective feeling of security

*"Do you feel safe when cycling in road traffic?"*

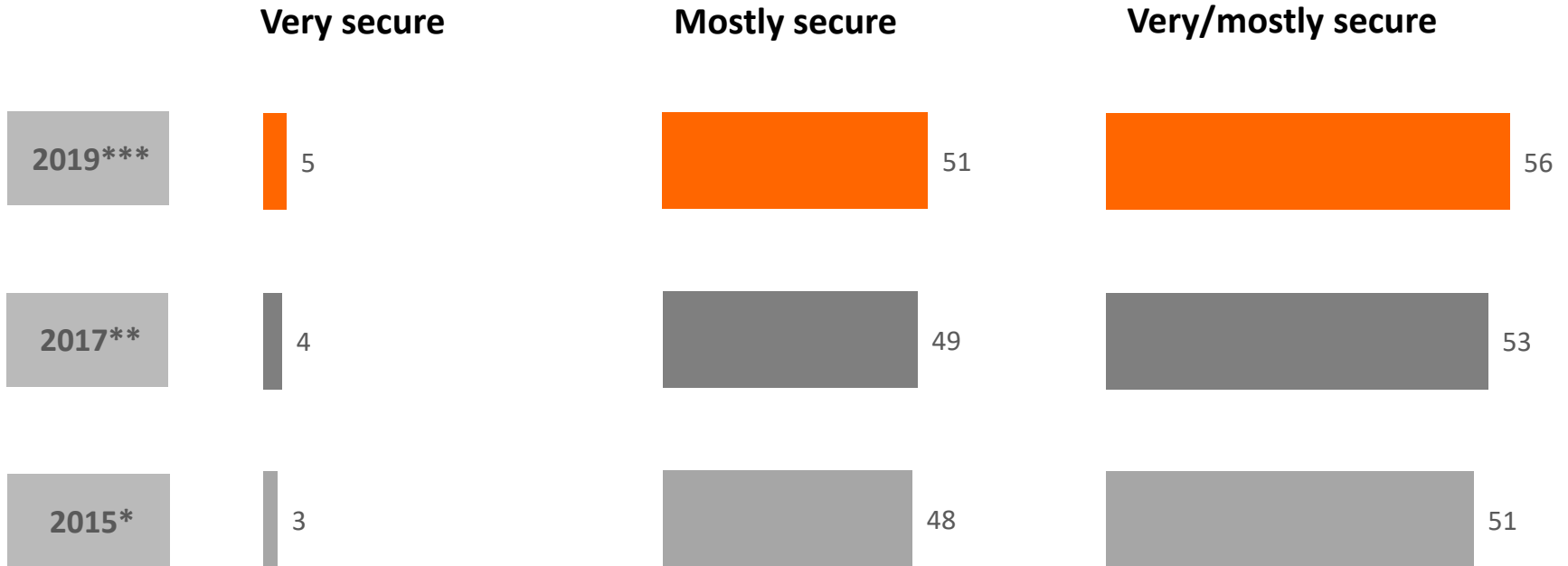


N= 2,376; cyclists

# Feeling of security when cycling in road traffic

## Time comparison survey 2019 – 2017 – 2015

“Do you feel secure when cycling in road traffic?”



Figures in percent

\*\*\*N=2,376 cyclists

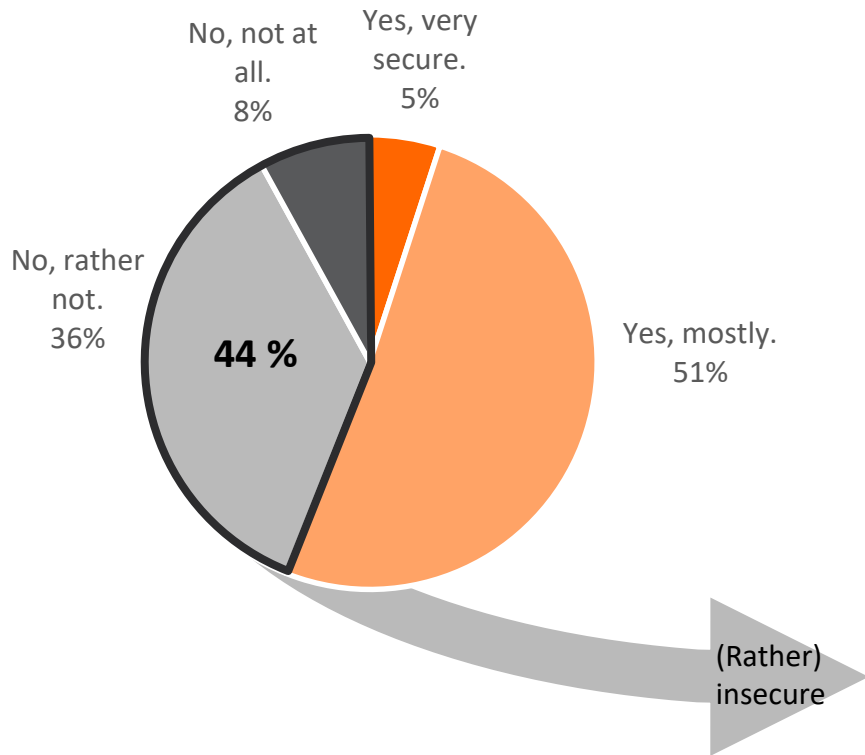
\*\*N= 2,440 cyclists

\*N= 1,644 cyclists

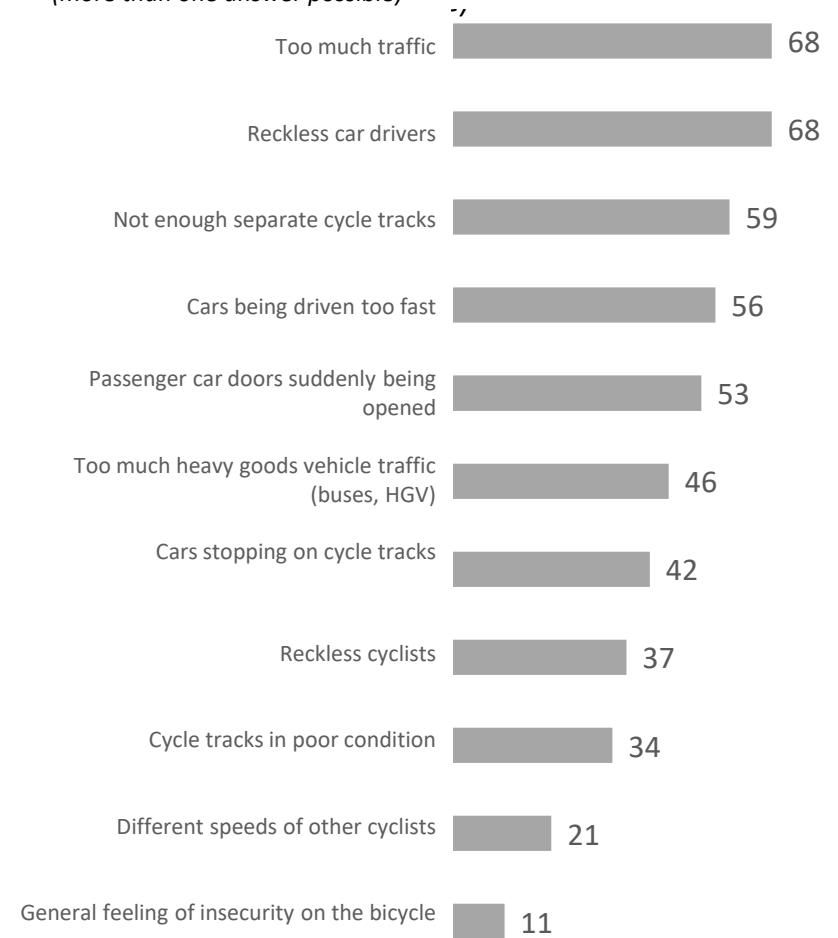
# Reasons for feeling insecure in road traffic

## Subjective feeling of security

“Do you feel secure when cycling in road traffic?”



“Why do you feel (rather) insecure?”  
(more than one answer possible)



Figures in percent

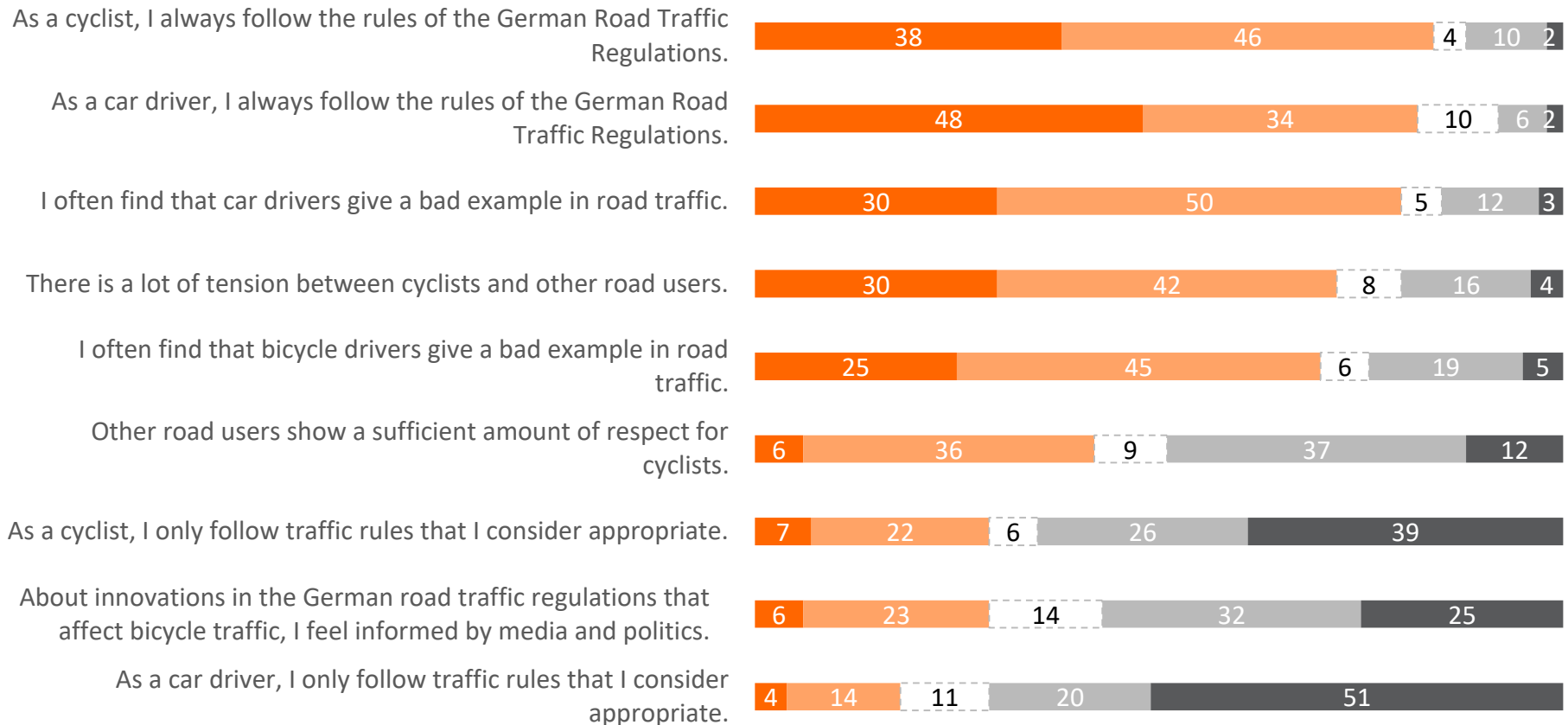
N= 2,376; cyclists

N= 1,035; persons who rather not or not at all feel secure in road traffic

# Statements regarding mutual respect in road traffic

"To what extent do you agree with the following statements regarding mutual respect between road users?"

■ Fully agree    
 ■ Partially agree    
 □ Don't know    
 ■ Rather disagree    
 ■ Fully disagree



