

Cycling Monitor Germany 2023



Results of a representative online survey

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sinus:

Part of the INTEGRAL-SINUS-OPINION Group

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Representative online survey on the state of cycling in Germany

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Further and detailed results as well as information on the method and the sample can be found in the full report (in German).



1 Key findings

Key findings (1/10)

Chapter “Use of transport“

39% of Germans aged between 14 and 69 use a bicycle or pedelec regularly, i.e. daily or several times a week as a means of transport and/or for leisure.

- This proportion of users remains roughly constant compared to previous years (2021: 38%, 2020: 40% regular use).
- The bicycle without electric assistance is used slightly more frequently as a means of transport in everyday life (e.g. for commuting to work, errands/shopping, travelling to friends) than for leisure purposes (e.g. for cycling trips or training sessions) (means of transport: 30% at least several times a week vs. leisure: 22%). The same pattern can be seen at a lower level for pedelecs (means of transport: 9% at least several times a week vs. leisure: 7%).

The bicycle or pedelec is the means of transport with the greatest potential for growth in the comparison of means of transport, as 46% of respondents want to use it more often in future than they do now. They are followed in second and third place by travelling by car (32%) and on foot (31%).

Individual mobility behaviour has changed in recent years. Various modes of transport have become subjectively more attractive to people in Germany, even if their actual use or popularity has not changed to the same extent.

- 50 % of respondents state that the bicycle/pedelec has become more attractive to them in recent years.
- 52% say this about the car and 40% about travelling by foot.
- In contrast, local public transport has become more attractive for 23% and long-distance trains for 13%. Due to the survey period from mid-May to the beginning of June 2023, the data is unlikely to adequately reflect the effect of the Deutschlandticket, which was introduced on 1 May 2023.

Even though 39% regularly use a bicycle or a pedelec, only 14% of respondents are most likely to identify themselves as cyclists. 49% of respondents identify themselves as car drivers instead.

Key findings (2/10)

Chapter “Bicycle use occasions“

Around a third of cyclists use this mode of transport intensively, as 29% of cyclists have recently travelled more than 30 km by bike per week. Further 37% of cyclists have cycled less than 30 km and 31% have not cycled at all.

In general, the bicycle is most frequently used for short errands or for shopping (57% at least a few times a month), for visiting friends, family or acquaintances (45%) and for day trips (37%).

Among working people, 22% regularly cycle to work, while 28% of people in education or training do so.

- The most common reasons given by cyclists who rarely or never use their bike to commute are that the journey is too far (54%), the journey takes too long (43%) or they don't like being exposed to wind and weather (27%). 14% do not cycle to work / education because it is too dangerous.

Slightly less than half of children aged between 0 and 15 (47%) cycle several times a week. This means that children cycle more often than adults (39%).

For many cyclists, taking their bike on public transport is important, especially on local and regional trains. A majority of 56% of cyclists consider it important to take their bikes on local and regional trains and 50% are satisfied with this.

Carriage on long-distance trains is important for 42% of cyclists, but only 34% rate the possibility of taking bikes on long-distance trains positively. Bus (37%), tram (36%), underground (36%) and long-distance buses (21%) follow in terms of the relevance of bicycle transport.

- Around one in five cyclists (19%) use the option of taking their bike on public transport. Further 17% leave their bike at the station or at a bus stop.
- Local and regional trains are most frequently combined with cycling (75% of those who take their bike with them on public transport and 70% of those who leave their bike at a public transport station).
- All other modes of transport (e.g. buses, trams, subway, long-distance trains) and their stops are still relatively rarely combined with cycling.

Key findings (3/10)

Chapter “Reasons for and against bicycle use“

25% of the German population rarely or never use a bicycle or a pedelec. The five most common reasons for those who rarely or never cycle are:

- Being exposed to the weather (70 %)
- Regular transport by car (68 %)
- The distances are too far (67 %)
- Feeling at the mercy of other road users (65%)
- Cycling is too strenuous (62%)

Key findings (4/10)

Chapter “Safety“

The majority of all respondents (53%) enjoy cycling in their municipality. However, only 40% of respondents feel that road users show sufficient consideration for each other.

The feeling of safety among cyclists in road traffic is 60% and has therefore fallen slightly compared to 2021 (2021: 63%, 2019: 57%). Accordingly, 40% of cyclists do not feel safe on their bike.

- The main causes of insecurity are inconsiderate drivers (64% of respondents who feel unsafe agree), too much traffic (59%) and excessive speeds of cars or other motorised vehicles (54%).

Almost half (47%) of all cyclists always (29%) or usually (18%) wear a cycle helmet. There has been a steady increase compared to previous years (2021: 45%, 2019: 38%).

Respondents feel safest on cycle paths and at junctions that are as separate as possible from other road users.

- According to the survey, more than 9 out of 10 respondents feel (rather) safe on well-developed cycle paths on the side of the road, which run separately from pedestrian traffic (94%), on agricultural roads (93%) and on protected bike lanes (93%).
- The respondents rated cycling without separation in mixed traffic (only 13% felt safe at 50 km/h and 21% at 30 km/h) and in bus lanes (29%) as particularly unsafe.
- The situation is similar at junctions: The safest intersections are those that are secured with bollards on the approach to the junction (75%), that have cycle paths up to the junction (60%) and at junctions with separate traffic light phases for cars and cyclists (60%).
- Intersections where cyclists use a roundabout together with cars (only 15% feel safe) or intersections in mixed traffic without separate guidance for cyclists (15%) are rated as unsafe.

Key findings (5/10)

Chapter “Cycling infrastructure“

Protected bike lanes have been increasingly installed in recent years. 12% of all respondents have already used them. After an explanation of the concept, a large majority (88%) of respondents generally rated the installation favourably.

Bicycle streets are also rated positively. This is shown on the one hand by the fact that this type of cycle traffic guidance is perceived as safe by cyclists (83% very/somewhat safe) and on the other hand by the fact that 48% of cyclists who have already used such a bicycle streets prefer it to other cycle paths.

Key findings (6/10)

Chapter “Cycling-friendliness of policy & employers”

The majority of Germans rate the politics as bicycle-friendly. The federal government's cycling policy is rated 1 to 3 by 52%, while the state governments receive a corresponding rating from 58% and the municipalities from 62%.

This means that the assessment of bicycle friendliness has increased significantly at all policy levels compared to the previous 2021 study (federal government 2021: 42% assigned ratings 1 to 3, federal states: 51%, municipalities: 56%).

- 46% of all respondents state that their municipality is more committed to improving the cycling situation than it was a few years ago.

65% of respondents think that politicians should spend more money on cycle paths than they have so far. Around one in two (51%) would like to see state subsidies for pedelecs / electric assisted bikes. There is no majority in favour of converting car lanes and parking spaces into cycle paths (29% in favour, 56% against).

The five most urgent demands of all respondents to politicians are as follows:

- Build more cycle paths (56 %)
- Separation of cyclists from car drivers (50 %)
- Install more protected lanes and cycle lanes (41 %)
- Secure bicycle parking facilities (41 %)
- Establish more bicycle streets (39 %)

Three out of four respondents (74%) rate their own employer as fundamentally bicycle-friendly and assign ratings between 1 and 3.

The top 3 wishes for employers are as follows:

- Financial subsidies for cycling (47% would like this)
- Involvement with the municipality for better cycle paths (41 %)
- Repair options for the bicycle (37 %)

Key findings (7/10)

Chapter “Bicycle market“

Cyclists primarily use conventional bikes such as city or urban bikes (45%), followed by mountain bikes (28%). Pedelects are currently used by 23% of cyclists and cargo bikes (non-electric or electric) by 3% of cyclists.

25% of all respondents are planning to buy a bike or pedelec in the next 12 months. The average willingness to spend is around 1,424 euros.

- The pedelec is a particularly popular choice: 48% of potential buyers say they want to buy a pedelec.
- 7% of potential buyers are planning to buy a cargo bike.

Key findings (8/10)

Chapter “Bike sharing, pedelecs and cargo bikes“

About every fifth respondent (21%) has used bike sharing at least once, 13% use it at least once a year.

Slightly less than half of those surveyed have ridden a pedelec before (45%). 18% currently have a pedelec in their household and use it themselves.

78% of all respondents are familiar with cargo bikes, but only 3% use them with or without electric assistance.

- 17% of all respondents could imagine buying a cargo bike.

Key findings (9/10)

Chapter “Cycling tourism“

Many people in Germany are generally open to a cycling holiday. For 36% of cyclists, a short holiday (one to three nights) and for 21% a longer cycling holiday (at least four nights) are generally considered as a form of holiday.

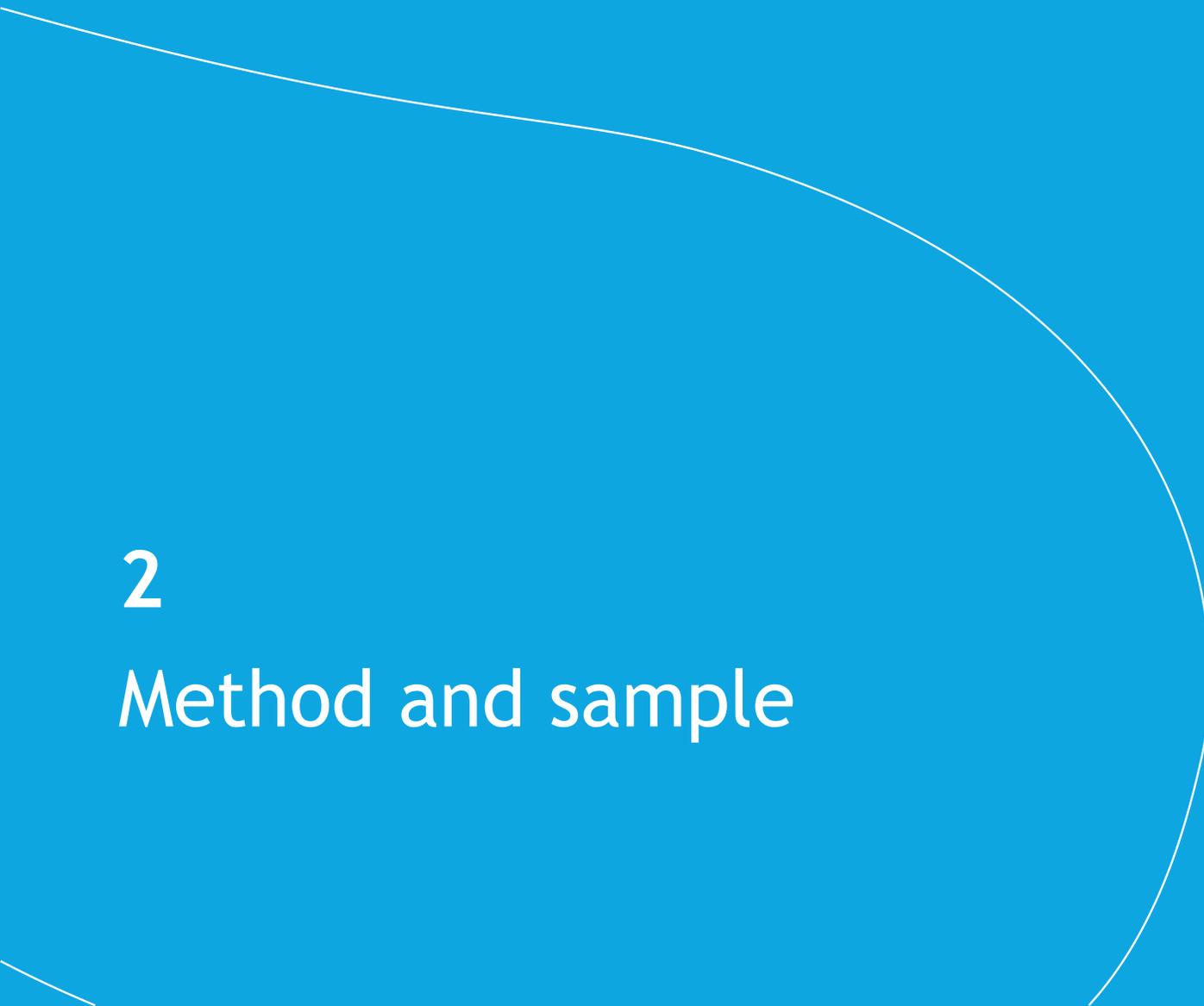
- Potential cycling holidaymakers are much more likely to stay (at least 1 night) in their home country, especially in their immediate vicinity, than abroad.

Key findings (10/10)

Chapter “Cycling in the city vs. in the countryside“

There are clear urban-rural differences in the regular (= daily + several times a week) use of transport:

- The bicycle/pedelec is used least frequently in rural areas (37% regular use). The proportion of regular cyclists is highest in large cities with more than 500,000 inhabitants (45%).
- 49% of people from medium-sized towns want to cycle more often in the future (vs. 46% in rural areas).
- Compared to cyclists from large cities, people from medium-sized towns and the countryside feel safer when cycling (large city: 56%, medium-sized town: 61%, countryside: 63%).
- Cyclists from large cities see increased danger in road traffic in the risk of car doors suddenly opening, the inconsiderate behavior of other cyclists and the insufficient width of the cycling infrastructure. Cyclists from small towns, on the other hand, increasingly identify the lack of (partial) cycle paths as a reason for their insecurity.



2

Method and sample

Methodical appendix



The survey was conducted by means of an online survey in an online access panel.

The survey was conducted using a fully structured online questionnaire.



The average length of the interview was 25 minutes.



The target persons for the survey were recruited in the age range 14-69 years, representative of the German-speaking resident population according to gender, age, education and location size (quota sample).



Survey period
12 May until 05 June 2023



n=4,003 interviews, of which with 3,253 people who cycle at least rarely (=cyclists)



Detailed information on the method can be found in the full report

3

Use of transport

Available means of transport

Frequency of use

Means of transport that have become more attractive

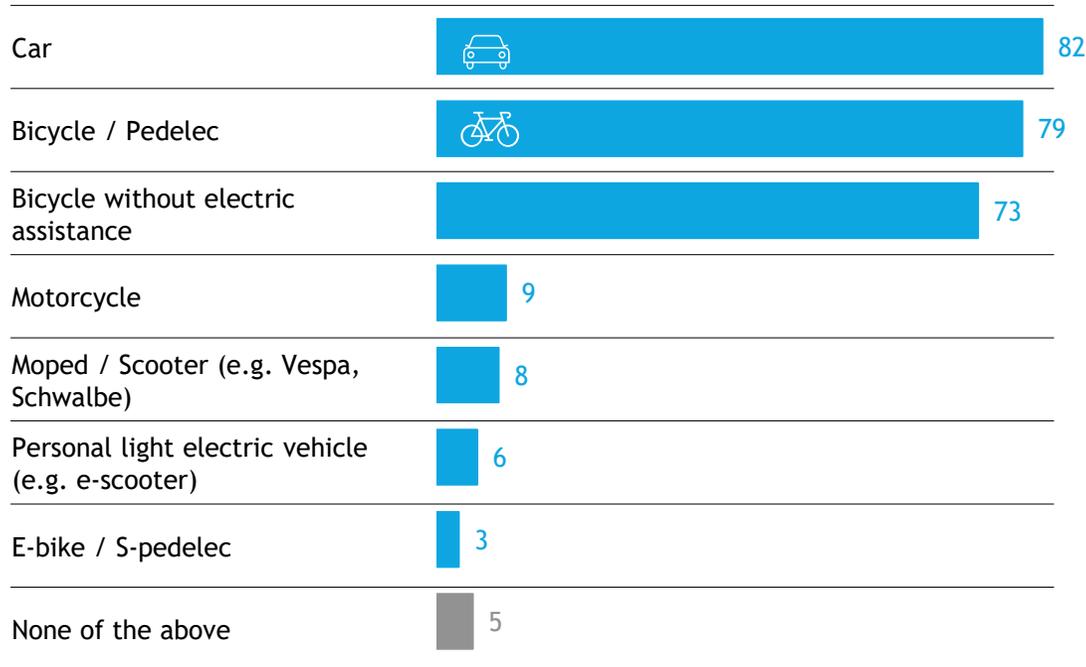
Identification as user of means of transport

Intended use

Available means of transport

Q11: What means of transport does your household have?