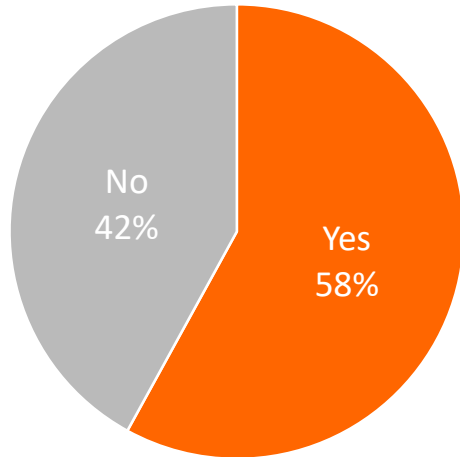
Figures in percent

N = 3,053; all persons surveyed

# Possession and use of cycle helmets

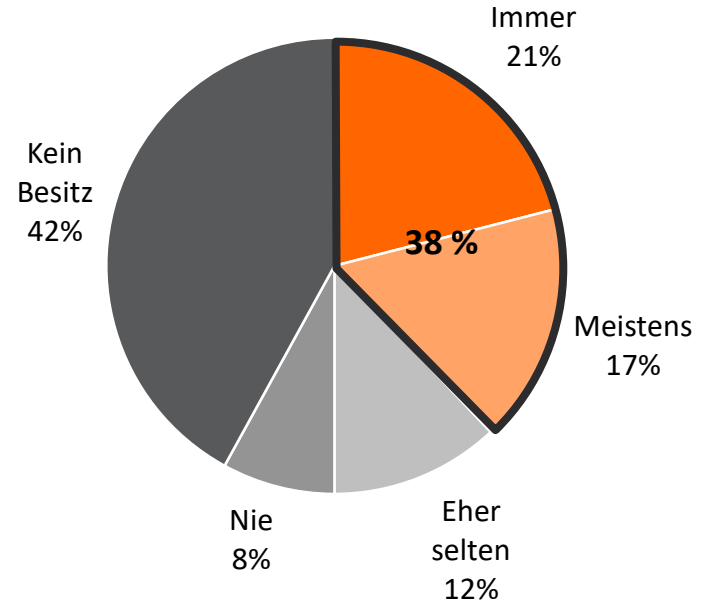
## Possession

*"Do you or does your household possess a cycle helmet?"*



## Use

*"How often do you wear a cycle helmet?"*

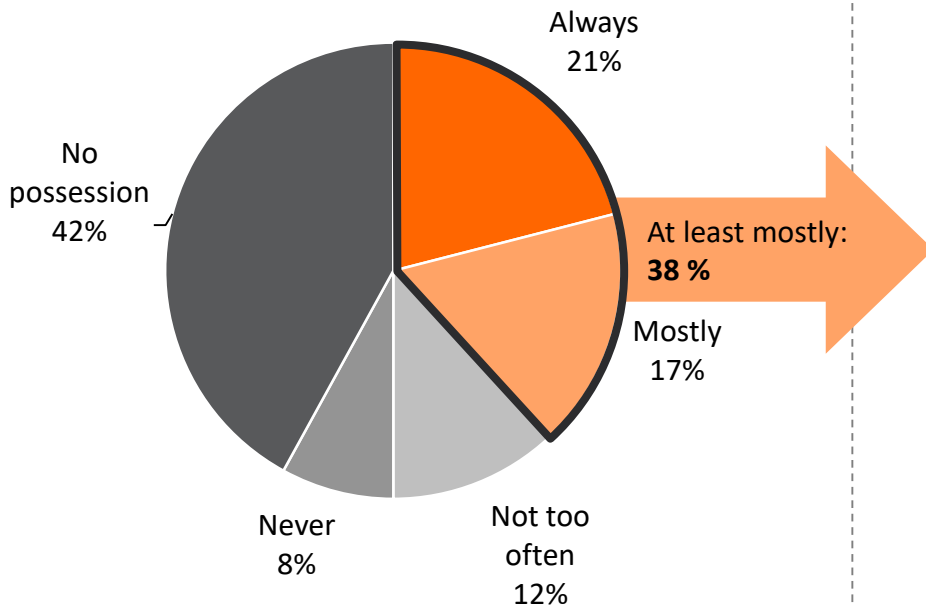


N= 2,376; cyclists

# Possession and use of cycle helmets

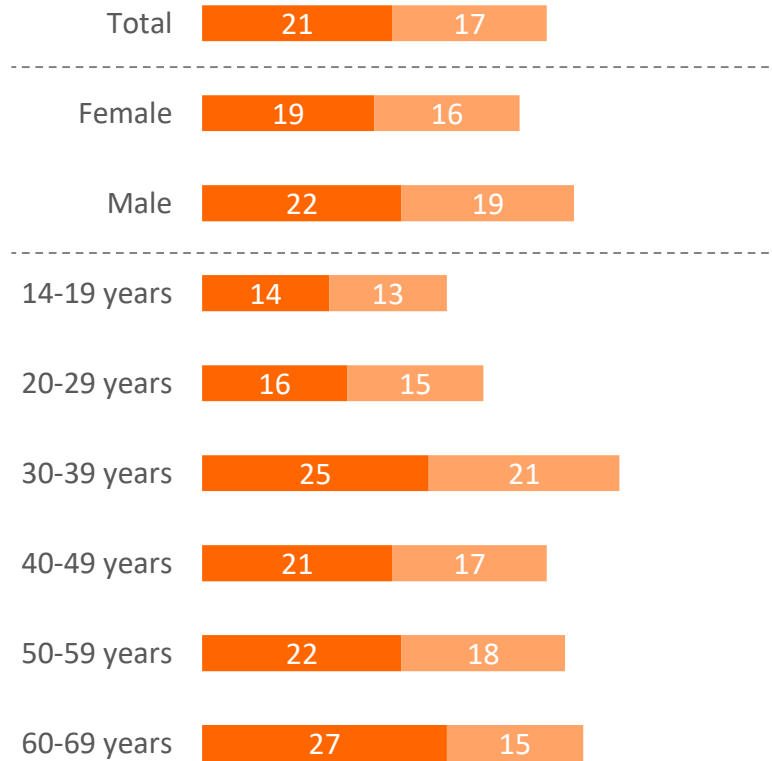
## Possession & use

"How often do you wear a cycle helmet?"



## Separated by age and sex

(always/mostly)

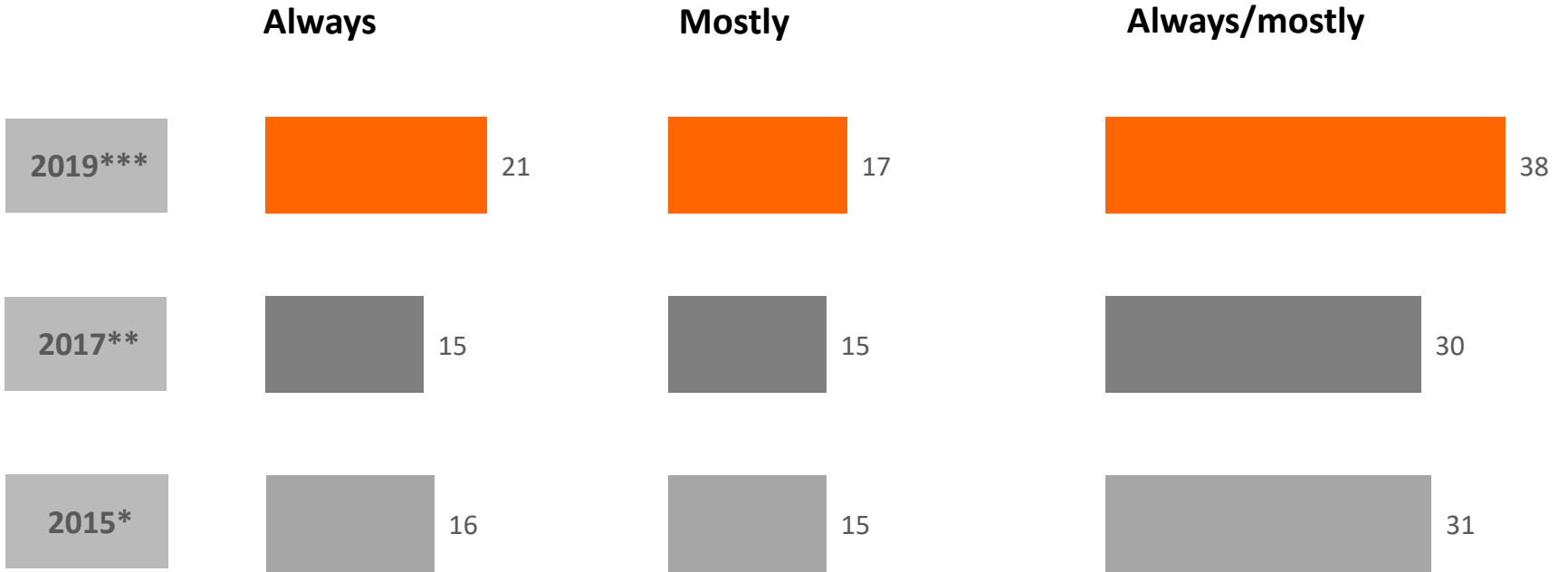


Figures in percent  
N= 2,376; cyclists

# Wearing of helmets

## Time comparison survey 2019 – 2017 – 2015

“Do you wear a cycle helmet?”



Figures in percent

\*\*\*N=2,376 cyclists

\*\*N= 2,440 cyclists

\*N= 1,644 cyclists



03

Innovations:

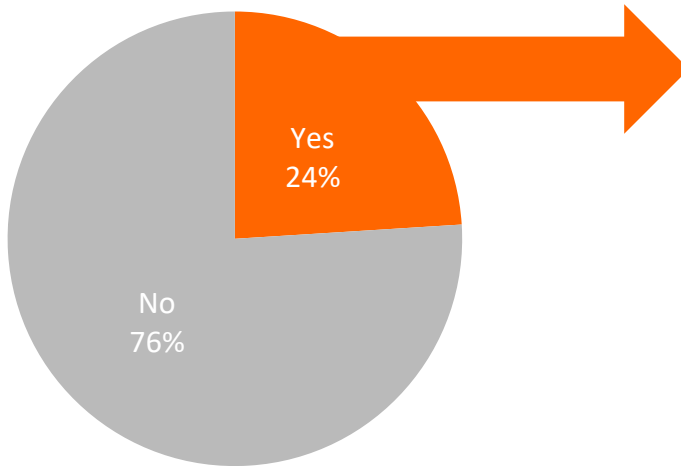
Pedelecs, cargo bikes, bike sharing and micro electric vehicles

# Experience with pedelecs

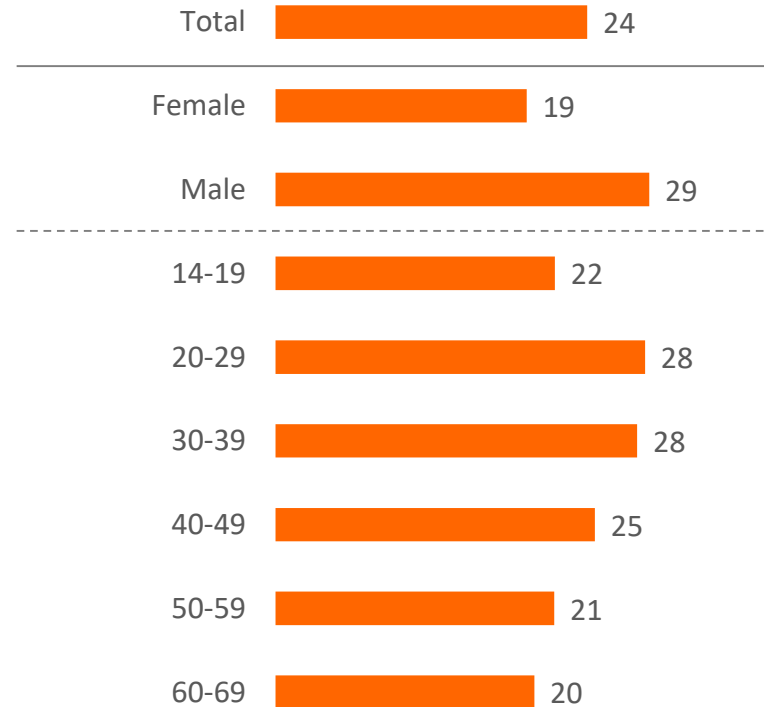
## In terms of socio-demographics

### Experience

*"Have you ever used a bicycle with an electric motor (pedelec) for support?"*



### Experience by gender and age



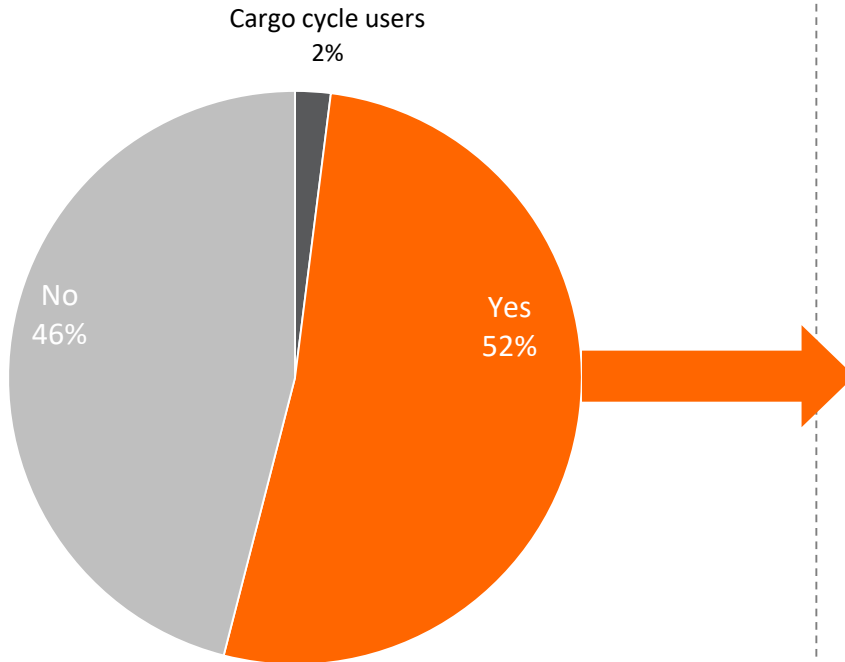
Figures in percent  
N = 3,053; all persons surveyed

# Awareness and use of cargo bicycles

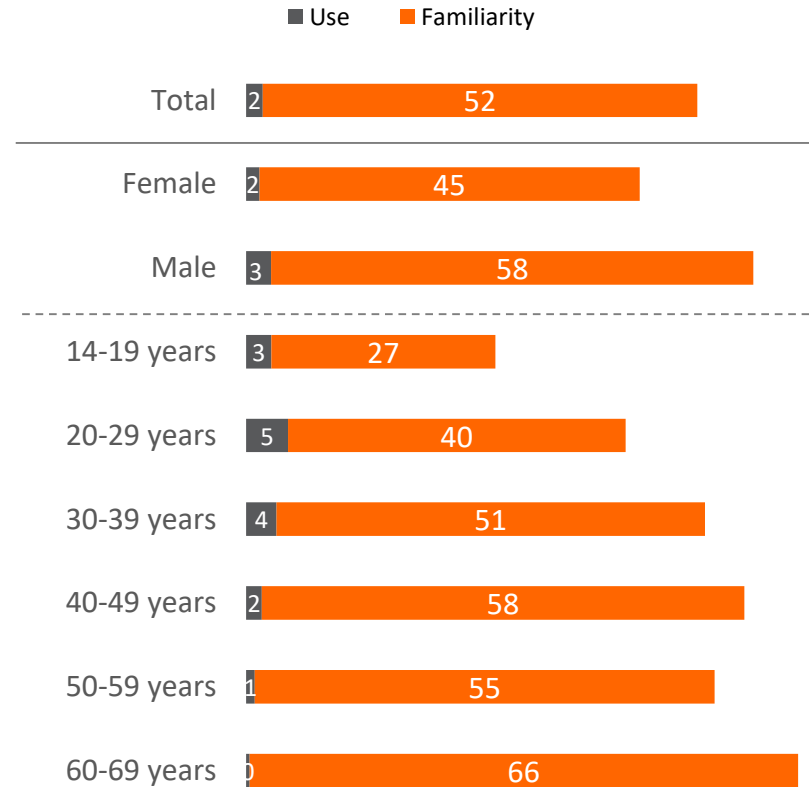
## In terms of socio-demographics

### Awareness and use of

*"Have you ever heard of cargo cycles?"*



### Awareness and use of by gender and age



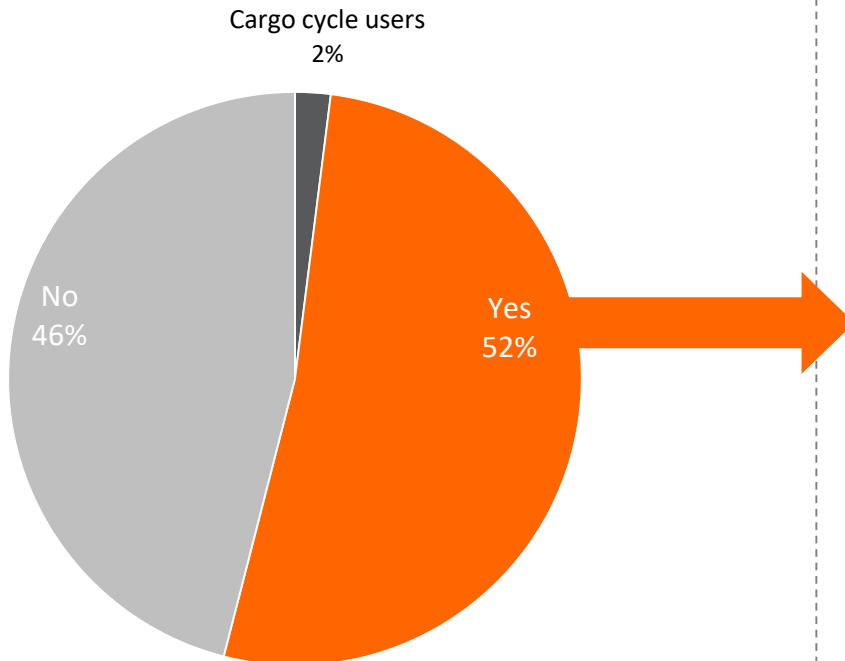
Figures in percent

N = 3,053; all persons surveyed

# Awareness and buying potential of cargo bicycles

## Awareness and use of

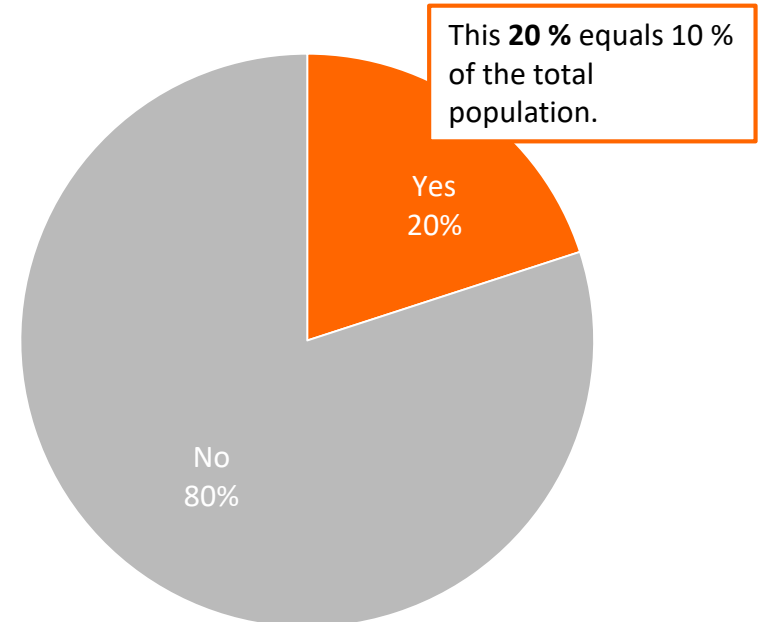
*"Have you ever heard of cargo cycles?"*



N = 3,053; all persons surveyed

## Buying potential

*"In general, could you imagine buying a cargo cycle?"*

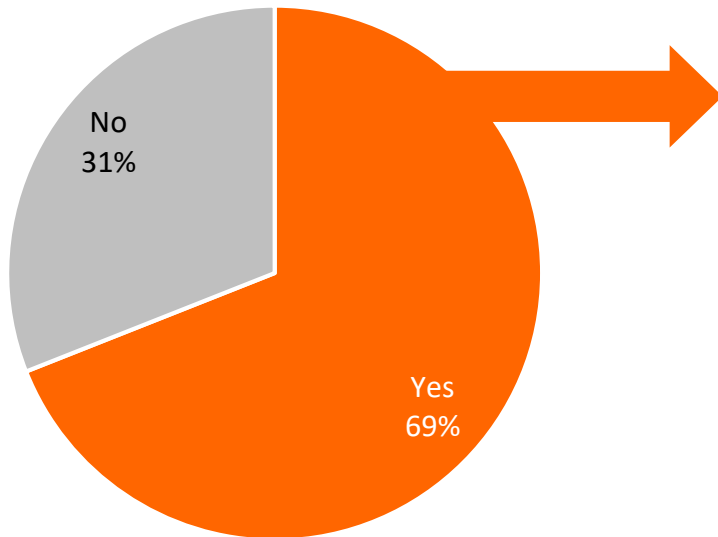


N= 1,578; cargo cycles known, but no owner

# Awareness and spread of bike sharing

## Awareness of

“Have you ever heard of public rental bike systems?”

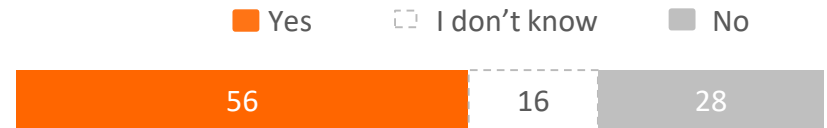


Focus on major cities:  
Population of 500,000 or more:  
79 %

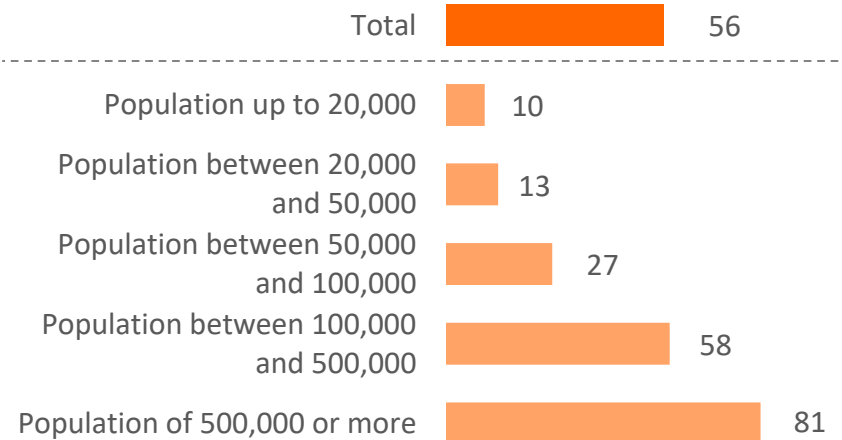
N = 3,053; all persons surveyed

## Spread

“Is there a bike rental system at your place of residence?”



## Spread by size of town/city



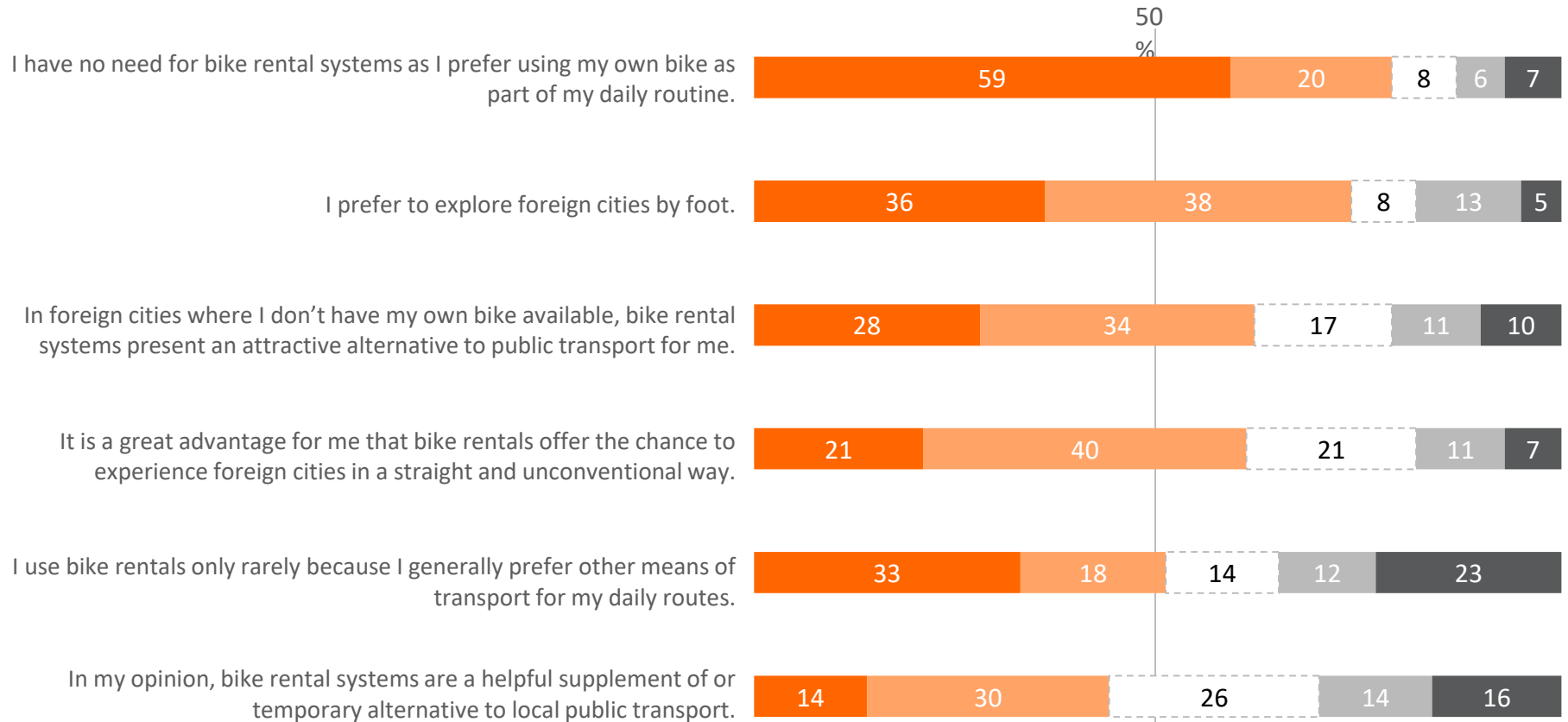
Figures in percent

N = 2,111; hire cycles known

# Statements regarding bike sharing (1/2)

*“To what extent do you agree with the following statements regarding bike rental systems?”*

■ Fully agree    
 ■ Partially agree    
 ■ Don't know    
 ■ Fully disagree    
 ■ Rather disagree



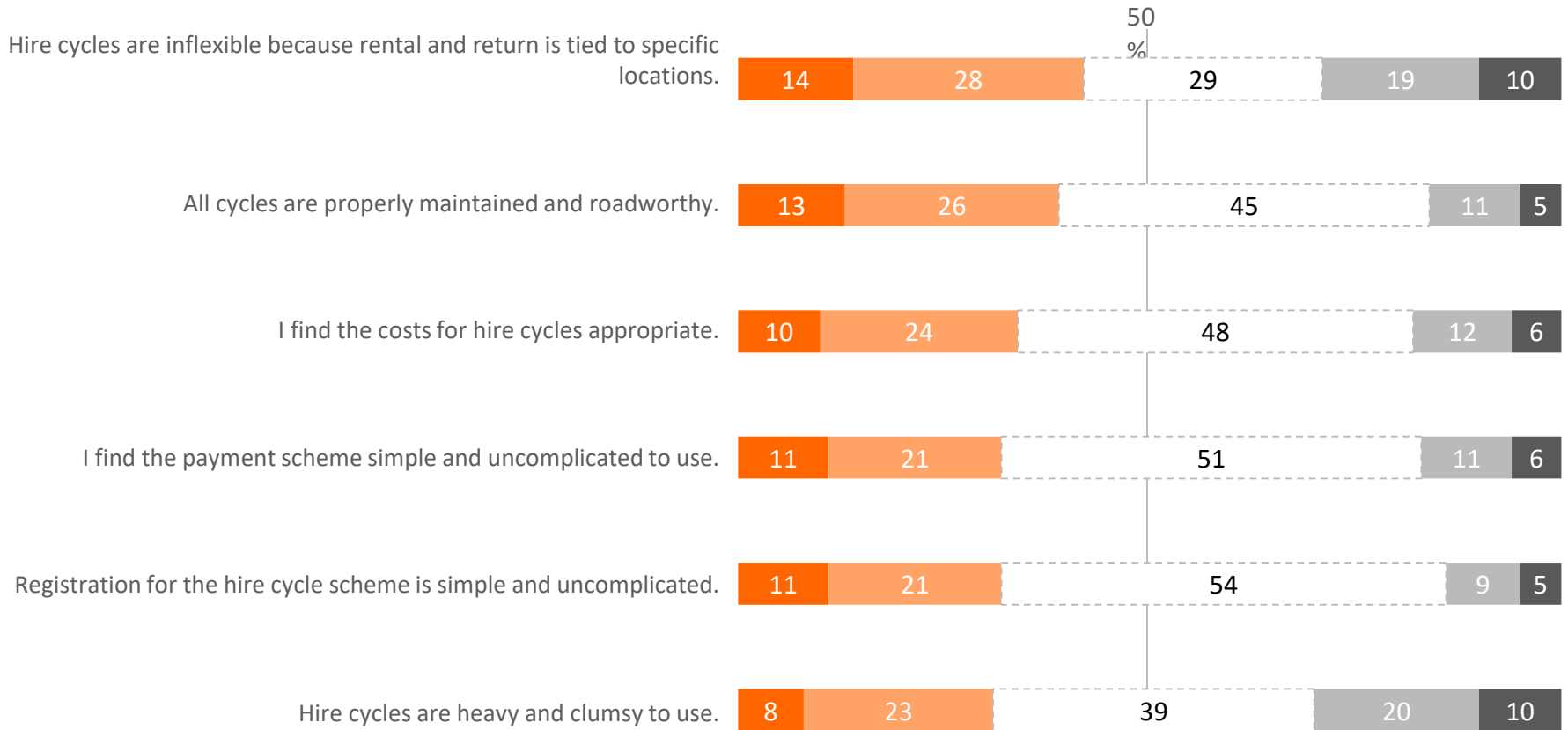
Figures in percent

N= 2,111; hire cycles known

# Statements regarding bike sharing (2/2)

"To what extent do you agree with the following statements regarding hire cycle schemes?"