Means of transport in the household



Source: SINUS (2023)

N=4,003 cases, all respondents aged between 14 and 69 years

*N=3,288 cases, respondents whose household owns a car aged between 14 and 69 years

**N=2,936 cases, respondents whose household has a bicycle aged between 14 and 69 years

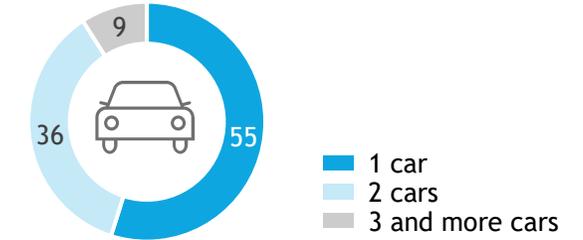
Data in %

Q12: How many cars are there in your household?

Q13: How many bicycles without electric assistance are in your household?

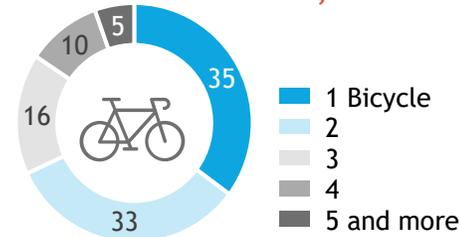
Q14: And how many of them do you drive yourself?

Cars in household $\bar{x}=1.59^*$

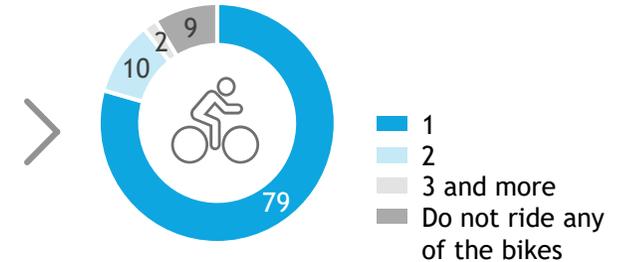


Bicycles without electric assistance

$\bar{x}=2,2^{**}$



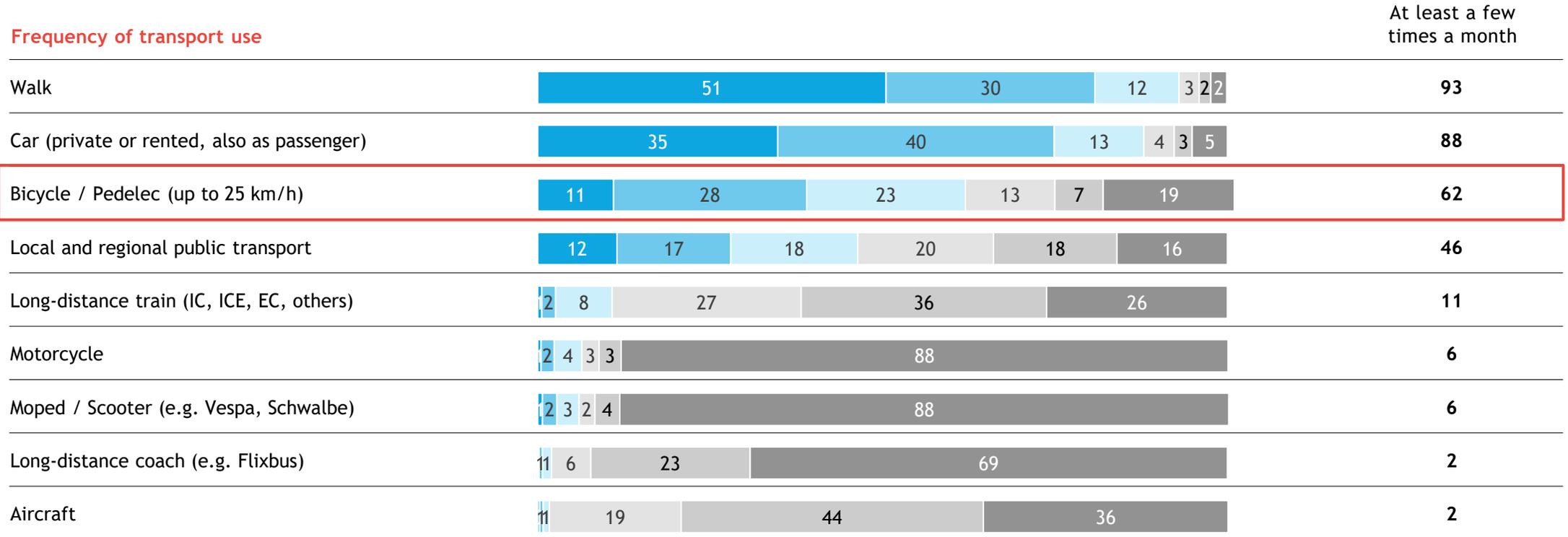
Self-used bicycles $\bar{x}=1.1^{**}$



Frequency of use of means of transport

Bicycle compared to other means of transport

Q19: How often do you move around by the following means of transport?



Source: SINUS (2023)
 N=4,003 cases, all respondents aged between 14 and 69 years
 Data in %.

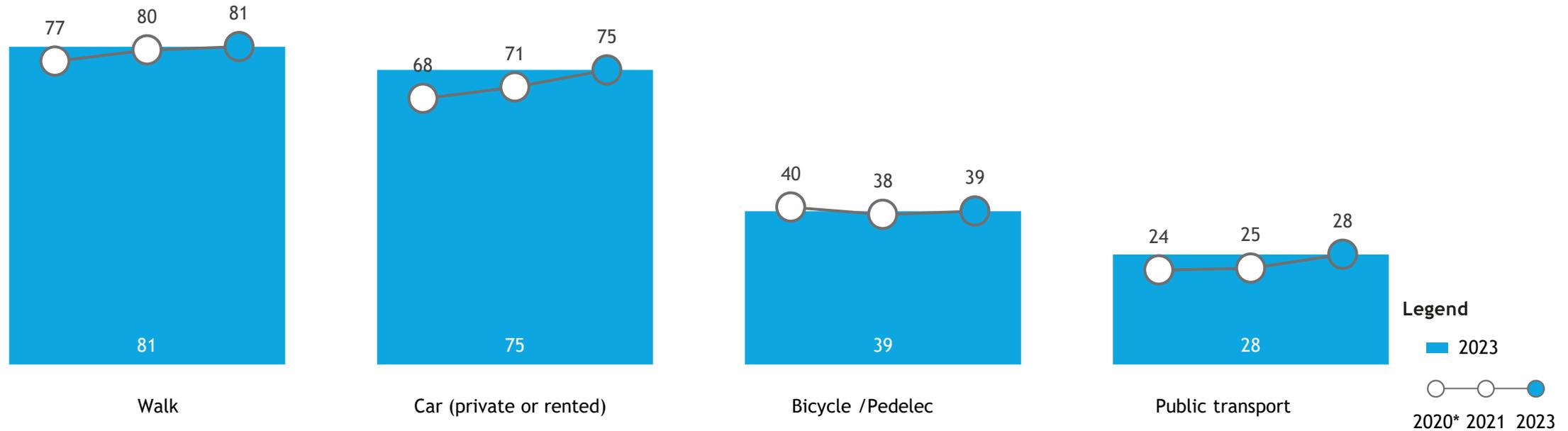
■ Daily
■ Several times a week
■ A few times a month
■ A few times a year
■ Rarer
■ Never

Frequency of use of means of transport

Time comparison study 2020* - 2021 - 2023

Q19: How often do you move around by the following means of transport?

Regular use (Daily / Several times a week)



Source: SINUS (2023)
 N=4,003 cases, all respondents aged between 14 and 69 years
 2021: N=3,107; all respondents aged between 14 and 69 years
 2020: N=3,039 cases, all respondents aged between 14 and 69 years Data in %; *Corona-related out-of-turn survey in June 2020
 Data in %

Type of bicycle use

Bicycle and pedelec as a means of transport and leisure activity

Q19: How often do you move around by the following means of transport?

Frequency of transport use

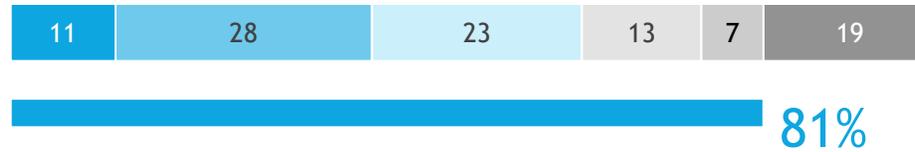


Leisure



Everyday traffic

Total (bicycle/pedelec)

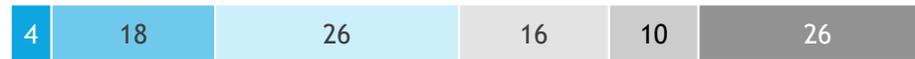


81% of the respondents move around at least rarely by bicycle or pedelec. In the following, these are referred to as cyclists.

Bicycle as a means of everyday transport



Bicycle as a leisure activity



Pedelec as a means of transport



Pedelec as a leisure activity



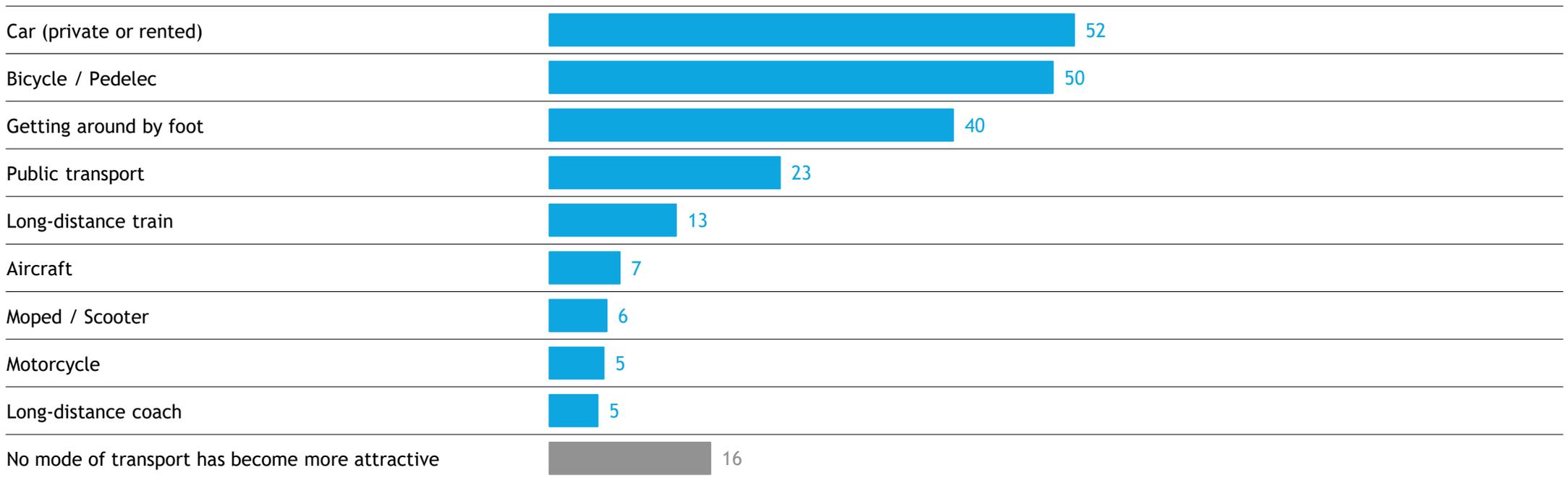
Source: SINUS Institute (2023)
 N=4,003 cases, all respondents aged between 14 and 69 years
 Data in %



Means of transport that have become more attractive recently

Q21: Things have changed in recent years, for example due to the Corona pandemic and rising inflation rates. When you think back to the last few years in general, which modes of transport do you feel have become more attractive to you? (multiple choice)

Means of transport



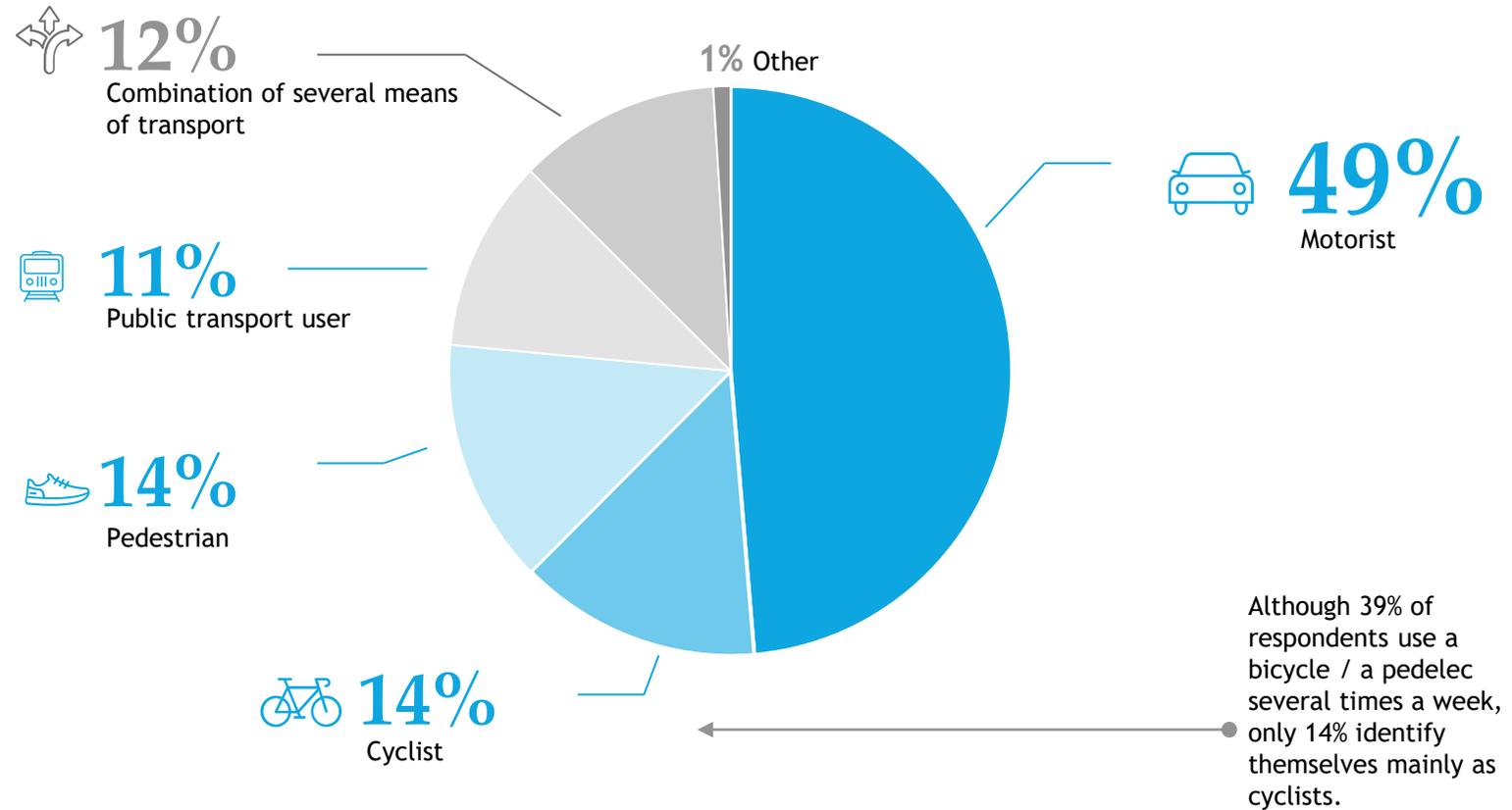
Source: SINUS (2023)

N=4,003 cases, all respondents aged between 14 and 69 years

Data in %.