■ Fully agree    
 ■ Partially agree    
 ■ Don't know    
 ■ Fully disagree    
 ■ Rather disagree



Figures in percent

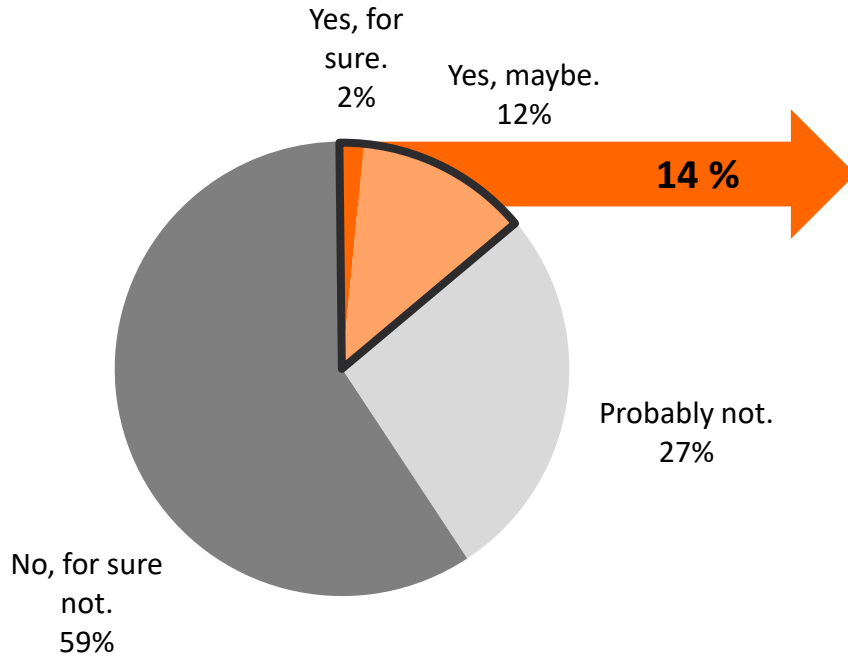
N= 2,111; hire cycles known

# Buying potential of personal light electric vehicles

## In terms of socio-demographics

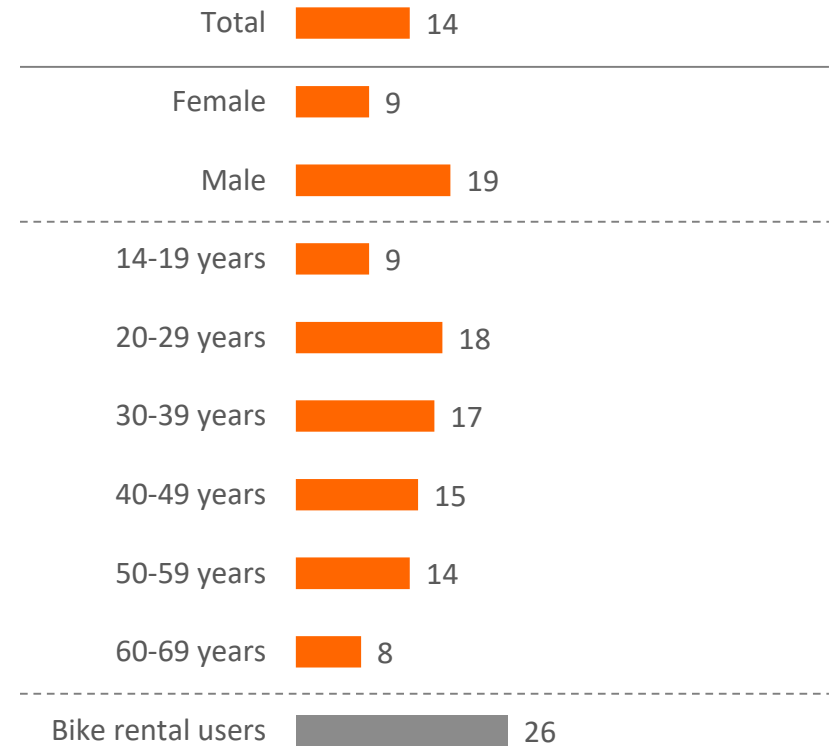
### Interest

"Are you planning on buying a micro electric vehicle in the next twelve months?"



### Interest by gender and age

(yes, for sure/yes, maybe)



Figures in percent  
N = 3,053; all persons surveyed



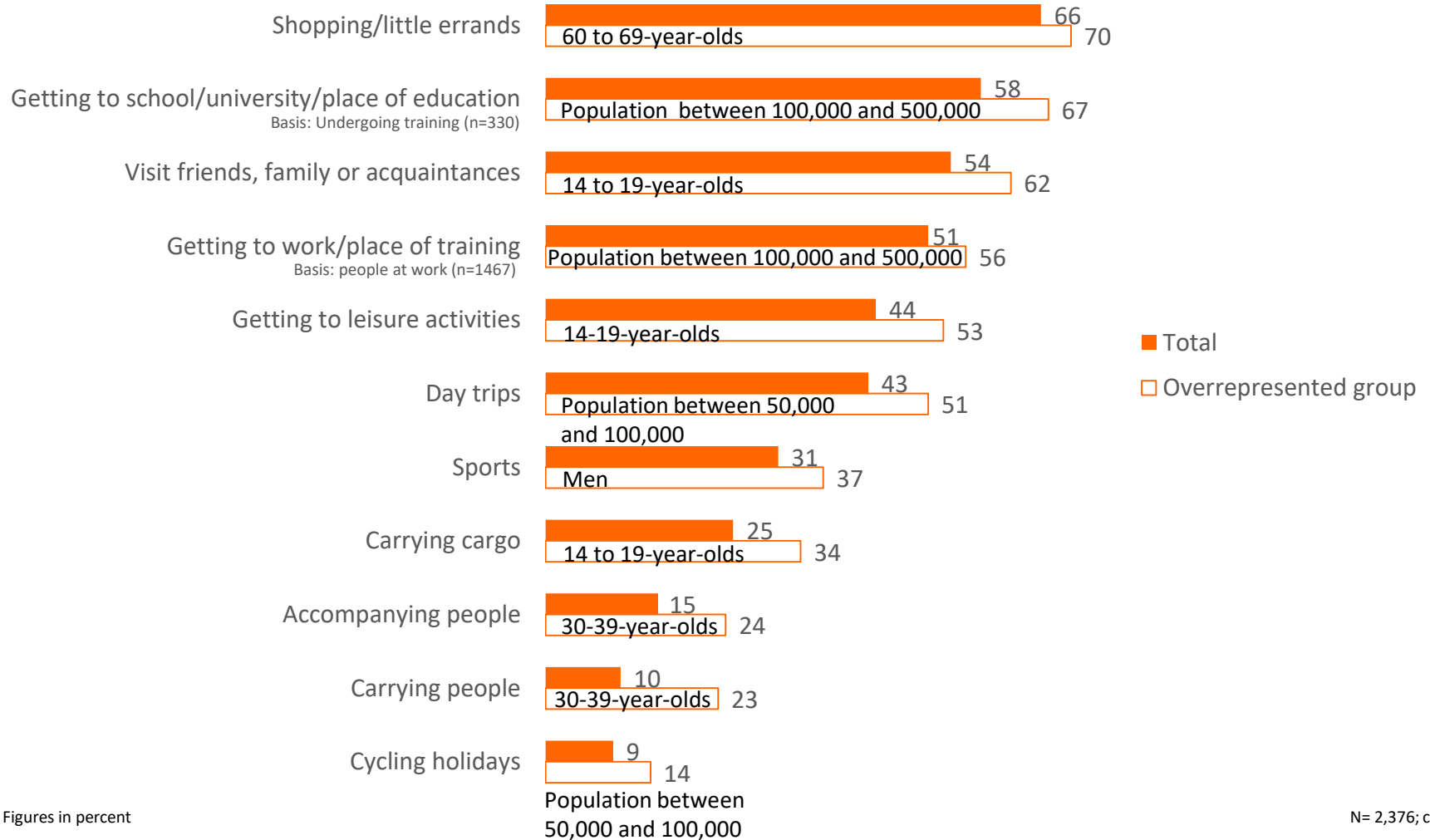
04

# Reasons for travelling by bicycle and commuting potentials via bike superhighways

# Reason to use the bicycle

## Total and relevant above average groups

“How often do you use the bicycle for the following reasons?” (daily/several times a week/a few times a month)



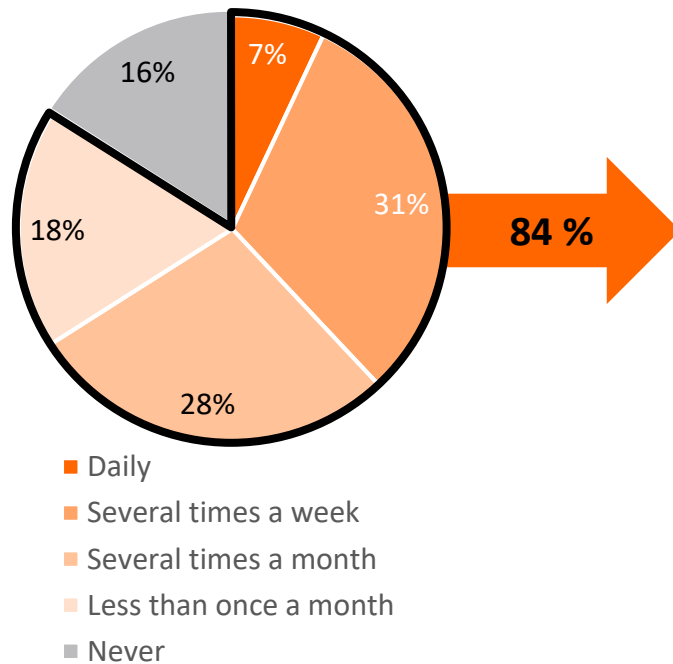
Figures in percent

N= 2,376; cyclists

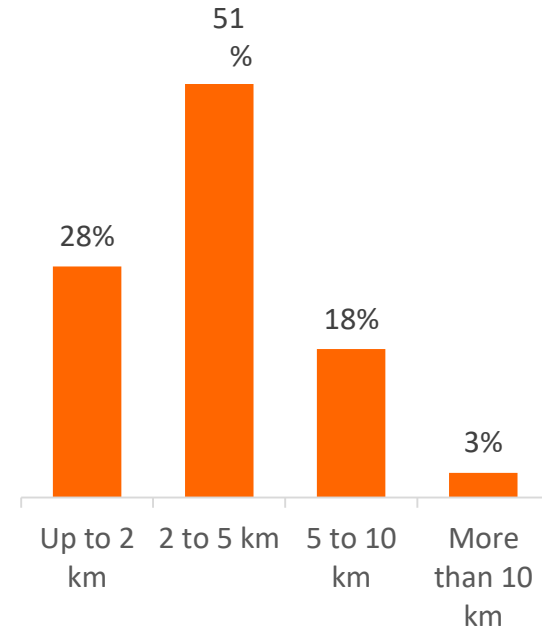
# Reason to use the bicycle – short errands

## Maximum distances

Frequency

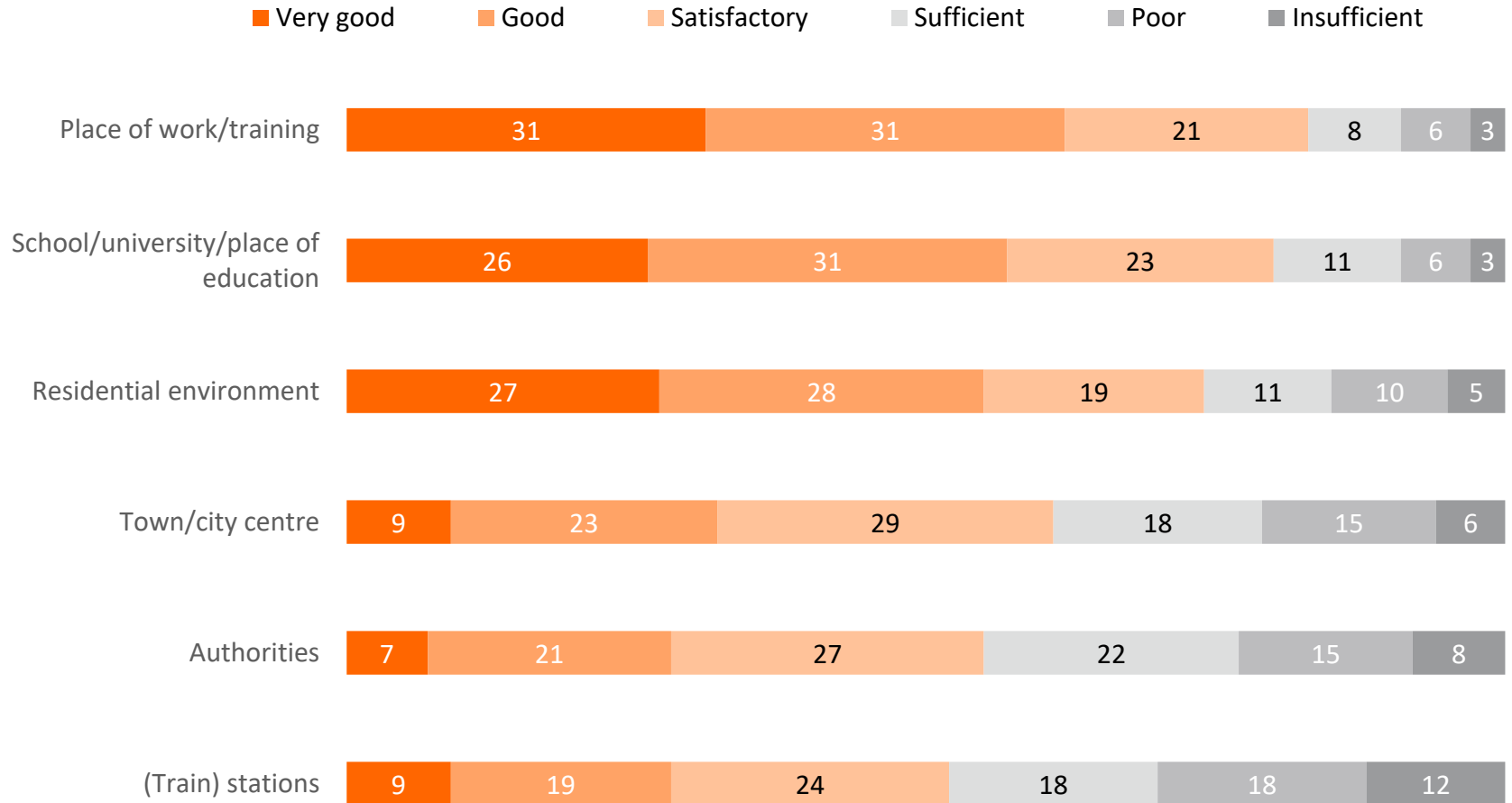


Maximum distance



# Satisfaction with parking situation

"Please assess the parking situation at the following locations using school grades."



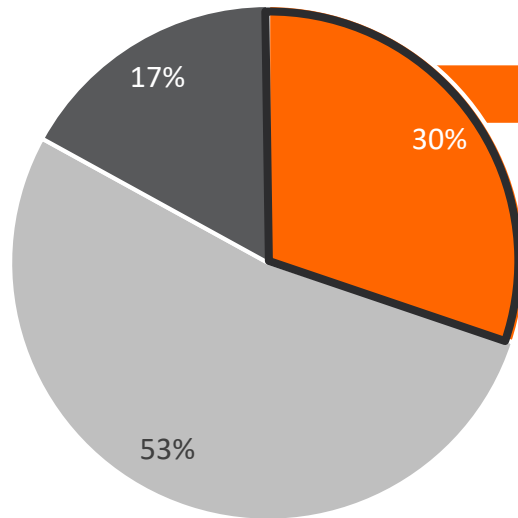
Figures in percent

N= 2,376 persons surveyed; however, as up to 50 % made no indication in each category, adjustments were made.