Identification as a user of a means of transport

Q22: I see myself most as...?



Source: SINUS (2023)
N=4,003 cases, all respondents aged between 14 and 69 years
Data in %

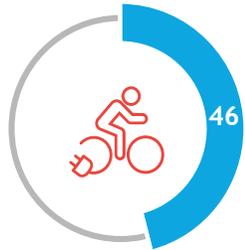
Intended use of means of transport

TOP 10 means of transport

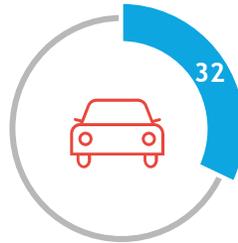
Q54: Which of these means of transport would you like to use more often in the future? (multiple answers)

Desire for more frequent use

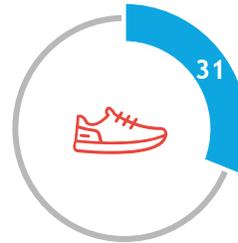
1. bicycle/ pedelec



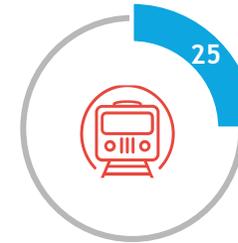
2. car



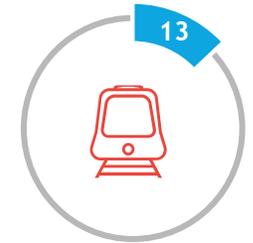
3. by foot



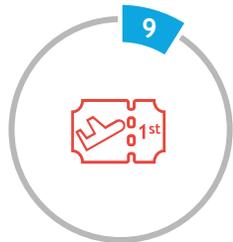
4. public transport



5. long-distance train



6. aircraft



7. personal light electric vehicle (e.g. e-scooter)



8. motorbike



9. moped / scooter



10. long-distance coach



Source: SINUS (2023)
 N=4,003 cases, all respondents aged between 14 and 69 years
 Data in %

4

Cycling occasions

Distance travelled

Occasions of use

Cycling to work / education

Reasons against bicycle use to work

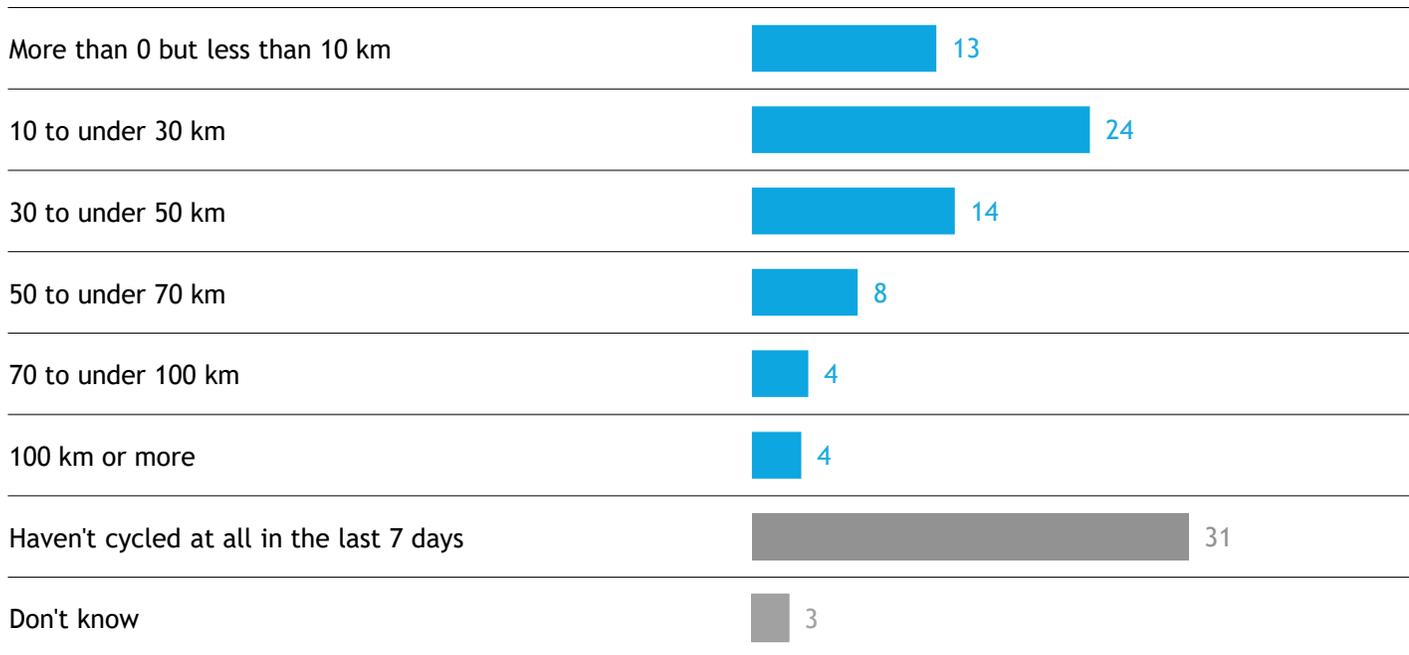
Taking bikes on public transport

Cycling children

Distance travelled by bicycle

Q32: Approximately how many kilometres have you cycled in the last 7 days?

Distance travelled in the last seven days



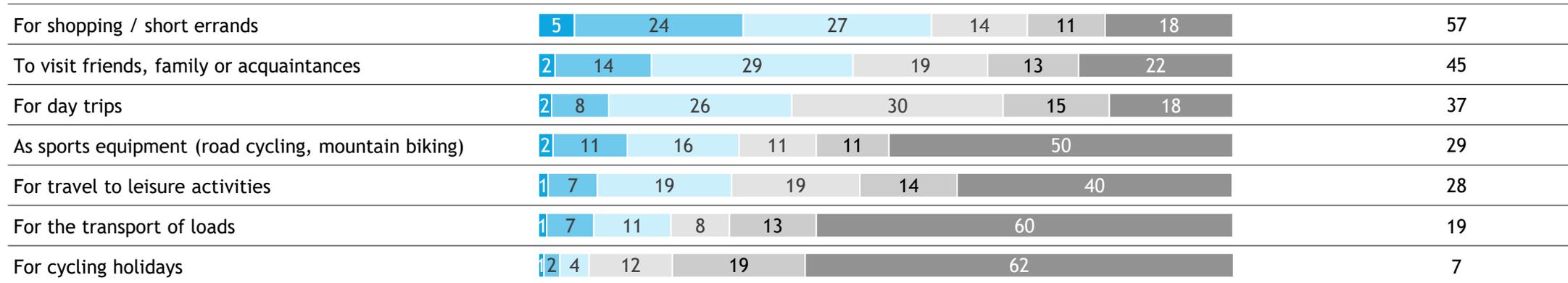
Source: SINUS (2023)
 N=3,253 cases, cyclists between 14 and 69 years of age
 Data in %

Reason for bicycle use

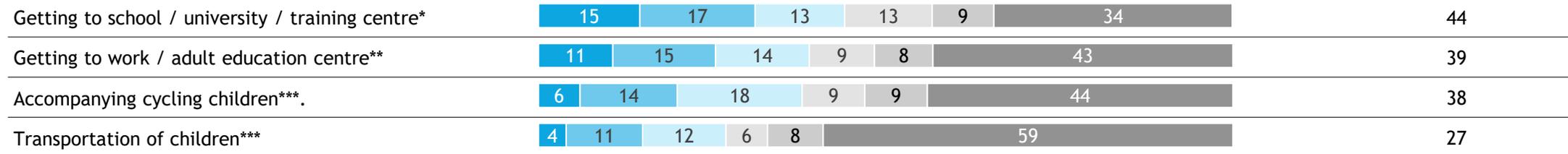
Q30: How often do you use the bicycle on the following occasions?

Usage occasions of all cyclists

At least a few times a month



Occasions for use by specific groups of people



Source: SINUS (2023)

N=3,253 cases, only cyclists between 14 and 69 years old

*Base: N=323, cyclists who are in education aged between 14 and 69 years

**Base: N=2,210, cyclists who are employed aged between 14 and 69 years.

***Base: N=844, cyclists with children under 16 in the household

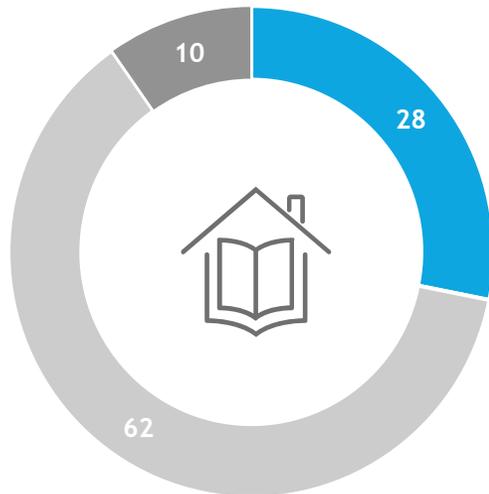
Data in %



Bicycle use to work / education

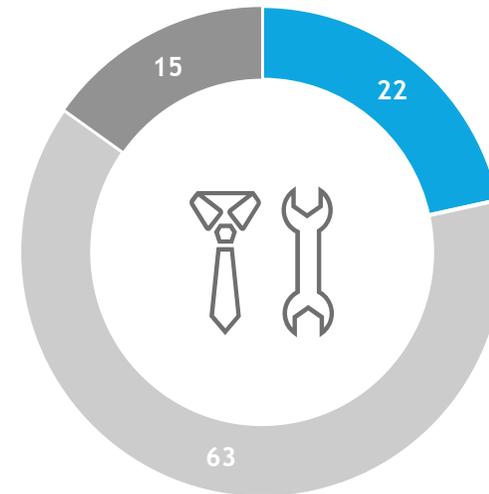
Q30: How often do you use the bicycle on the following occasions?

Way to the educational institution*



Q30: How often do you use the bicycle on the following occasions?

Way to the workplace**



Source: SINUS (2023)

*N=358 cases, all in education between 14 and 69 years of age

**N=2,606 cases, all employed persons between 14 and 69 years of age

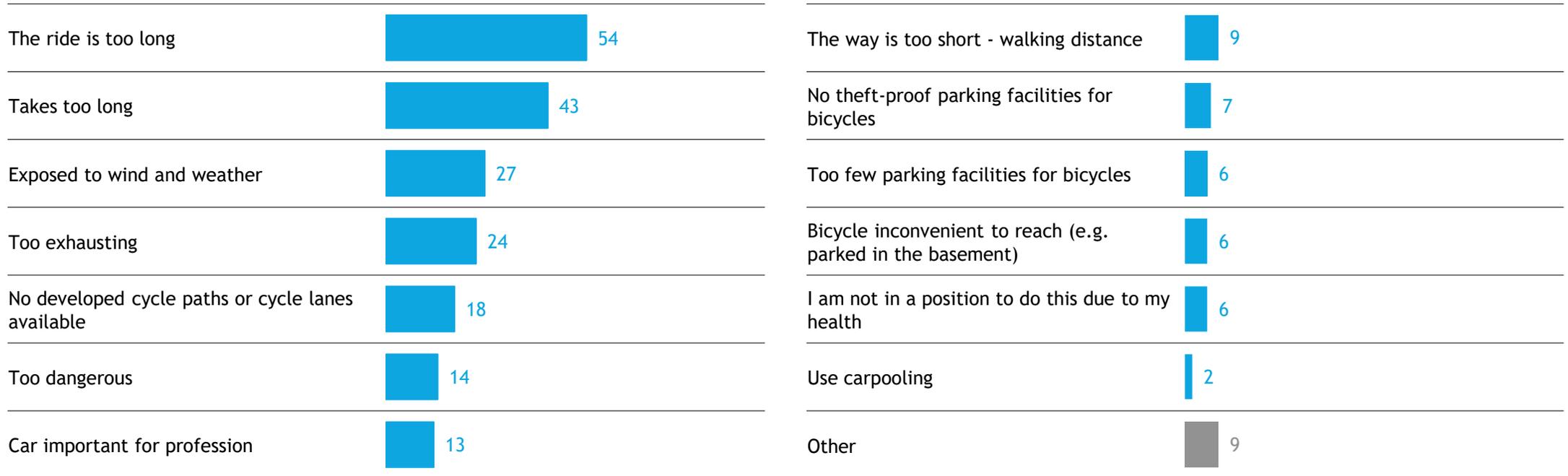
Data in %.

- Use the bike regularly for commuting
- Ride a bike but do not use it / commute irregularly
- Never ride a bike

Reasons against using a bicycle to work / education

Q53: Which of the following reasons causes you to not / rarely cycle to school / university / training centre / work? (multiple answer)

Reasons against cycling to the place of work / training location



Source: SINUS (2023)

N=1,280 cases, only cyclists who never cycle to work / education or do so less than a few times a year

Data in %

Taking bikes on public transport

Q37: How important do you think is it to be able to take your bike with you on the following modes of transport? Q64: How would you rate the ability to carry bicycles in the following options in your area of residence?