# Use of the bicycle to get to place of work/education

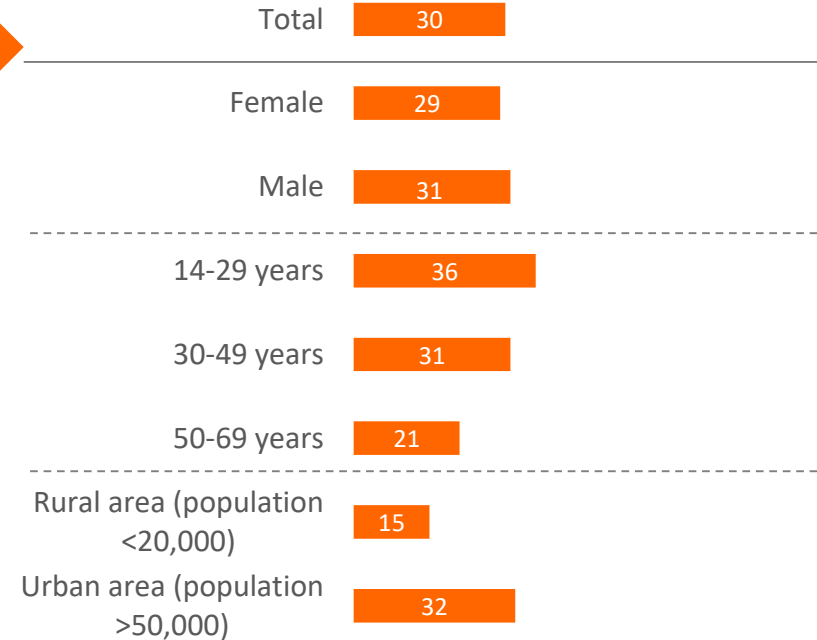
## In terms of socio-demographics

Regular use of the bicycle to get to place of work/education  
(at least a few times a week)



- Regularly use the bicycle for commuting
- Use the bicycle, but not/irregularly for commuting
- Never use the bicycle

Bicycle commuters  
by gender, age, urban/rural area



N= 2,155; employed or undergoing training

# Reasons not to use of the bicycle to get to place of work/education

“For which of the following reasons do you not use the bicycle to get to your place of work/training or to school/university/the place of education?” (more than one answer possible)

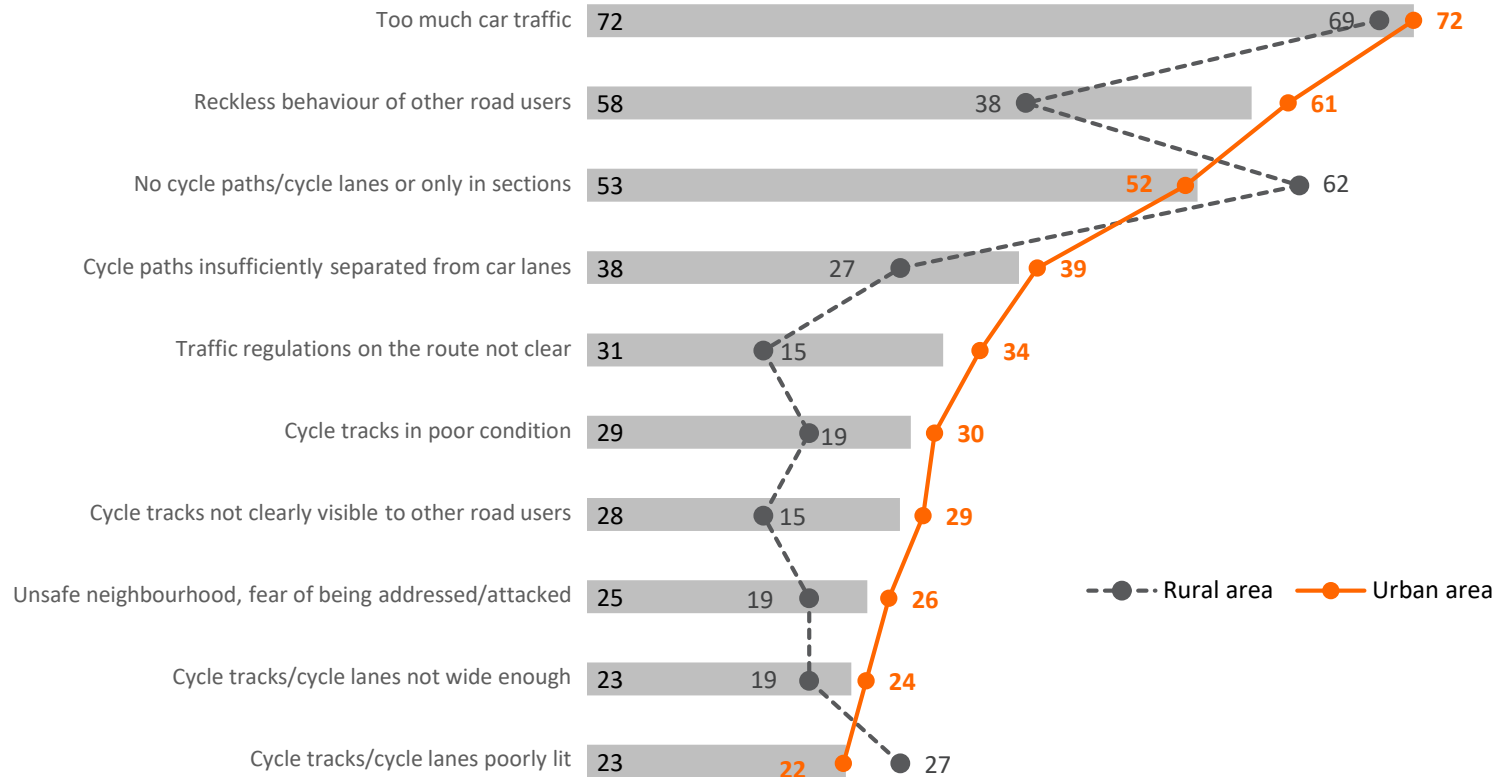


Figures in percent

N= 1,151; cyclists who do not/irregularly use the bicycle to get to the place of work/training OR to school/university/the place of education and who are employed or undergoing training

# Perceived dangers

“Why is it too dangerous (to use the bicycle to get to the place of work/education)?” (more than one answer possible)

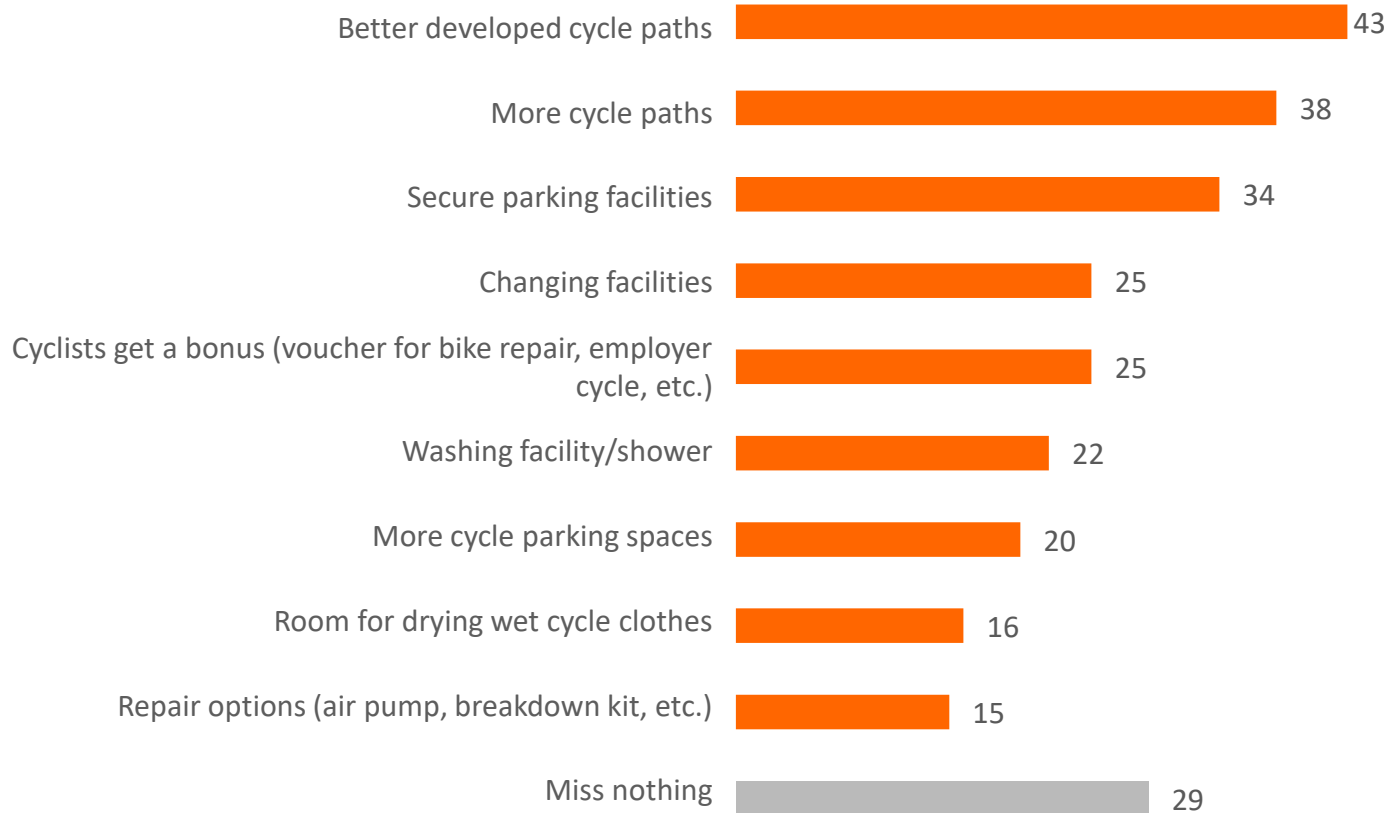


N= 214; cyclists who don't use the bicycle to get to the place of work/education because they think it is too dangerous

Figures in percent

# Incentives to use the bicycle to get to place of work/education

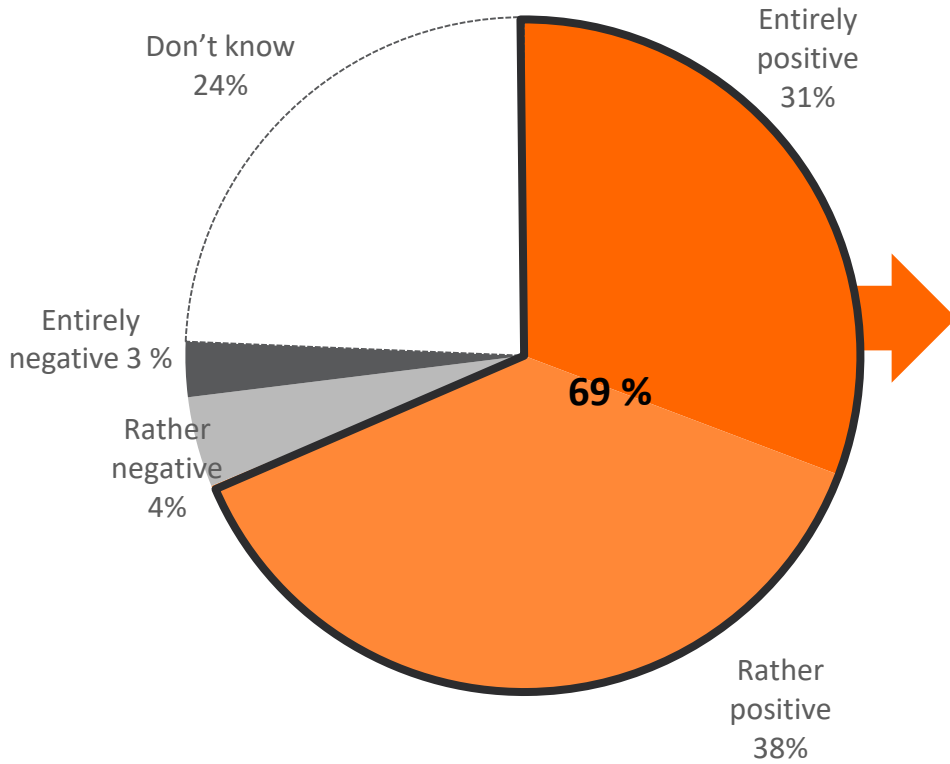
*“What would be important for you to use the bicycle to get to your place of work/training or to school/university/the place of education?” (more than one answer possible)*





# Assessment of the cycle superhighway initiative of the Federal Government

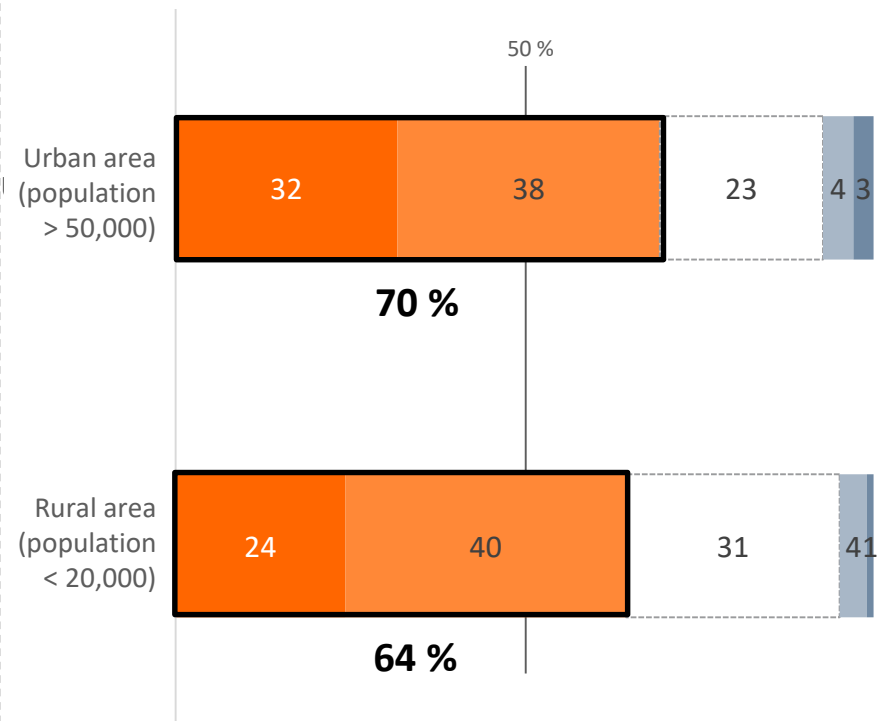
*“In general, how do you assess the initiative to set up cycle superhighways nationwide so that commuters, in particular, use the bicycle more often to get to their place of work/training?”*



Figures in percent

## Assessment by urban/rural area

■ Entirely positive   
 ■ Rather positive   
  I don't know  
■ Rather negative   
 ■ Entirely negative

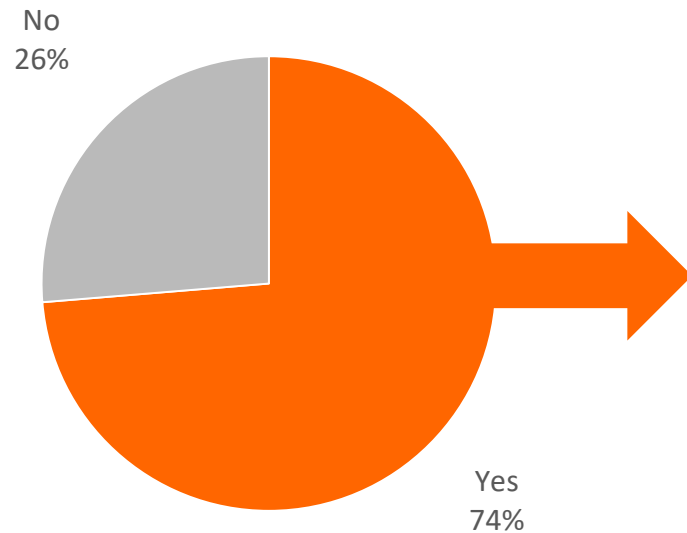


N = 3,053; all persons surveyed

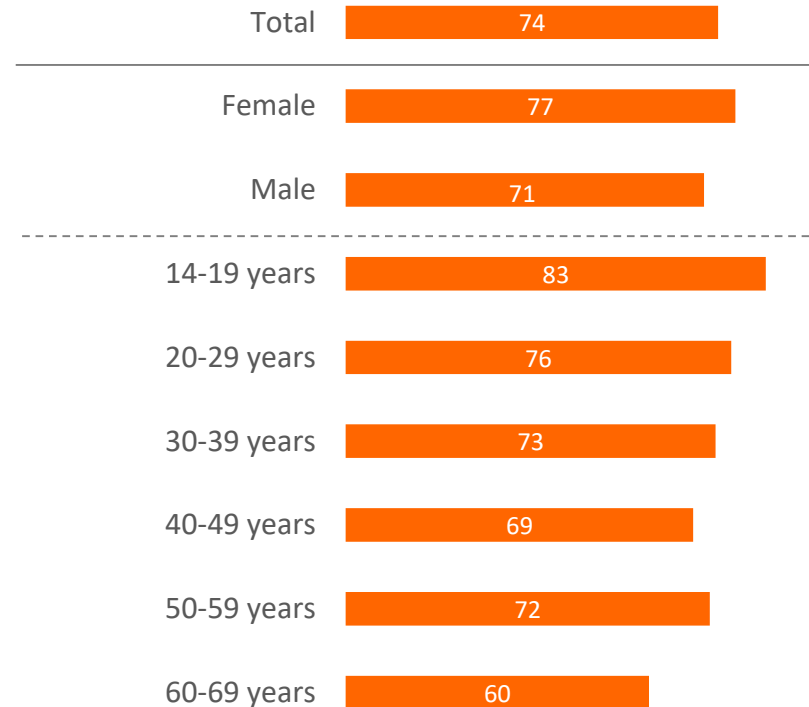
# Cycle superhighways & commuting potential

## More frequent bicycle use of bicycle commuters – in terms of socio-demographics

Assuming there was a cycle superhighway to your place of work/education. Could you imagine to use the bicycle more frequently for this route if this was the case?



### Commuting potential by gender and age



Figures in percent

N= 1,201; persons surveyed who use the bicycle for the way to school/university/place of education or to the place of work/training

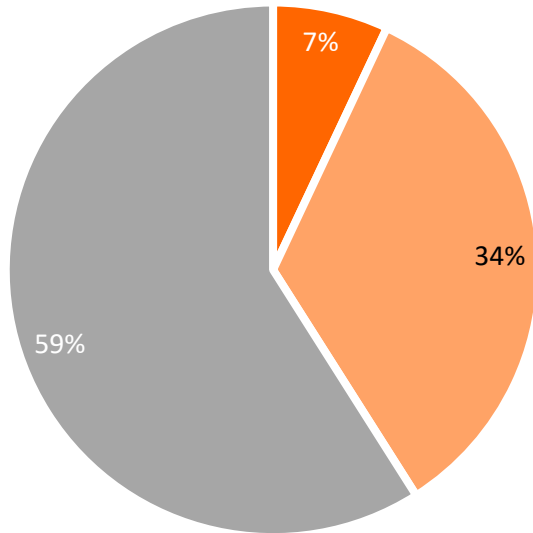
05

# Protected bike lanes and cycle-only roads

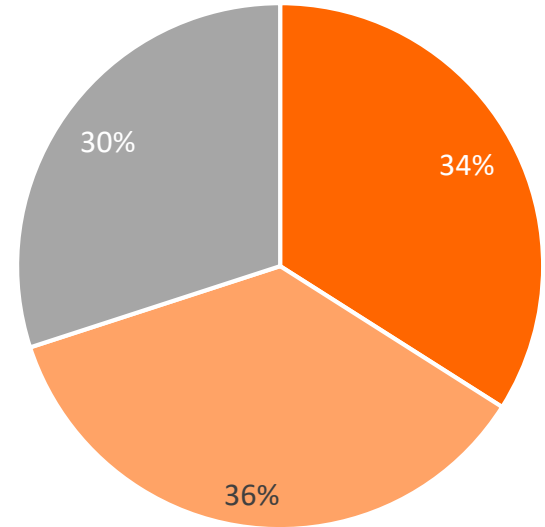
# Protected bike lanes and cycle-only roads

## Awareness and use of

Protected bike lanes



Cycle-only roads

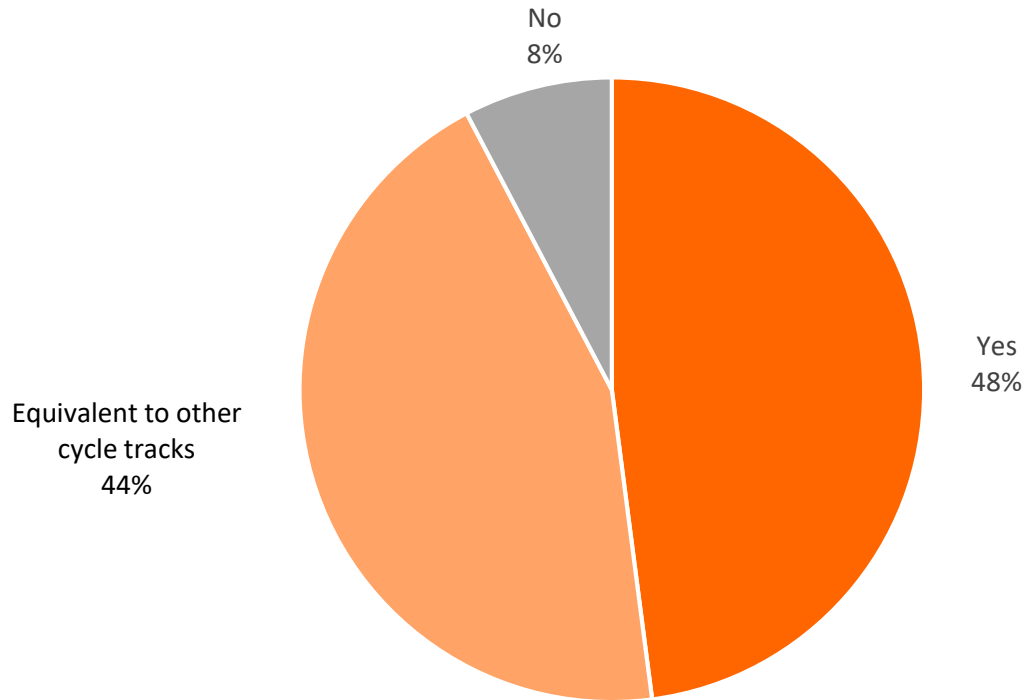


- Already used
- Known, but not yet used.
- Unknown

N = 3,053; all persons surveyed

# Preference of cycle-only roads over other cycle tracks

*"Do you prefer cycle-only roads over other cycle tracks?"*



N= 922; persons surveyed who have already use a cycle-only road

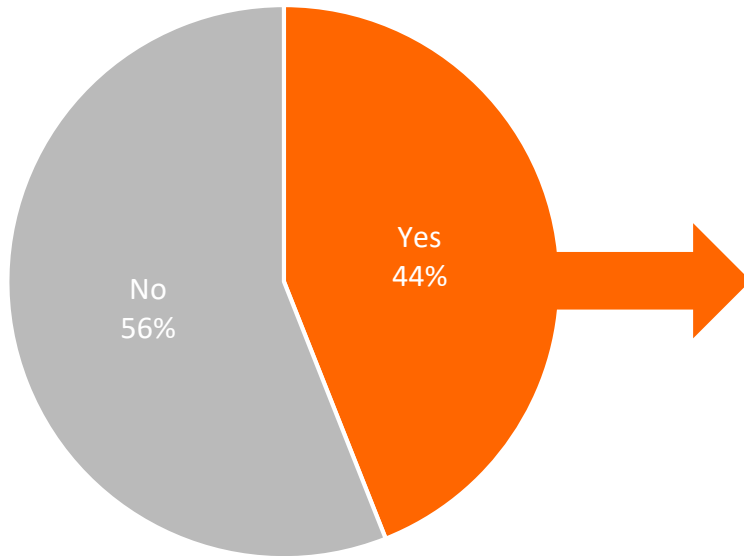
06

# Bicycle tourism and bicycle market

# Bicycle tour in the last two years

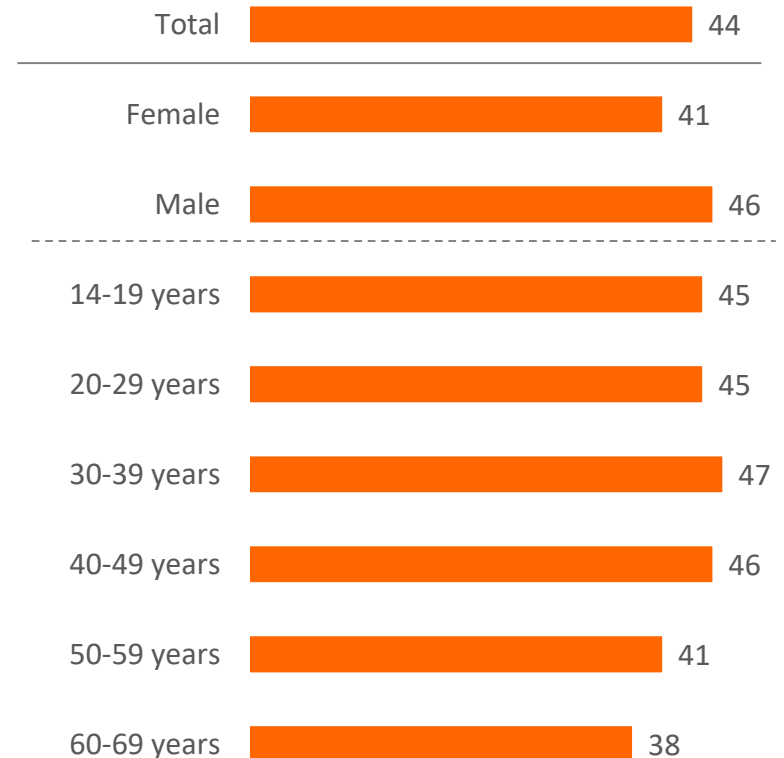
## In terms of socio-demographics

*"In the last two years, have you taken a cycling tour of at least ½ day up to several days?"*



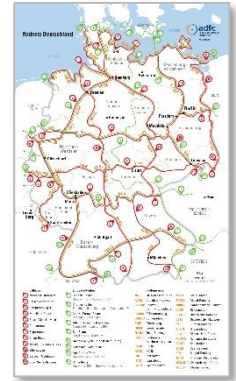
N= 2,376: Cyclists

## Separated by gender and age

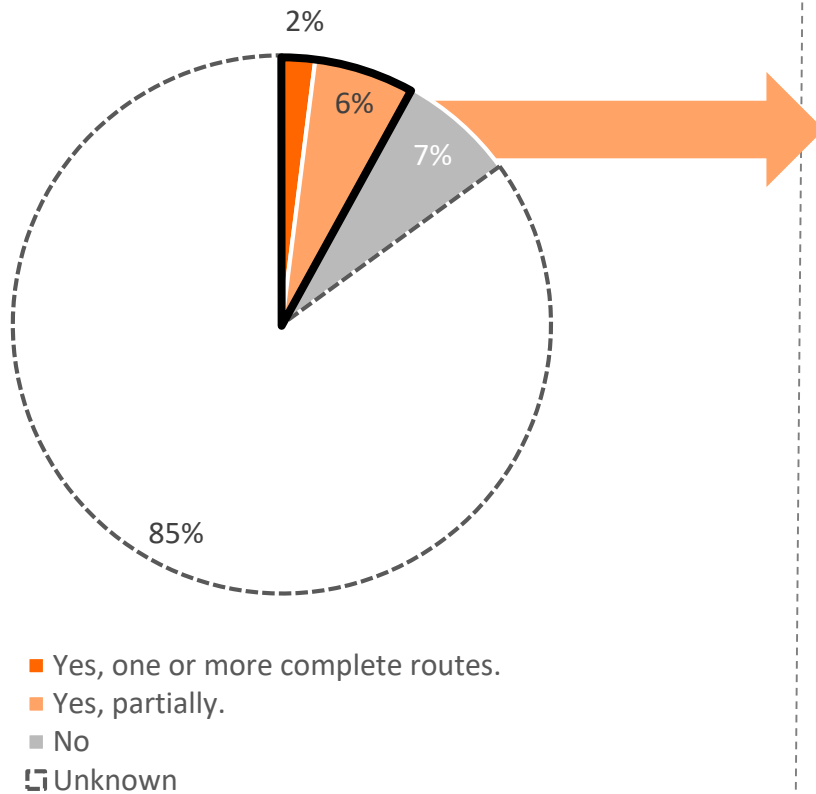


Figures in percent  
N= 2,376; cyclists

# Use of D-routes

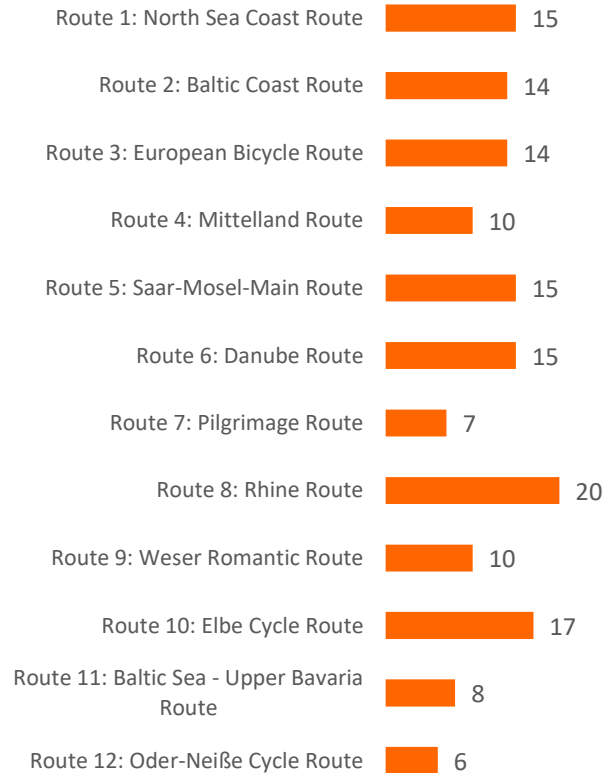


“Have you ever used a ‘D route’?”