Relevance of bicycle transport

(Very) important

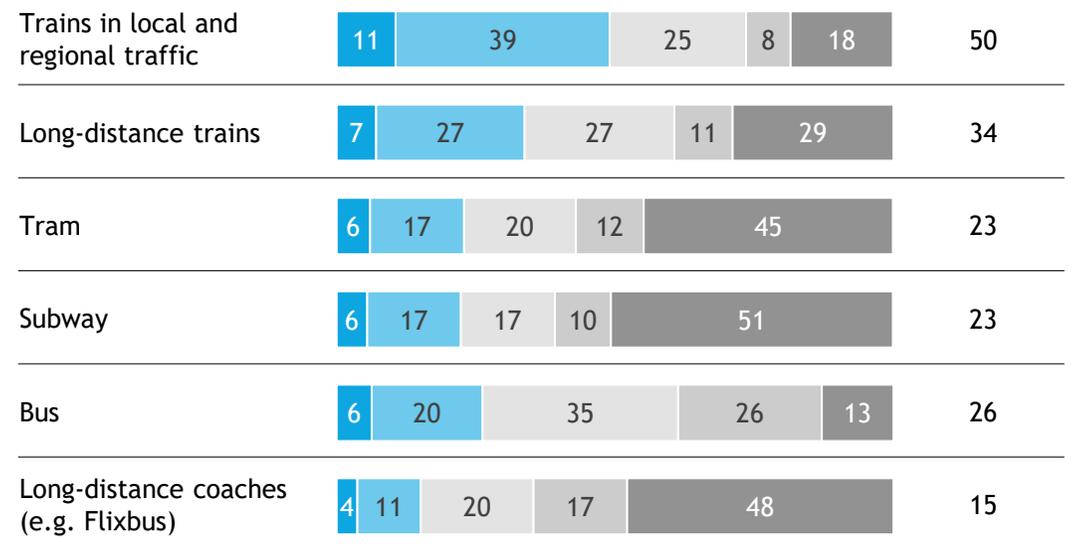


Very important
Important

Less important
Not important
Means of transport on site not available / I cannot say

Evaluation of possibilities

(Rather) positive



Positive
Rather positive

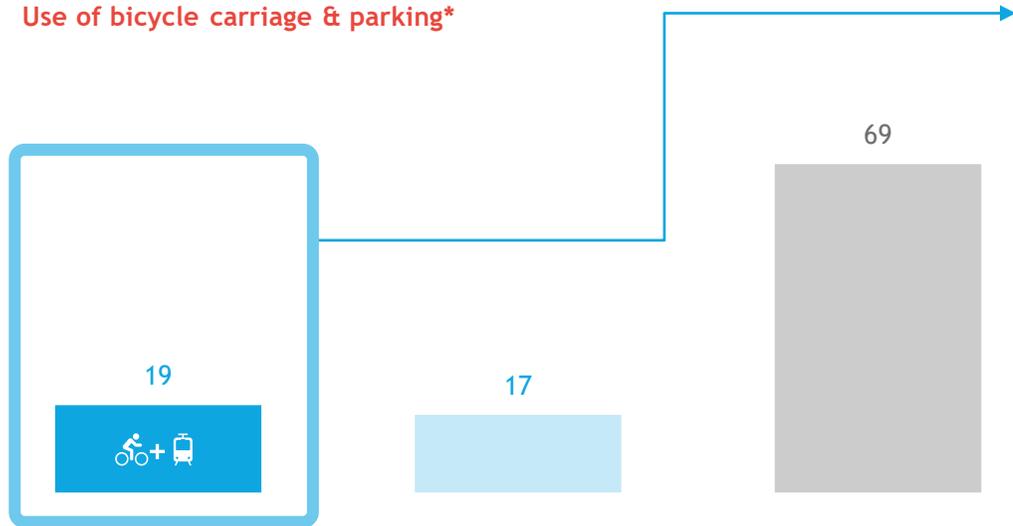
Rather negative
Negative
Means of transport on site not available / I cannot say

Source: SINUS (2023)
N=3,253 cases, cyclists aged between 14 and 69 years
Data in %.

Combination of bicycle and public transport

Q38: Do you combine cycling with public transport (e.g. train / bus / tram / subway)?

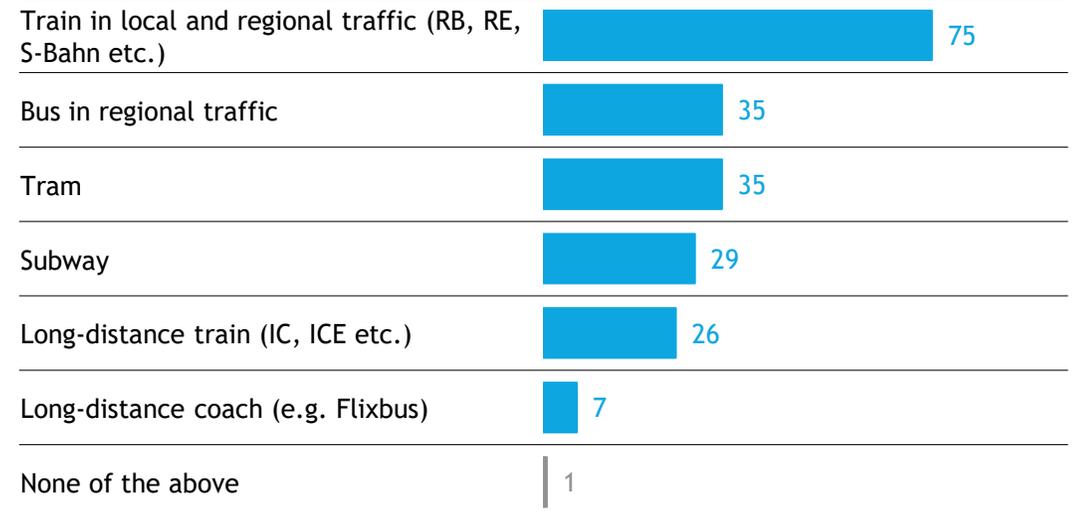
Use of bicycle carriage & parking*



- Yes, I take the bicycle with me on public transport (bicycle carriage).
- Yes, I park the bicycle at the station / stop.
- Neither. I don't take the bicycle on public transport and I don't leave it at the station.

Q39: You have stated that you take your bicycle with you on public transport. In which means of transport do you take your bicycle? (multiple answer)

Use of bicycle transport with ...**



Source: SINUS (2023)

*N=3,253 cases, cyclists aged between 14 and 69 years

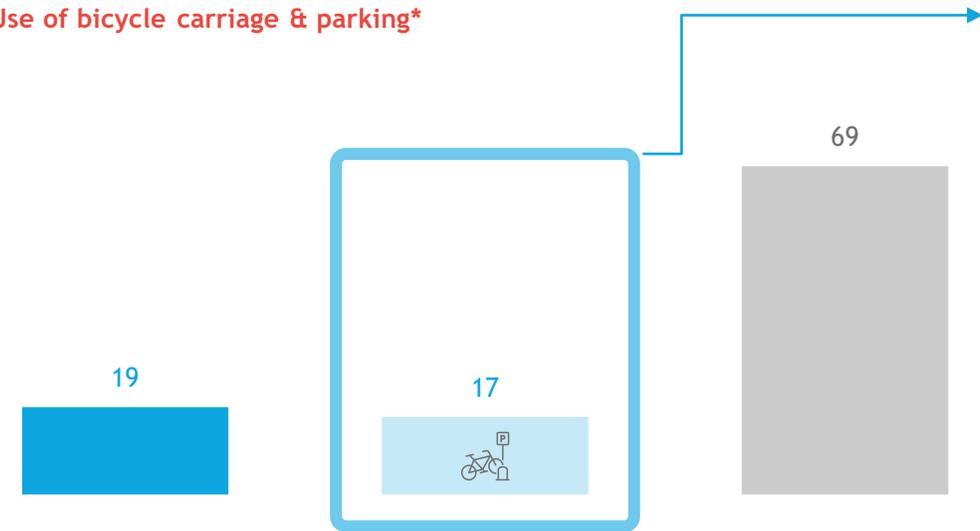
**N=619 cases, only cyclists who take their bike with them on public transport

Data in %

Combination of bicycle and public transport

Q38: Do you combine cycling with public transport (e.g. train / bus / tram / subway)?

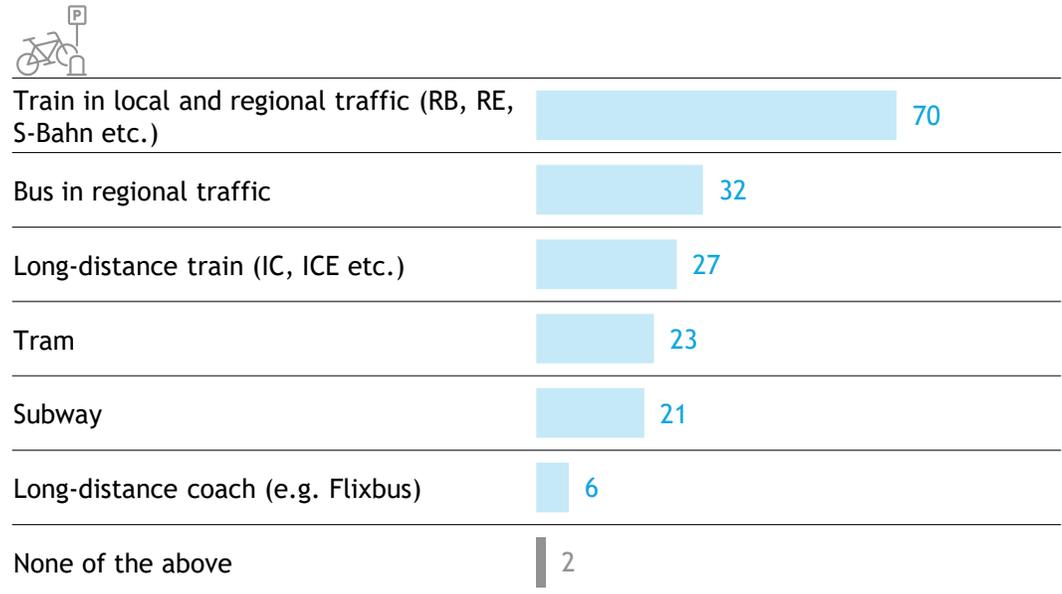
Use of bicycle carriage & parking*



- Yes, I take the bicycle with me on public transport (bicycle carriage).
- Yes, I park the bicycle at the station / stop.
- Neither. I don't take the bicycle on public transport and I don't leave it at the station.

Q40: You have indicated that you park the bicycle at the station / stop. For which means of transport do you use the parking facilities? (multiple answer)

Use of parking facilities at ...**



Source: SINUS (2023)

*N=3,253 cases, cyclists aged between 14 and 69 years

**N=545 cases, only cyclists who park their bike at the station / stop

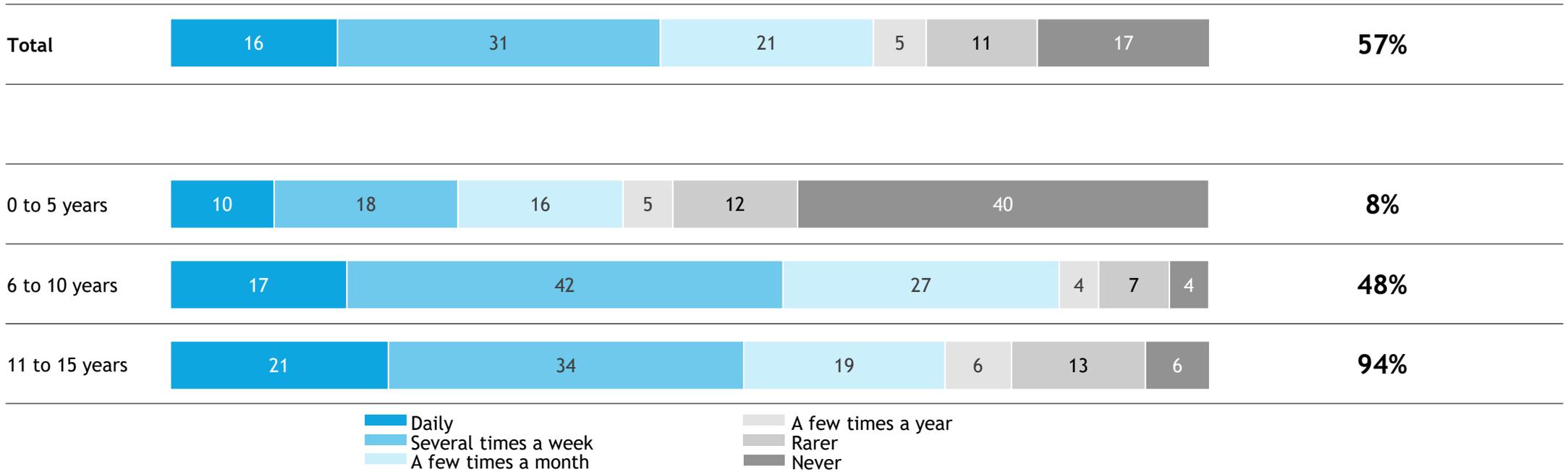
Data in %

Bicycle use of own children

Q27: How often does your child [...] ride a bicycle? Q29: Do you let your child [...] ride a bicycle alone, i.e. unaccompanied?

Frequency of bicycle use by child age

Share, children ride unaccompanied*



Source: SINUS (2023)
 N=1,394 cases, respondents with children under 16 years of age
 *N=1,163 cases, respondents whose children ride bicycles
 Data in %

5

Reasons against cycling

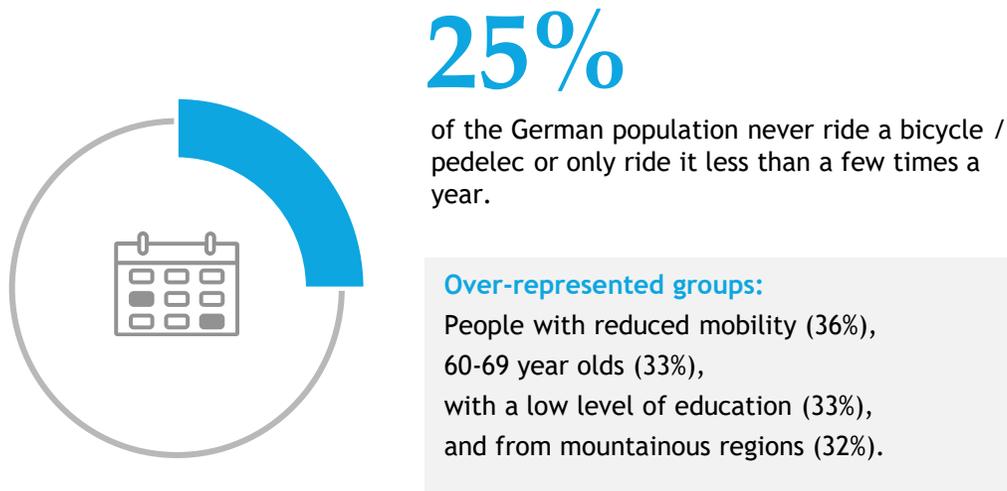
Reasons against cycling

Proportion of non/rare and recreational cyclists

Overview: Non / rare cyclists and recreational cyclists

Q19: How often do you move around by the following means of transport?

Frequency of bicycle / pedelec use



Source: SINUS Institute (2023)

N=4,003 cases, all respondents aged between 14 and 69 years

Data in %

Reasons for infrequent or no bicycle use

Q56: Why do you never or rarely cycle?

Top 10 reasons for rare / no bicycle use

I agree

I don't like being exposed to the weather	36	34	70
I need to transport things regularly and prefer to do so by car	36	32	68
My regular routes are too far / take too long by bike	43	24	67
On a bike I feel at the mercy of other road users	32	33	65
I find cycling too strenuous	25	37	62
I don't enjoy cycling	29	28	57
The risk of being involved in an accident while cycling is too great for me	25	32	56
There is not much cycling in my social environment	24	30	54
I am a routine person and use other means of transport / change not considered.	24	28	52
The roads and paths in my area are not developed well enough for cycling.	23	27	50

Other reasons for rare / no bicycle use

I agree

Buying a bike and repairs are too expensive for me	22	27	50
I find parking the bike too inconvenient (e.g. in the cellar).	22	26	48
It bothers me that I sweat when I cycle	21	25	46
Buying a bike and repairs are too inconvenient for me	16	27	43
I am physically impaired - this restricts me from using a bicycle	26	16	42
The area where I live is too mountainous/hilly for me to ride a bike	20	22	42
I lack practice in cycling / I do not have a safe riding style.	17	20	37
In my childhood / youth , cycling hardly played any role / played no role at all.	10	15	25
In my social environment, cycling has a bad reputation	3	8	11
I can't ride a bike .	5	5	11

Source: SINUS (2023)

N=1,016 cases, people who never/ rarely use the bicycle

Data in %

 I fully agree
 I rather agree

6 Safety

Statements on the cycling situation on site

Feeling of safety

Reasons for feeling unsafe

Bicycle helmet use

Path / crossing types and perceived safety

Statements on the cycling situation

Q65: Below we show you some statements about cycling in your municipality / city. Please rate to what extent the following statements apply to you.

Agreement with the statement	Total*					Ident. as a car driver	Ident. as a cyclist	
Many cyclists are a factor of insecurity in road traffic due to their driving behaviour.	22	38	24	7	10	60	62	53
I enjoy cycling in my municipality / city	11	41	24	14	9	53	49	72
There is enough space for bicycles in my city / municipality, the paths are wide enough.	9	36	33	15	7	45	47	49
The cycling infrastructure in my municipality / city is family-friendly	7	35	33	14	11	42	42	48
The cycle paths are regularly cleaned / cleared in our area	8	33	26	14	19	41	39	49
In my city / municipality, road users show consideration for each other	6	35	34	17	8	40	43	44
The municipality /city monitors that cars do not park on cycle paths	9	26	26	18	23	34	37	34
In my city / municipality, the traffic lights are switched in such a way that I can move quickly as a cyclist.	7	24	27	17	25	31	29	39

Source: SINUS (2023)

N=4,003 cases, all respondents aged between 14 and 69 years

*Top 2

Data in %

■ I fully agree
■ I rather agree

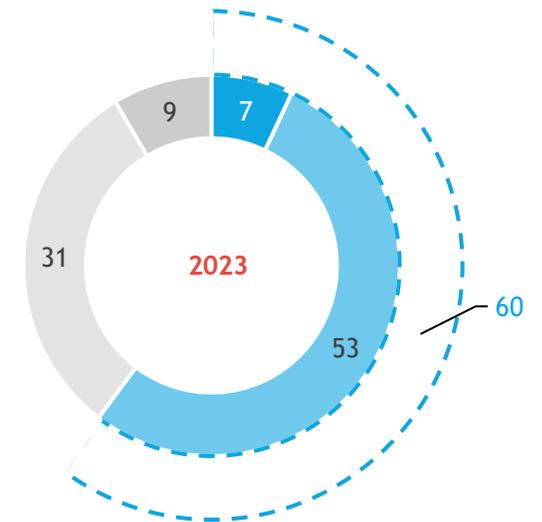
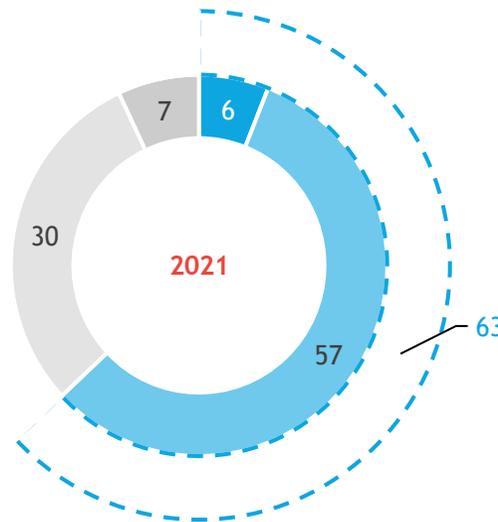
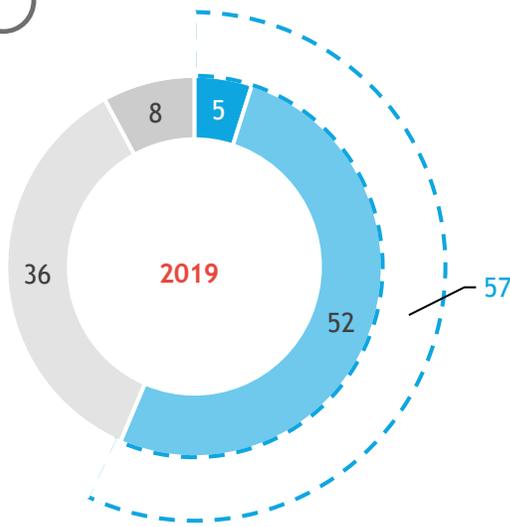
■ I rather don't agree
■ I don't agree at all
■ I do not know

■ Strongly above average
■ Strongly below average

Feeling of safety when cycling in road traffic

Time comparison study 2019 - 2021 - 2023

Q67: Do you feel safe when cycling in road traffic?

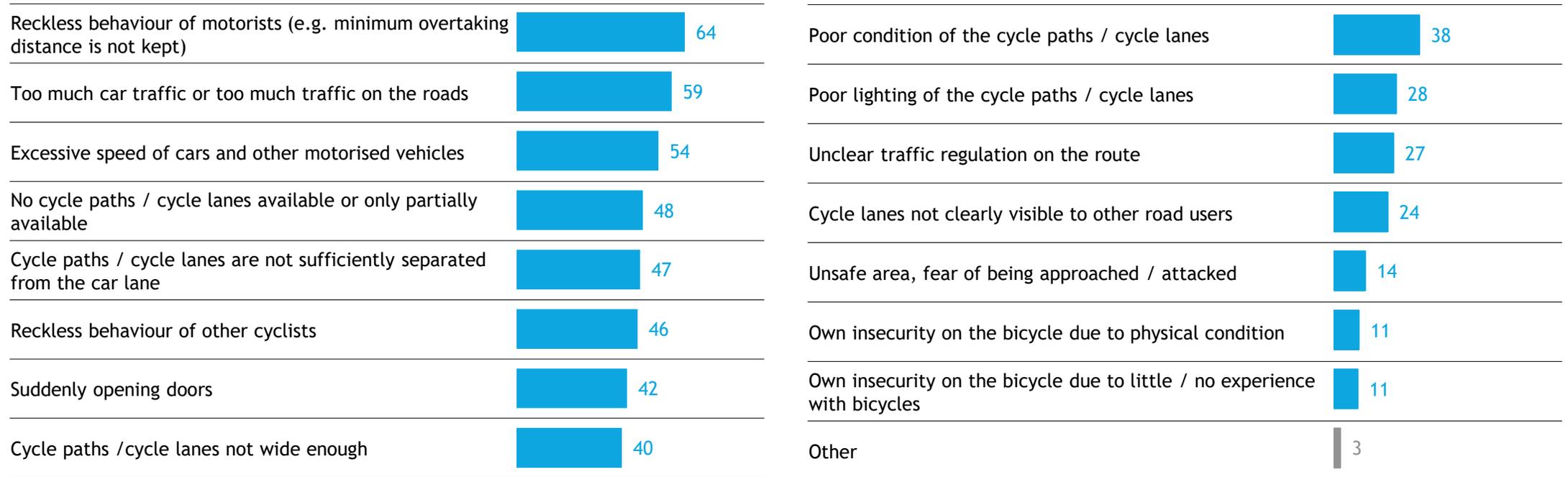


--- Yes
■ Yes, very
■ Yes, mostly
■ Rather not
■ Not at all

Source: SINUS (2023)
 2023: N=3,253 cases, cyclists aged between 14 and 69 years
 2021: N=2,397 cases, cyclists aged between 14 and 69 years
 2019: N=2,376 cases, cyclists aged between 14 and 69 years
 Data in %

Reasons for feeling unsafe when cycling

Q69: Why do you (tend to) feel insecure? (multiple answer)



Source: SINUS (2023)

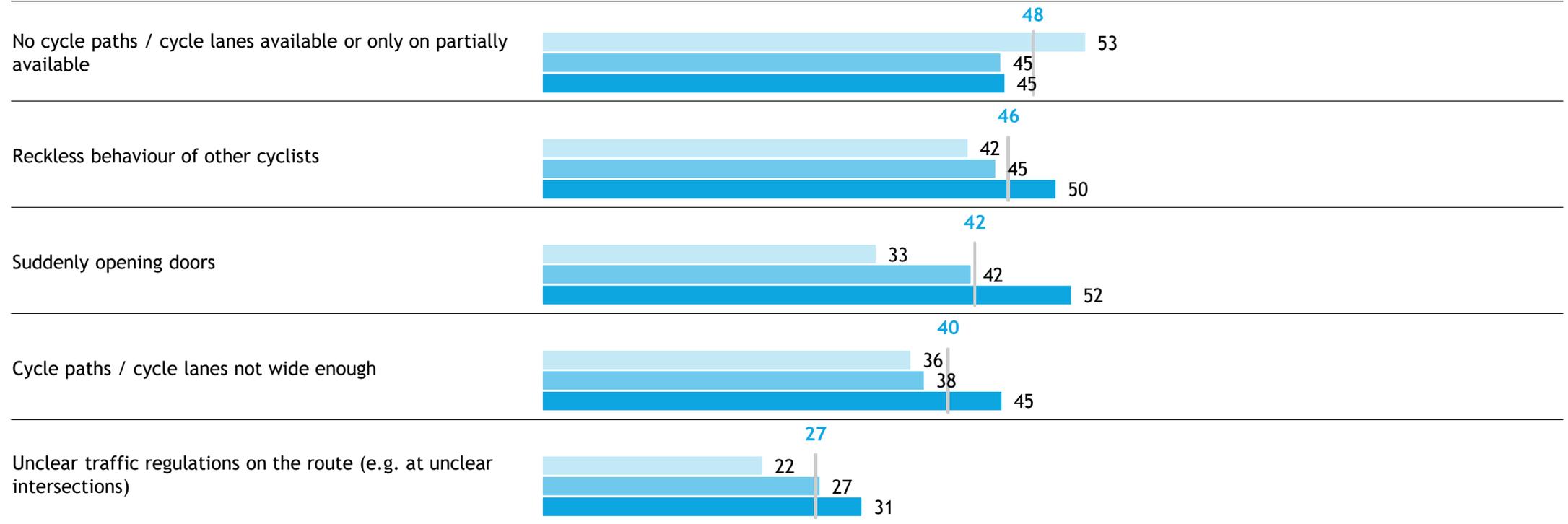
N=1,288 cases, only cyclists who feel (rather) unsafe in road traffic

Data in %

Reasons for feeling unsafe when cycling

Selected statements according to location size

Q69: Why do you (tend to) feel insecure? (multiple answer)



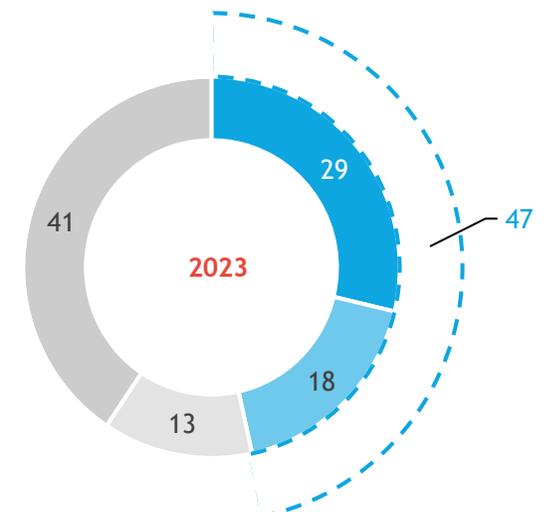
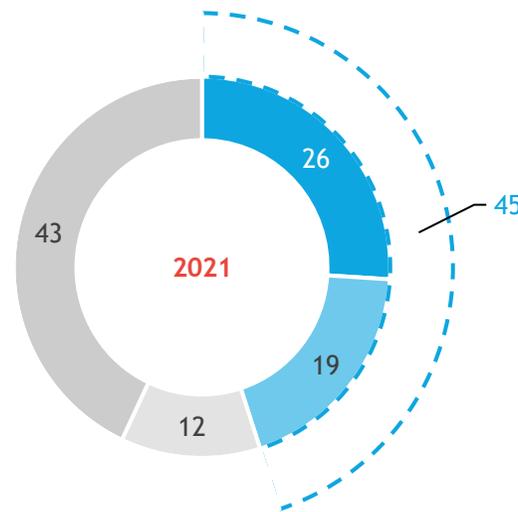
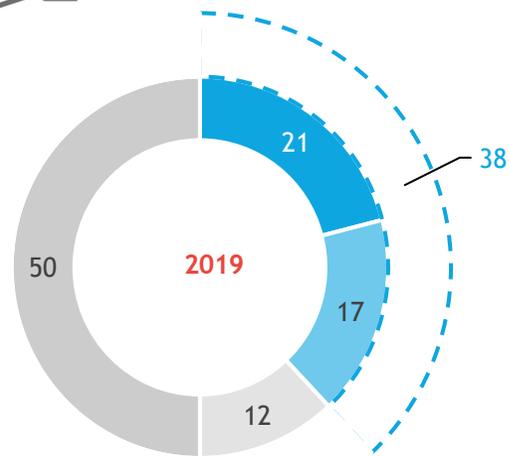
Source: SINUS (2023)
 N=1,288 cases, cyclists who feel unsafe in road traffic
 Data in %



Bicycle helmet use

Time comparison study 2019 - 2021 - 2023

Q76: How often do you wear a bicycle helmet?