N = 3,053; all persons surveyed

“Which ‘D-route(s)’ have you already used?”  
(more than one answer possible)



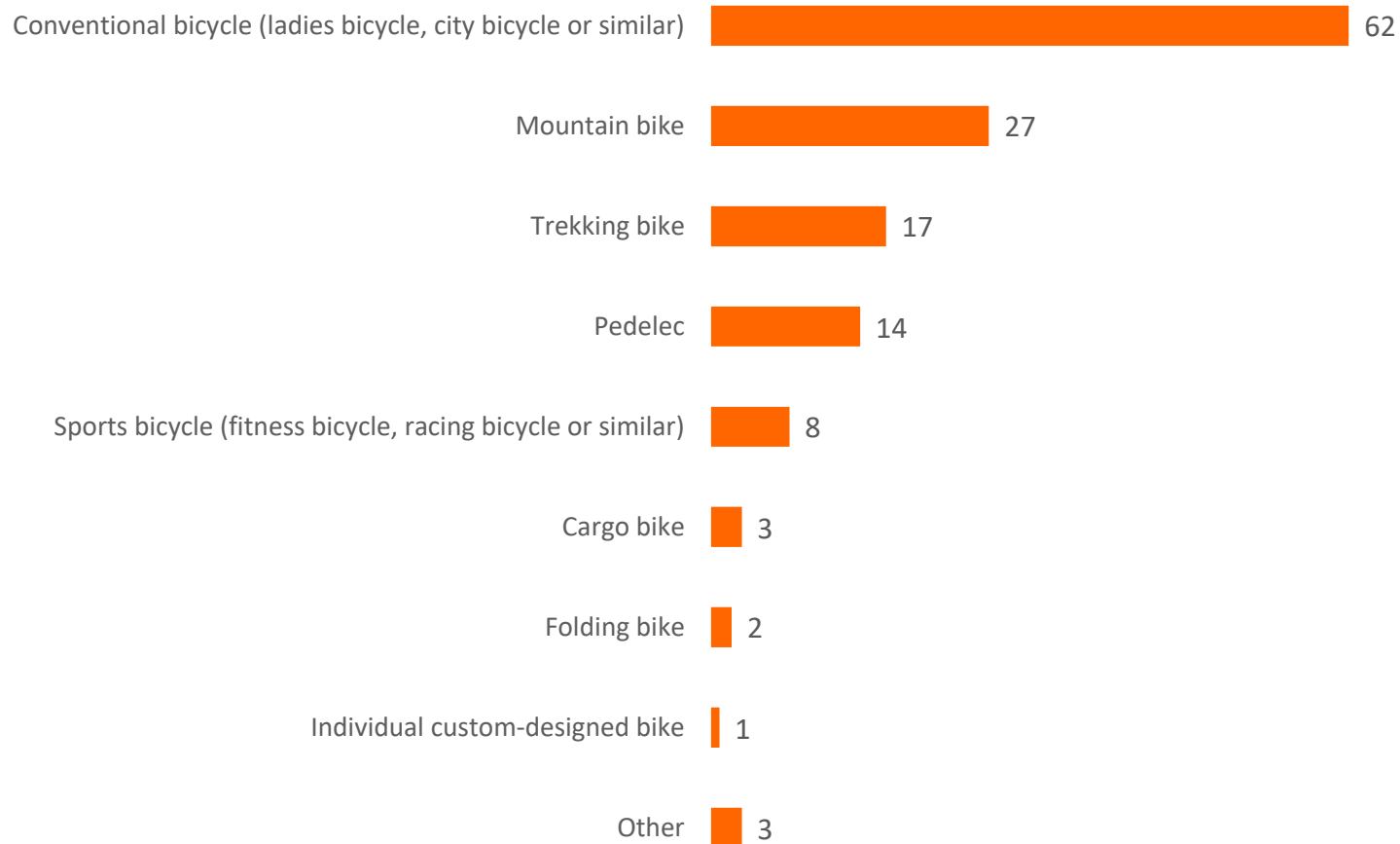
Figures in percent

N= 229; persons who have already cycled on a D route



# Type of bicycle used

*“What type of bicycle or what types of bicycles do you personally use?” (more than one answer possible)*

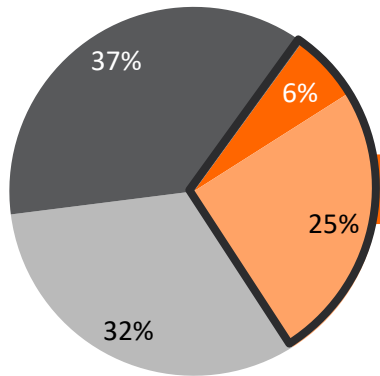


# Plans to buy a bicycle

## Type of bicycle and budget

1. "Are you planning on buying a new bicycle in the next twelve months?"
2. "What type of bicycle or what types of bicycles will you most probably buy then?"
3. "How much will you probably spend on this bicycle including accessories?" (aggregate of all types of bicycles)

### 1. Planned purchase

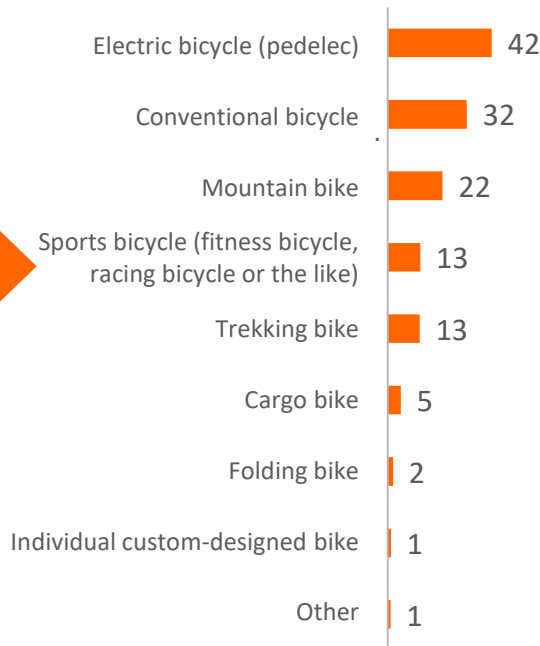


- Yes, for sure.
- Yes, maybe.
- Probably not.
- No, for sure not.

Figures in percent

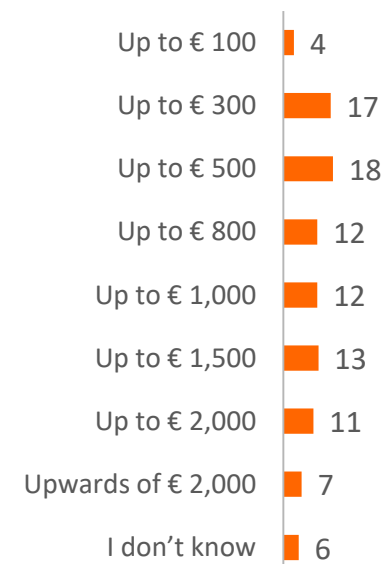
N = 3,053; all persons surveyed

### 2. Type(s) of bicycles (more than one answer possible)



N= 933 persons, who are planning on buying a new bicycle in the next twelve months

### 3. Budget

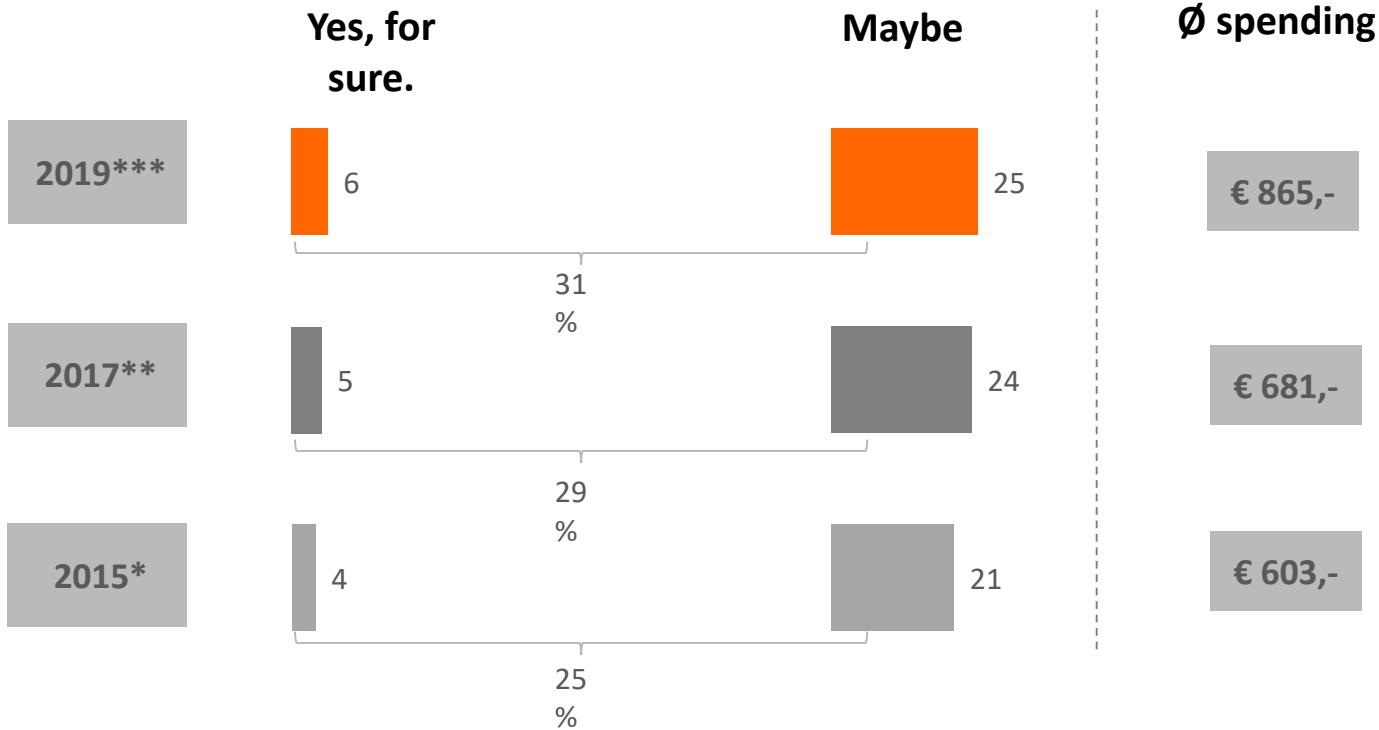


Ø approx. € 865,-

# Plans to buy a bicycle

## Time comparison survey 2019 – 2017 – 2015

“Are you planning on buying a new bicycle in the next twelve months?”  
 “How much will you probably spend on this bicycle including accessories?”



Figures in percent

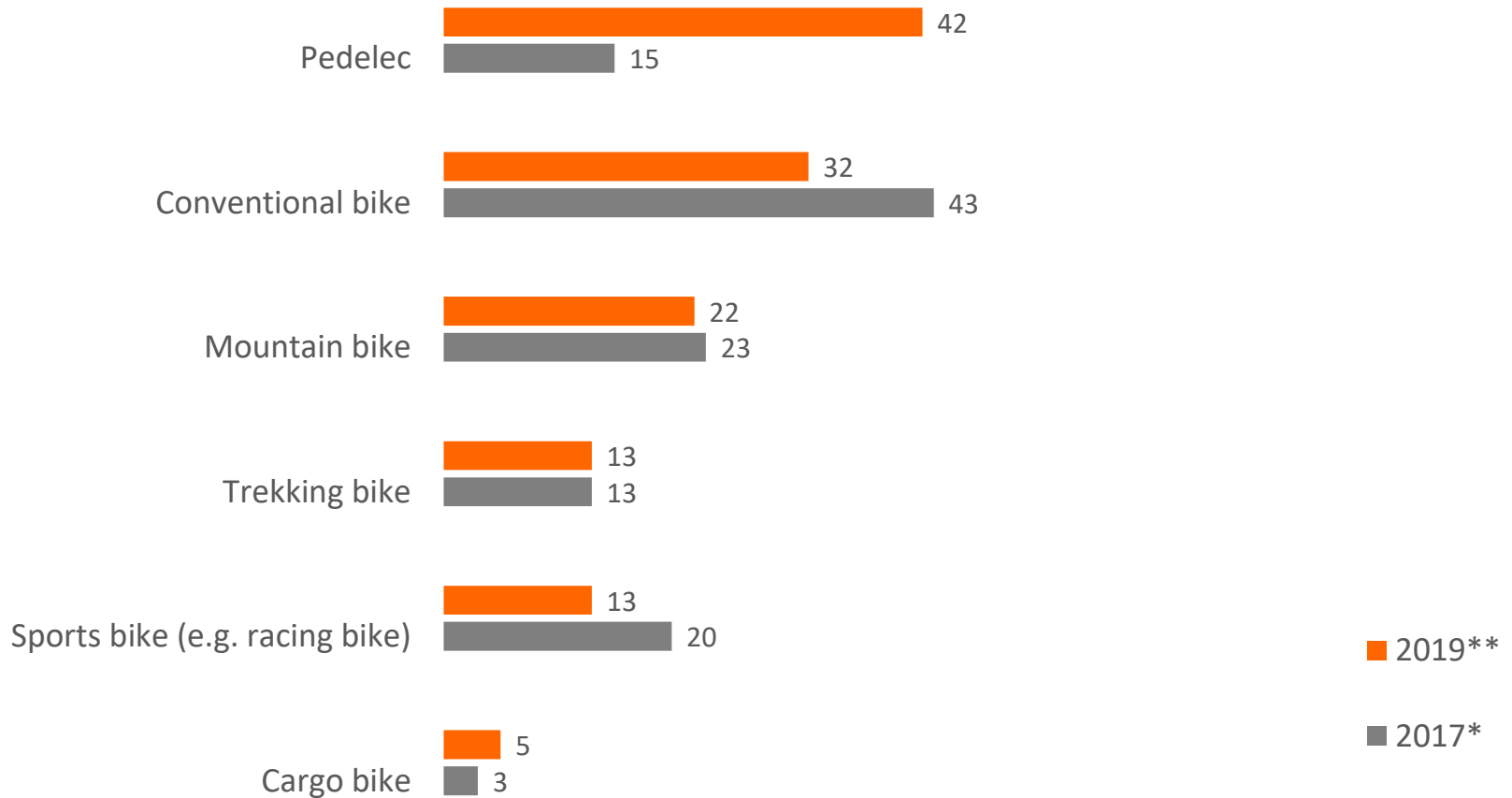
N = 3,053, all persons surveyed  
 \*\*N= 3,156 all persons surveyed  
 \*N= 2,000 all persons surveyed