Source: SINUS (2023)
 N=3,253 cases, cyclists aged between 14 and 69 years
 2021: N=2,376 cases, cyclists aged between 14 and 69 years
 2019: N=2,397; cyclists aged between 14 and 69 years
 Data in %

Subjective safety on path types

Proportion of those who would feel very / rather safe on the corresponding path types

Q71: In the following, we show you different types of paths for bicycle traffic (incl. example pictures). Please indicate how safe you would feel cycling on each type of path. → Very / rather safe



94%

Developed cycle path on the pavement (separated from pedestrians)



93%

Agricultural roads / field paths



93%

Protected cycle lane



83%

Cycle streets



77%

Pop-up bike lane



76%

Cycle lane without colour, with solid line



71%

Cycle lane marked in colour + solid line



49%

Protective strip + broken line



43%

Joint footpath and cycle path



29%

Special bus lane



21%

Road with speed limit 30 and mixed traffic



13%

Road with speed limit 50 and mixed traffic

Source: SINUS (2023)

N=4,003 cases, all respondents aged between 14 and 69 years

Data in %

Subjective safety on intersections and roundabouts

Proportion of those who would feel very / rather safe on the corresponding intersections and roundabouts

Q73: In the following, we show you different design elements for bicycle traffic at intersections and roundabouts (incl. example pictures). Please indicate in each case how safe you would feel as a cyclist at such an intersection or roundabout.



75%

Cycle lane in front of traffic lights secured with bollards



60%

Structural cycle path up to the traffic lights without swivelling onto the road



60%

Separate signalling (separate traffic light phases for cars and cyclists)



56%

Protected intersections



49%

Roundabout with surrounding cycle path



48%

Bicycle turnout / cycle lane in central position



47%

Red marked fords



39%

Widening of the cycle lane in front of the traffic lights



35%

Cycle path leading onto the road before the traffic lights



15%

Crossing the intersection in mixed traffic without separate cycling guidance*



15%

Roundabout with mixed traffic

Source: SINUS (2023)

N=4,003 cases, all respondents aged between 14 and 69 years.

*No distinction was made between speed 50 and speed 30 at this intersection - in the picture it is presumably a speed 50 intersection;

Data in %

7

Cycling infrastructure

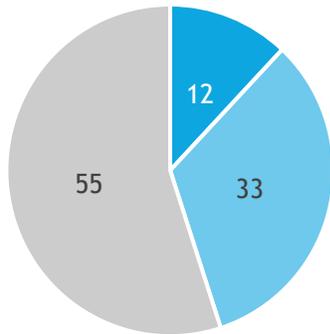
Use and evaluation of protected cycle lanes

Use of bicycle streets and their advantages

Protected bike lanes

Q105: Have you ever heard of "protected bike lanes"?

Familiarity & Use



- Yes, I have already used it
- Yes, but I have not used it yet
- No

Source: SINUS (2023)

N=4,003 cases, all respondents aged between 14 and 69 years.

*N=489 cases, people who have already used protected bike lanes

Data in %

Q106: The picture shows a "protected bike lane" in Berlin. What is your general opinion on the idea of "protected bike lanes"?



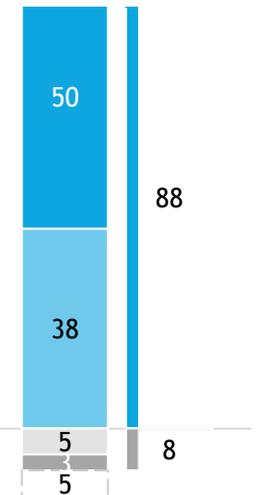
Evaluation

Positive

- I rate it consistently positive
- I rate it rather positively

Negative

- I rate it rather negatively
- I rate it consistently negative
- Don't know



Rating from people who have already used protected bike lanes*.

Positive: 93%

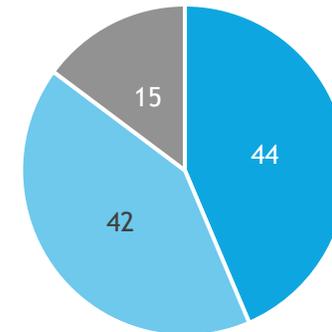
Negative: 6%

Bicycle streets



F107. Have you ever used a "bicycle street"?

Familiarity & Use



- Yes, I have used it
- No, but I have heard of it before
- No, I never heard the term before

Source: SINUS (2023)

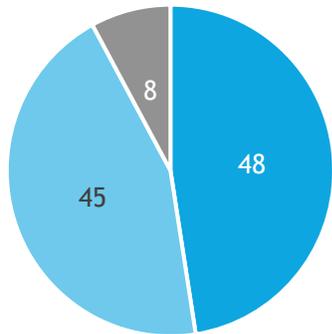
N=4,003 cases, all respondents aged between 14 and 69 years

Data in %.

Advantages of bicycle streets

F108: Do you prefer the bicycle street to other cycle paths?

Preference over other cycle paths*



- Yes
- Equivalent to other cycle paths
- No

Source: SINUS (2023)

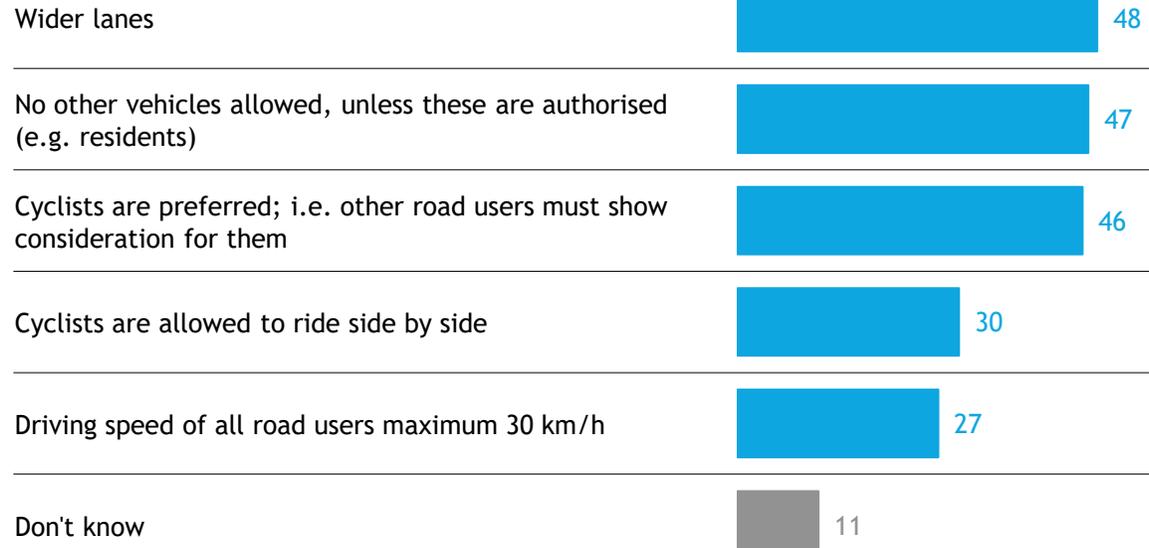
*N=1,617 cases, cyclists who have already used a bicycle street

**N=2,856 cases, cyclists who have already heard of a bicycle street

Data in %

F109: Special regulations apply on bicycle streets. In your opinion, which characteristics of bicycle streets are the most advantageous compared to conventional roads with cycle traffic guidance?
You can select up to three characteristics. (Multiple choice)

Perceived advantages**



8

Cycling-friendliness of politics & employers

Assessment of the bicycle-friendliness of different political levels

Wishes for policymakers

Statements on the transformation of transport & mobility

Evaluation and wishes for employers / training institutions

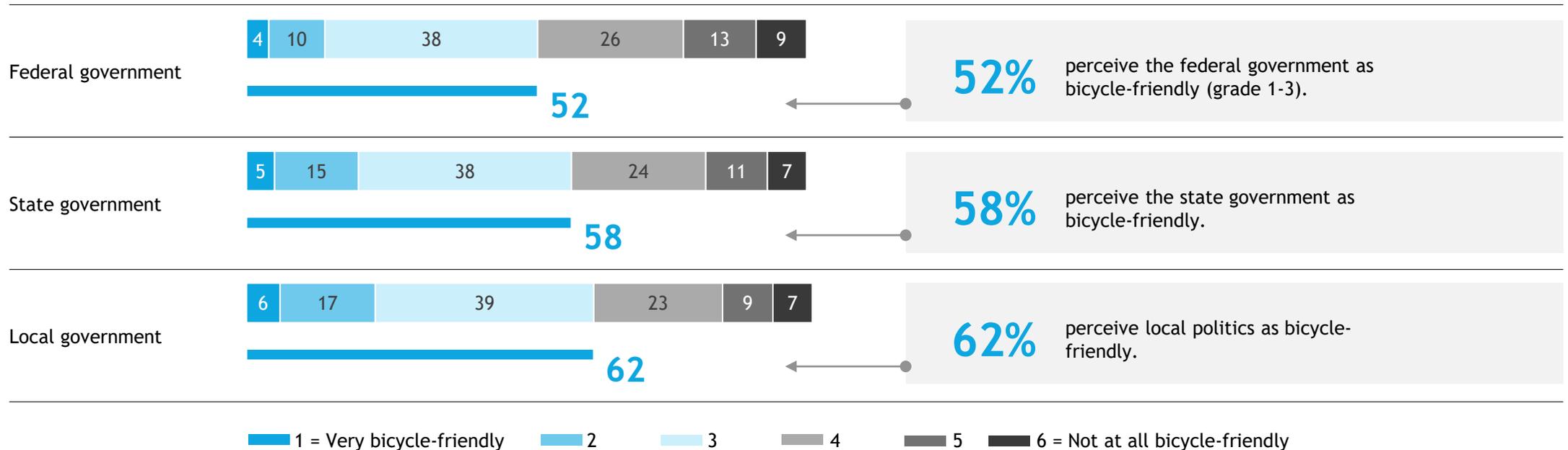
Bicycle-friendliness of different political levels

Q59: Would you generally classify the federal government as bicycle-friendly? Rating on a scale from 1 to 6 (1 = very bicycle-friendly, 6 = not at all bicycle-friendly).

Q60: Would you generally classify your state government as bicycle-friendly?

Q61: Would you generally classify your local government as bicycle-friendly?

Assessment of different policy levels



Source: SINUS (2023)

N=4,003 cases, all respondents aged between 14 and 69 years

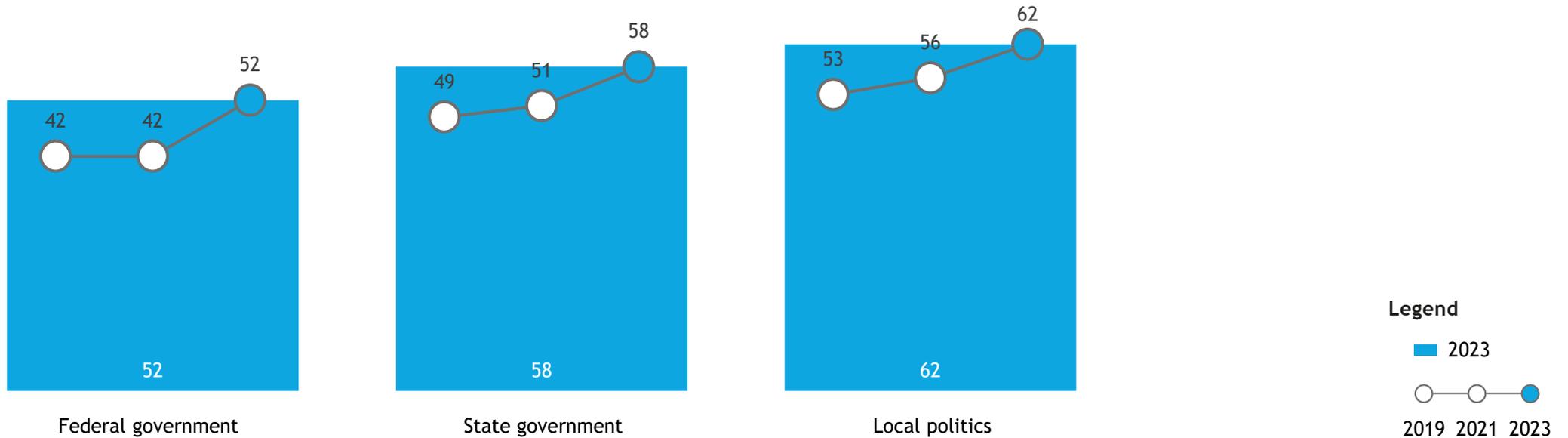
Data in %

Bicycle-friendliness of different political levels

Time comparison study 2019 - 2021 - 2023

Q59: Would you generally classify the federal government as bicycle-friendly? Rating on a scale from 1 to 6 (1 = very bicycle-friendly, 6 = not at all bicycle-friendly).
 Q60: Would you generally classify your state government as bicycle-friendly?
 Q61: Would you generally classify your local government as bicycle-friendly?

Positive assessment of different political levels (grade 1-3)

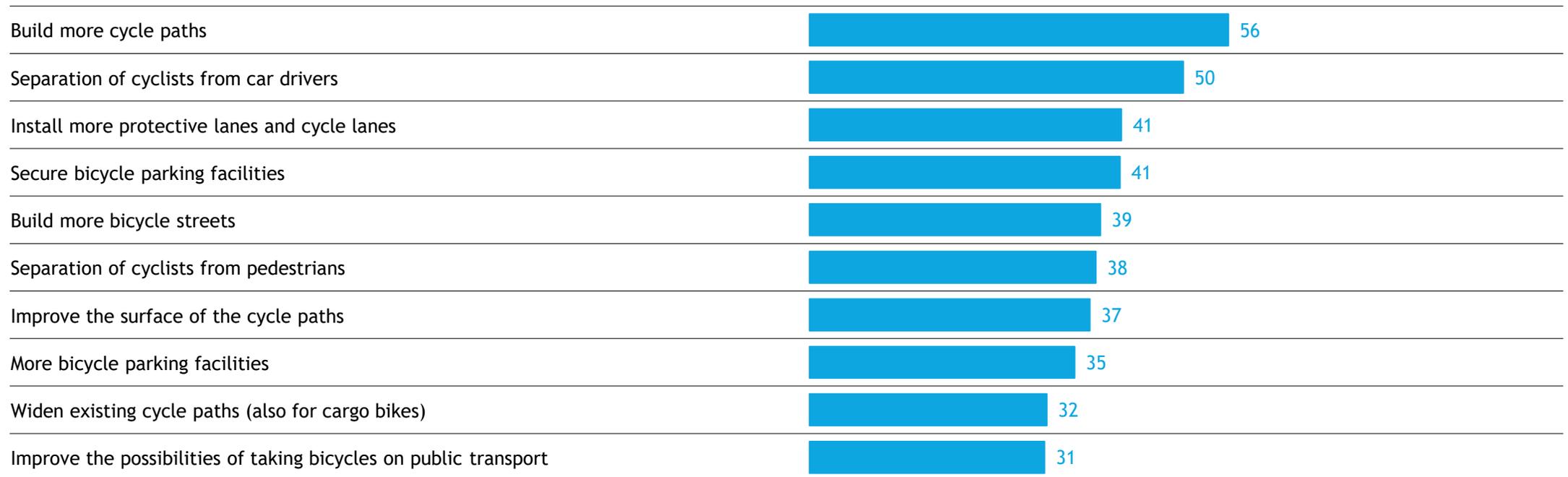


Source: SINUS (2023)
 N=4,003 cases, all respondents aged between 14 and 69 years
 2021: N=3,107; all respondents aged between 14 and 69 years
 2019: N=3,053 cases, all respondents aged between 14 and 69 years
 Data in %

Wishes for policymakers (1/2)

Q58: In your opinion, in what areas do you think federal, state and local politicians could do more for cycling? (multiple answer)

Top 10 wishes



Source: SINUS (2023)

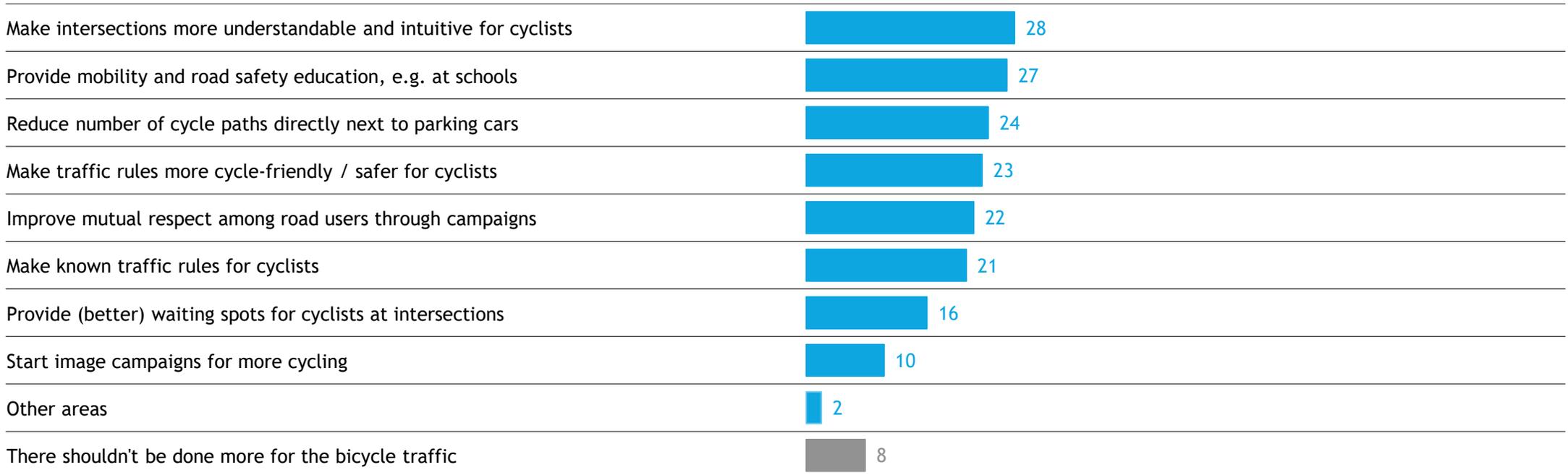
N=4,003 cases, all respondents aged between 14 and 69 years

Data in %

Wishes for policymakers (2/2)

Q58: In your opinion, in what areas do you think federal, state and local politicians could do more for cycling? (multiple answer)

Further wishes



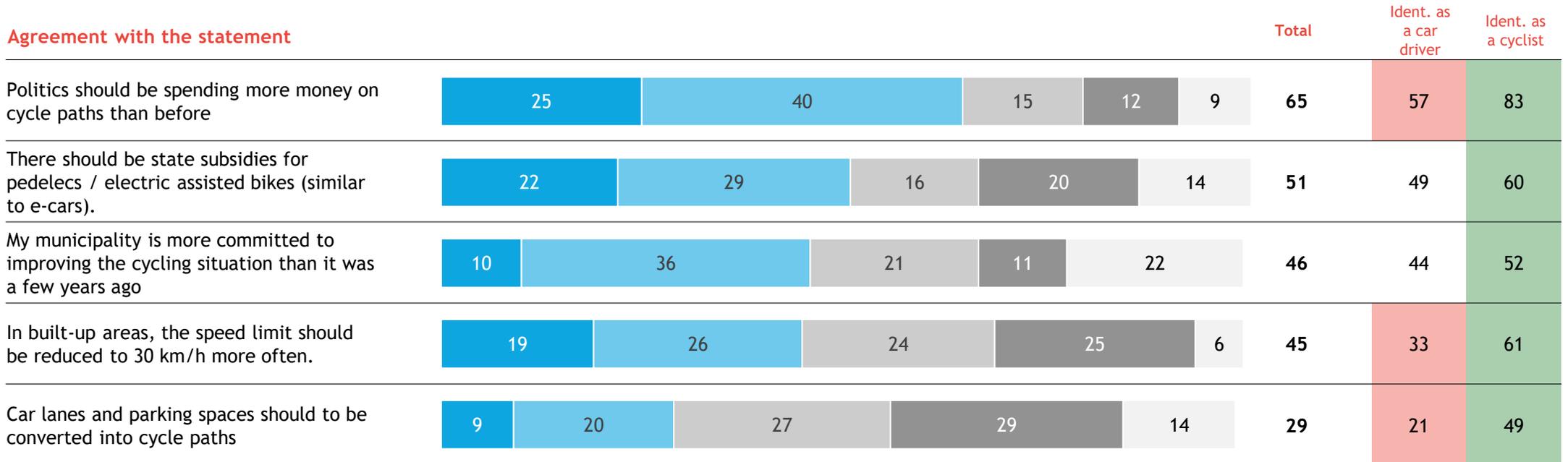
Source: SINUS (2023)

N=4,003 cases, all respondents aged between 14 and 69 years

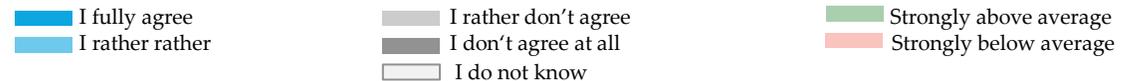
Data in %

Statements on the transformation of transport & mobility

Q66: To what extent do you agree with the following statements?



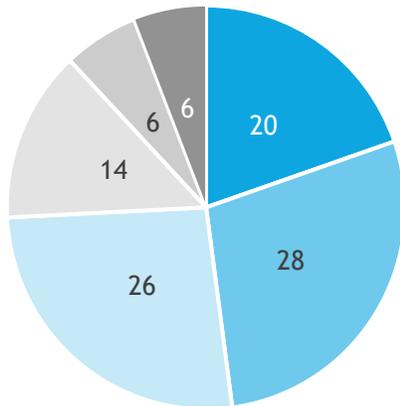
Source: SINUS (2023)
 N=4,003 cases, all respondents aged between 14 and 69 years
 Data in %



Bicycle-friendliness and wishes for the employer

Q62: How bicycle-friendly is your workplace or educational institution? Q63: What could your employer / (educational) institution do to make cycling to work / (educational) institution (even) more attractive for you? What would you wish for? And what is already (sufficiently) available?

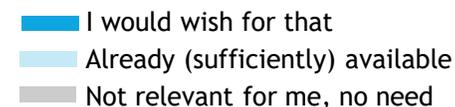
Bicycle-friendliness of the employer



Source: SINUS (2023)
 N=2,964 cases, persons who are employed or in training
 Data in %

Wishes for the employer

Wish	I would wish for that	Already (sufficiently) available	Not relevant for me, no need
Advocate with the municipality / district for better development of cycle paths	41	16	44
Repair option	37	13	49
Set up secure bicycle parking	35	36	29
Set up more bicycle parking spaces	33	34	33
(More) charging options for e-bikes / pedelecs	32	13	55
Bicycle accessories as a (promotional) gift	31	12	57
Possibility for company bike, bicycle leasing	31	27	43
Better public transport connections	29	21	50
Facilities for changing or showering	27	28	45
Mobility advice	18	14	68
Establishment of cycling groups among colleagues	13	11	76
Other financial subsidies	47	12	41



9

Bicycle market

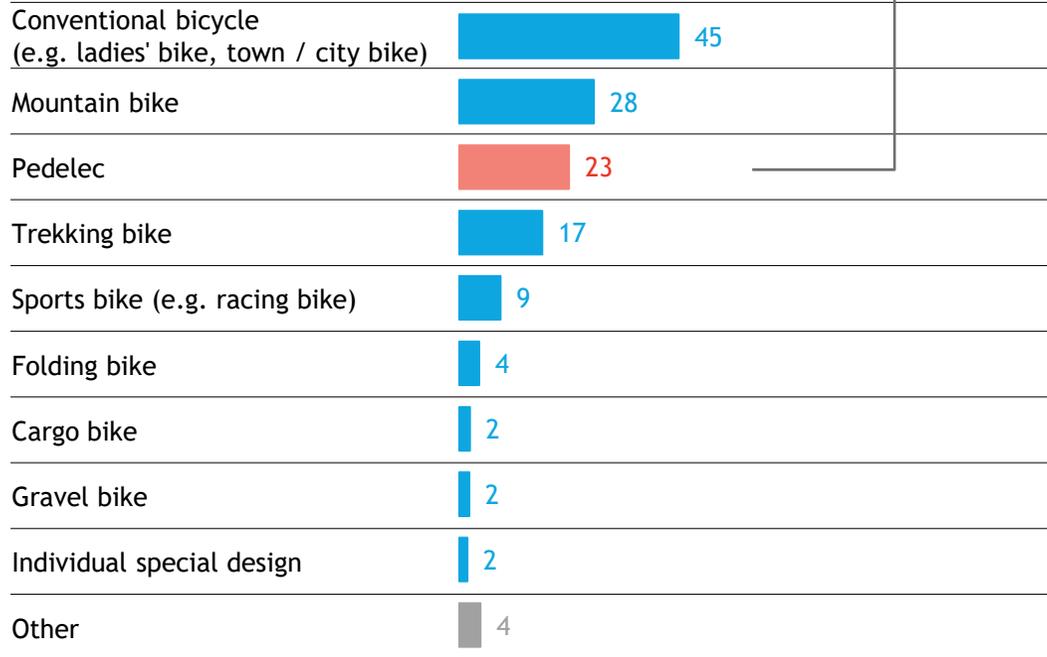
Types of bicycles and pedelecs used

Plans for buying a bicycle

Types of bicycles / pedelecs used

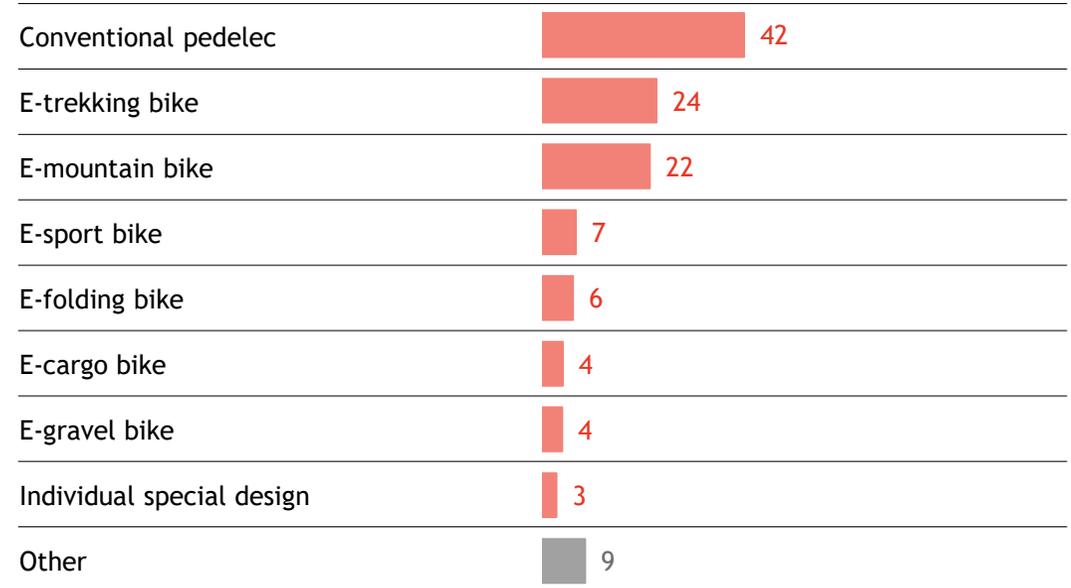
Q86: What type of bicycle(s) do you personally use? (multiple answer)

Type of bicycle used*



F87: You stated earlier that you use a pedelec (electric bicycle). Pedelecs are bicycles with pedal assistance of up to 25 km/h. What type of pedelec (electric bicycle) do you use? All the bicycles listed are of the pedelec variety. (multiple choice)

Type of pedelec used**



Source: SINUS (2023)

*N=3,253 cases, cyclists aged between 14 and 69 years

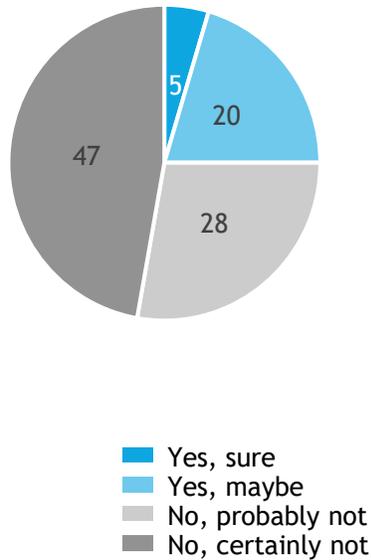
**N=1,126 cases, only pedelec riders

Data in %

Plans for buying a bicycle

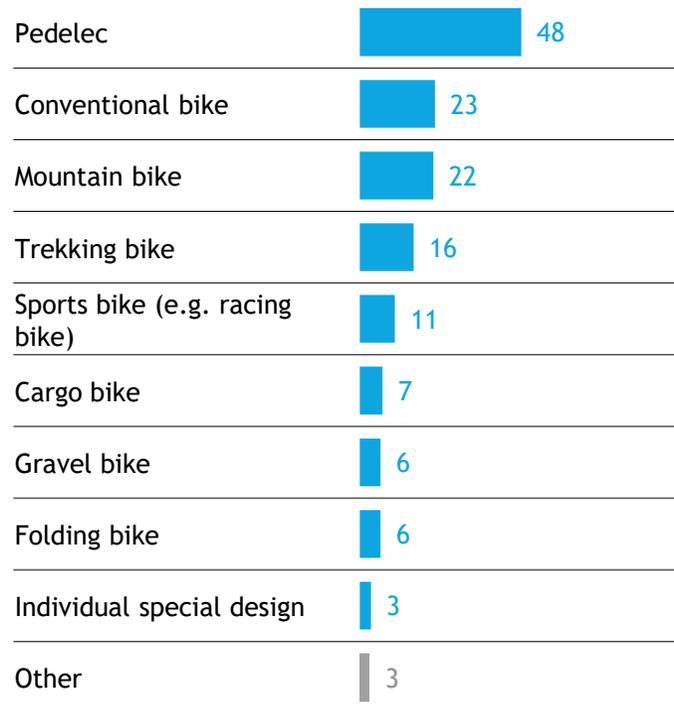
Q88: Are you planning to buy a bicycle in the next twelve months?