\*\*\*N= 924 potential buyers  
 \*\*N= 925 potential buyers  
 \*N= 492 potential buyers

# Plans to buy a bicycle – type of bicycle

## Time comparison survey 2019 – 2017

“What type of bicycle or what types of bicycles will you most probably buy then?” (more than one answer possible)



Figures in percent

\*\*N= 924 potential buyers  
\*N= 925 potential buyers

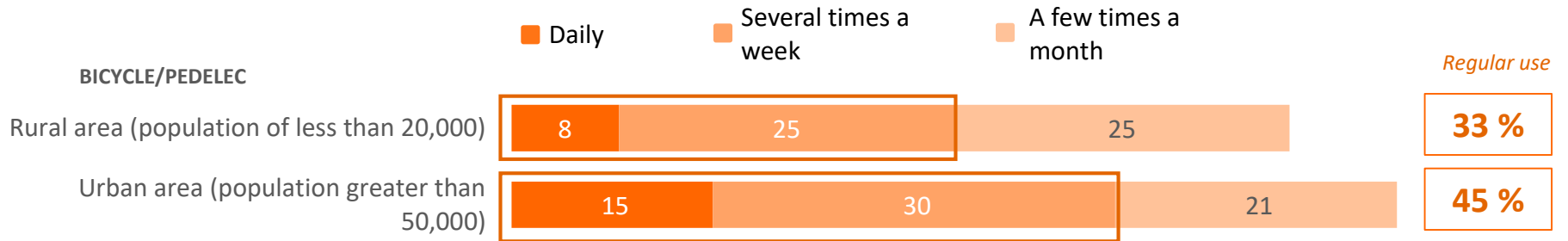
07

Comparison: cyclists in rural areas vs. cyclists in urban areas

# Frequency of bicycle use

## Urban vs. rural area

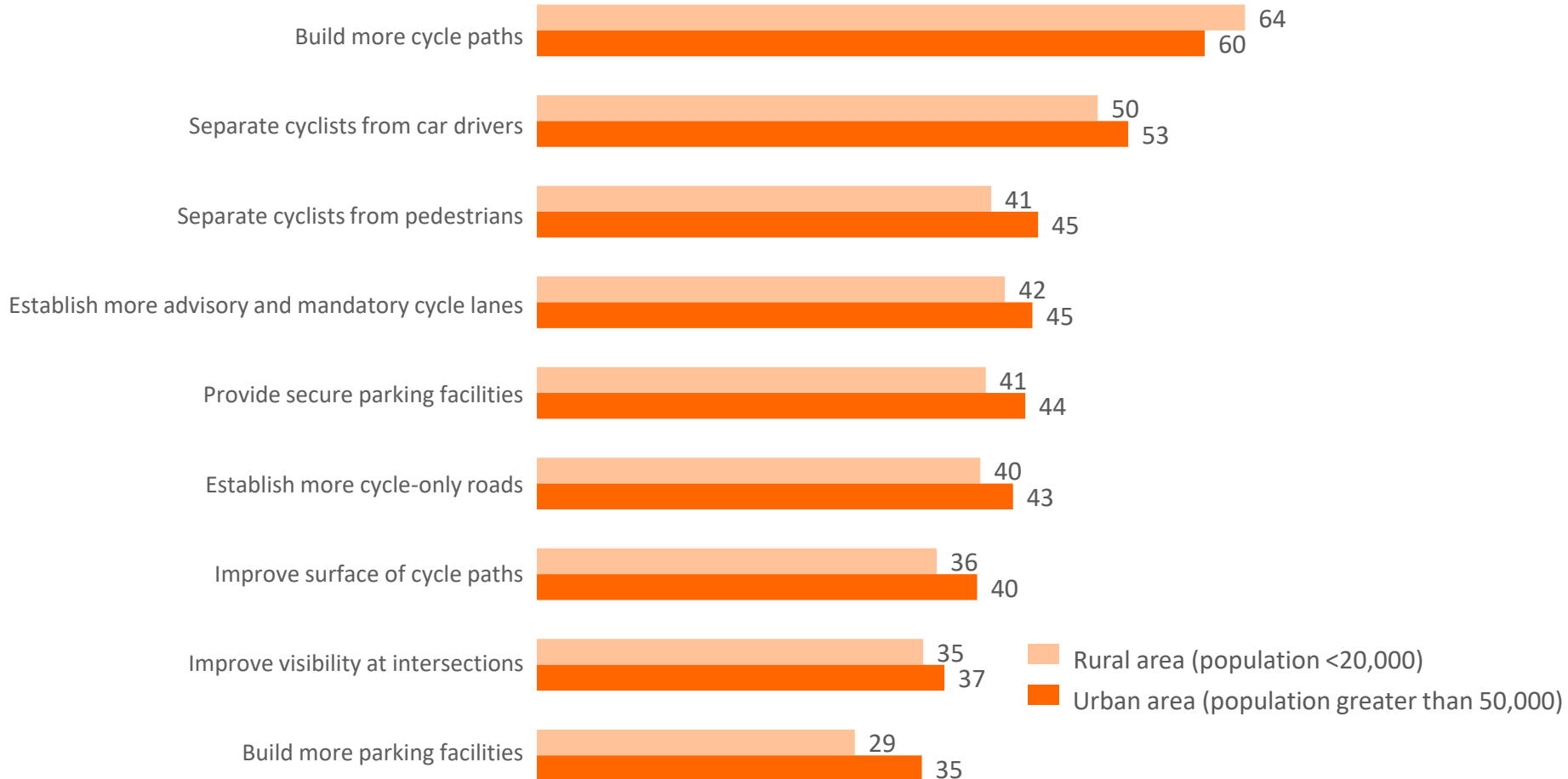
"How often do you use the bicycle/pedelec?"



# Improvements for cycling (1/2)

## Urban vs. rural area

"In your opinion, what are the areas where politicians could do more for cycling?" (more than one answer possible)



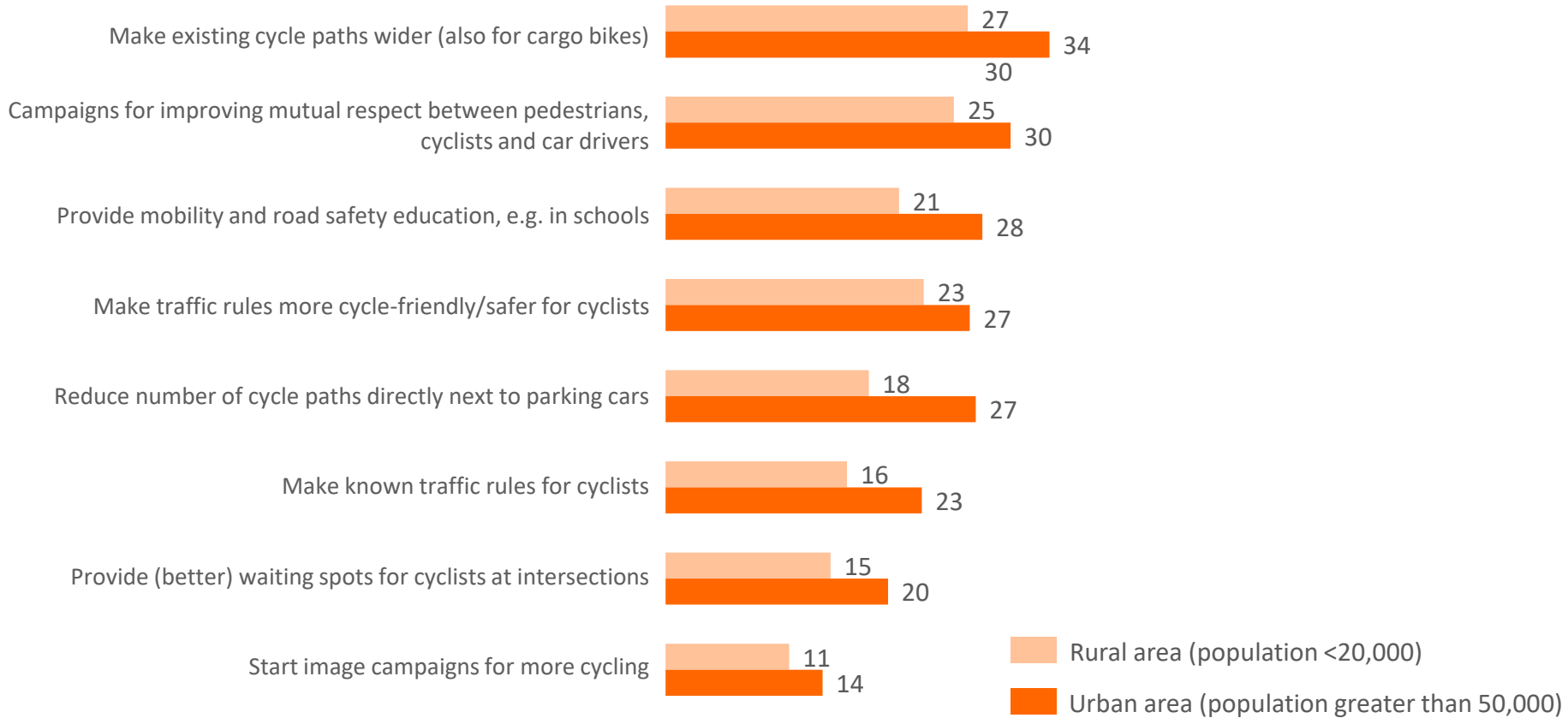
Figures in percent

N = 3,053; all persons surveyed

# Improvements for cycling (2/2)

## Urban vs. rural area

"In your opinion, what are the areas where policymakers could do more for cycling?" (more than one answer possible)

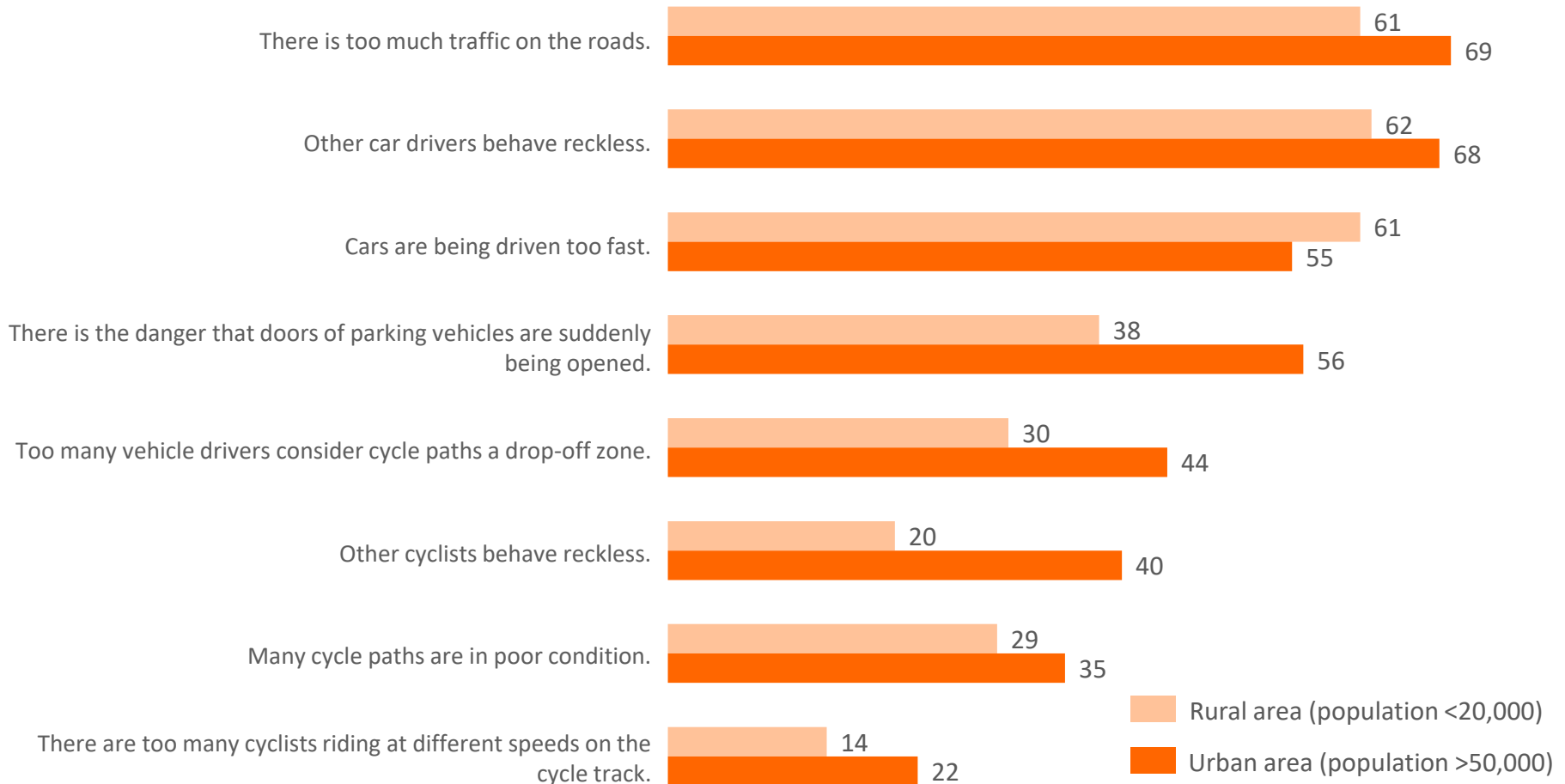




# Reasons for insecurity

## Rural vs. urban area (selection of statements with relevant deviations)

*"Why do you feel (rather) insecure?" (more than one answer possible)*



Figures in percent

N= 1,035; cyclists who feel (rather) insecure on the bicycle

# Summary: urban vs. rural area

## Overview of the most significant differences

	Rural area (population up to 20,000)	Urban area (population of 50,000 or more)
Means of transport that will be used more frequently in the future*	Car (34 %)	Bicycle (43 %)
Regular bicycle use (at least several times a week)	33 %	45 %
Reasons insecurity on bicycle* (Basis: cyclists who feel insecure)	Reckless car drivers (62 %)	Too much traffic on the roads (69 %)
Most frequently used type of bicycle routes* (Basis: cyclists)	Roadway without marked cycle lanes (51 %)	Roadway with separately marked cycle lanes (53 %)
Feeling of security on this type of track	80 % feel insecure	34 % feel insecure
Regular use of cycle helmets (Basis: cyclists)	37 %	38 %
Cycling in my city is fun.	55 %	49 %
Awareness of bike rental systems	56 %	71 %
Interest in pedelecs	48 %	44 %
Awareness of cargo bikes	41 %	56 %
Cargo bike potential	7 %	11 %

\*refers to the most frequently given response in each case

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