Bike purchase planned



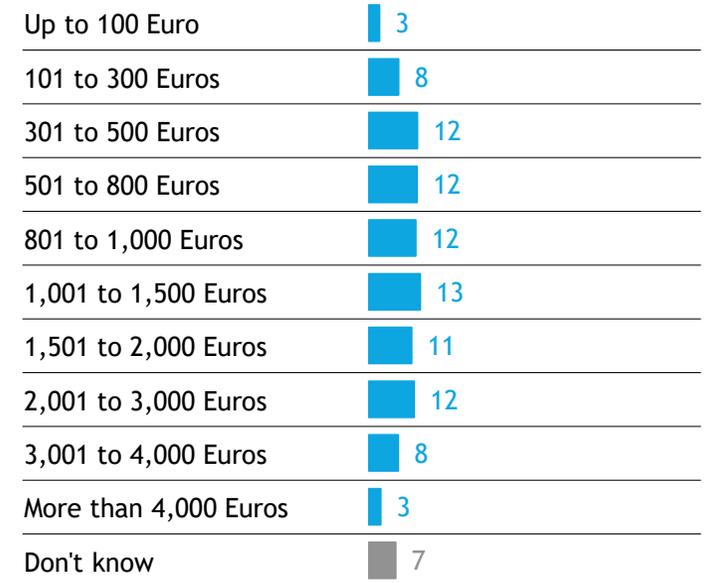
Q89: What type of a bicycle(s) are you likely to buy then? (multiple answer)

Bicycle types*



Q91: How much do you expect to spend on this bike including accessories?

Willingness to spend Ø = approx. 1,424 € *



Source: SINUS (2023)

N=4,003 cases, all respondents aged between 14 and 69 years

*N=1,001 cases, only respondents who plan to buy a bicycle in the next 12 months

Data in %

10

Bike sharing, pedelecs and cargo bikes

Interest

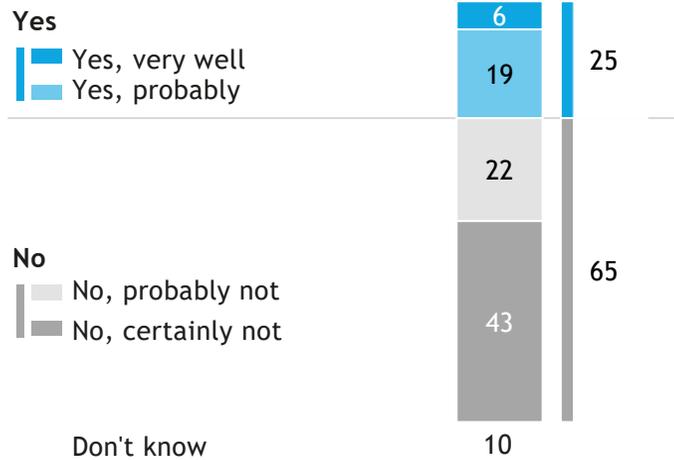
Experience

User shares

Bike sharing: interest, experience and use

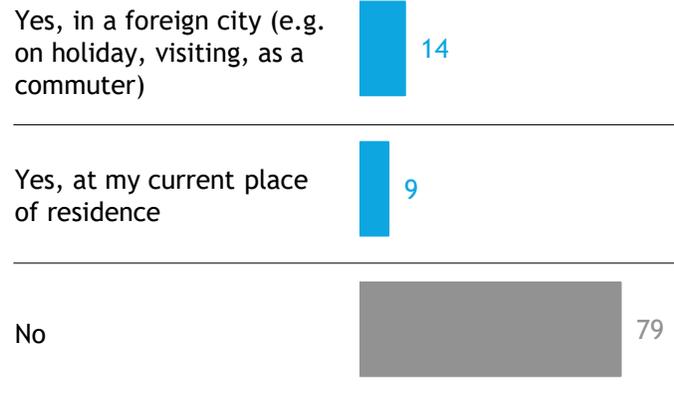
Q93: Can you imagine using a public rental bike system?

Interest in use



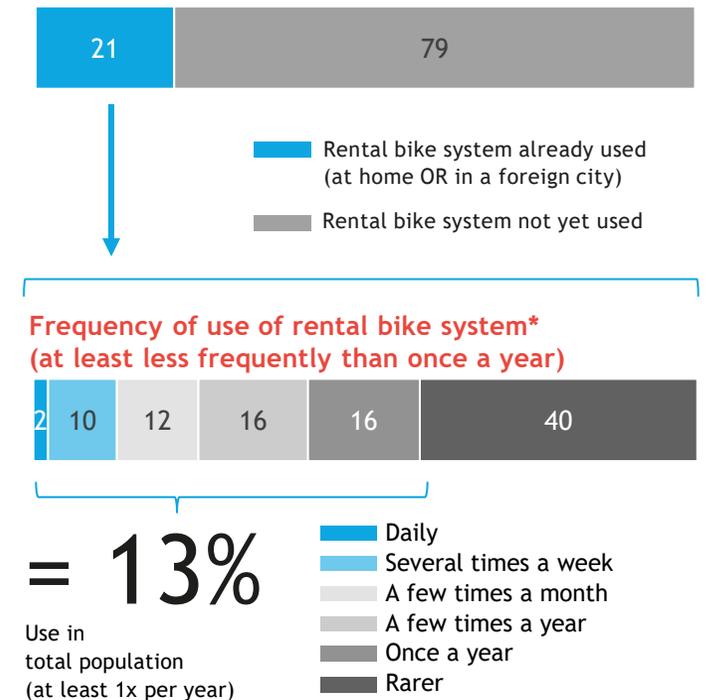
Q94: Have you ever used the possibility of renting a bicycle through a rental system?

Experience



F95: How often do you currently use the rental bike system, whether on holiday or at your own place of residence?

Use of rental bike system



Source: SINUS (2023)

N=4,003 cases, all respondents aged between 14 and 69 years

*N=839 cases, only respondents who have already used a bicycle via a rental system

Data in %

Pedelecs: Use, interest and experience



Current use

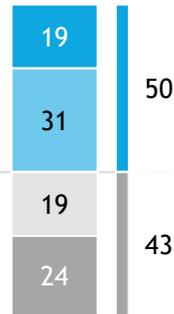
18%

Q96: Are bicycles that have an integrated electric motor (pedelecs) generally interesting for you?

Interest in pedelecs

Interesting

- Yes, very interesting
- Yes, rather interesting



Uninteresting

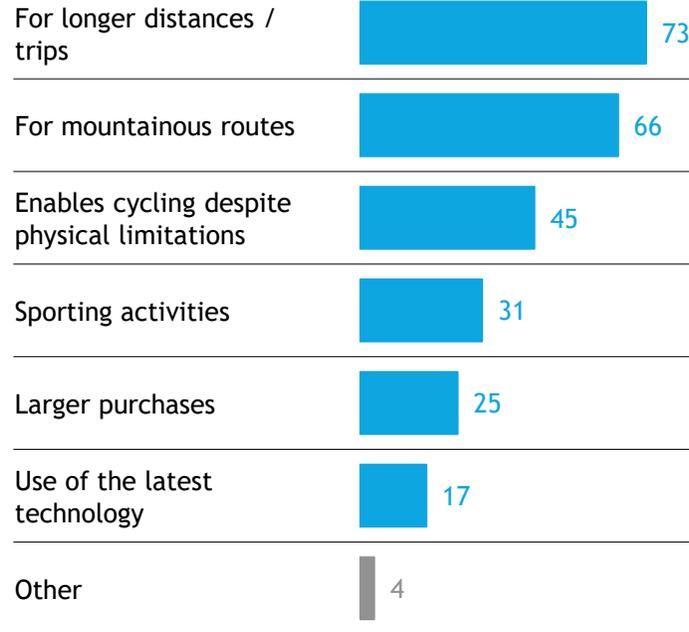
- No, rather not interesting
- No, absolutely uninteresting

Don't know

7

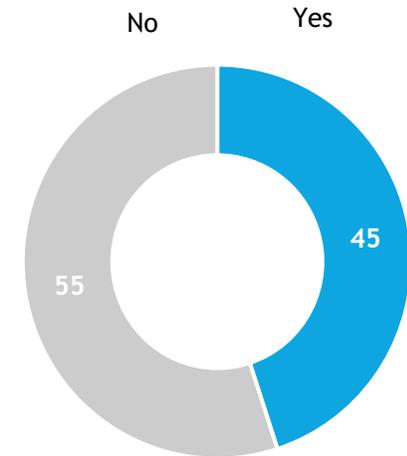
Q97: For which purposes is a bicycle with an integrated electric motor with pedal assistance up to 25 km/h (pedelecs) interesting for you? (multiple answer)

Possible uses for pedelec*



Q98: Have you ever ridden a bicycle that had an electric motor with pedal assistance up to 25 km/h (pedelec) for support?

Experience with pedelecs



Source: SINUS (2023)

N=4,003 cases, all respondents aged 14-69 *N=2,005 cases, respondents who generally find bicycles with an electric motor (pedelecs) interesting

Data in %

Cargo bikes: use and interest



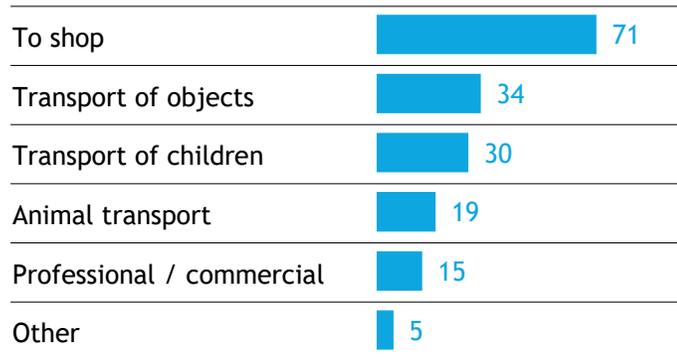
Current use

3%

without OR with electric assistance

Q100: You stated that you own a cargo bike. What do you use the cargo bike for? Select all that apply. (multiple choice)

Purposes of use (cargo bike owners)*.



Source: SINUS (2023)

N=4,003 cases, respondents between 14 and 69 years of age

*N=97 cases, cyclists who own a cargo bike

**N=575 cases, respondents who can imagine acquiring a cargo bike

Data in %

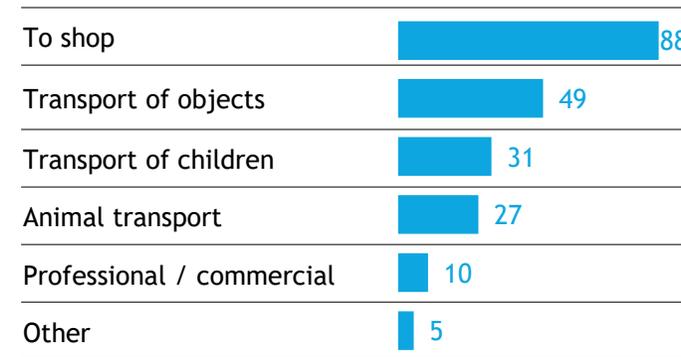
Q101: Can you generally imagine acquiring a cargo bike?

Interest in buying



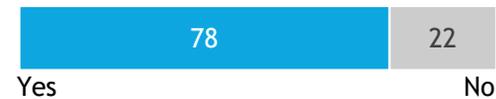
Q102: What would you want to use it for? Select all that apply. (multiple choice)

Possible uses (interested parties)**



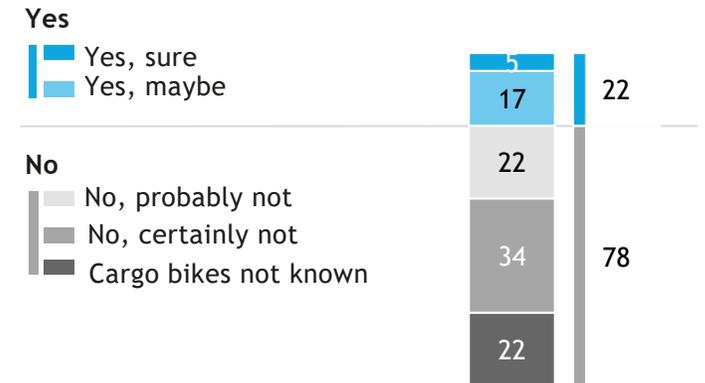
Q99: Have you ever heard of cargo bikes?

Familiarity



Q103: Can you imagine using a rental system for cargo bikes?

Interest in cargo bike rental



11

Cycling tourism

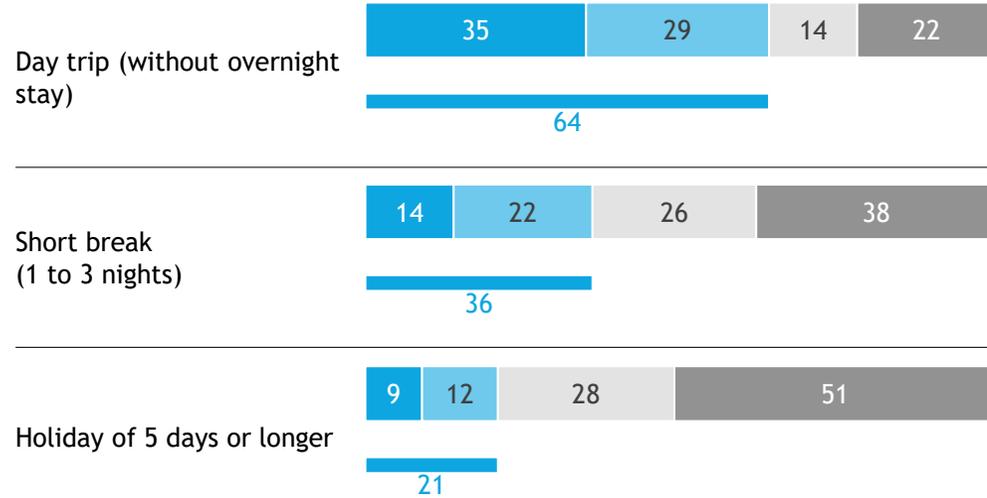
Trips and holidays

Holiday destinations

Cycling trips and holidays - potentials and planning 2023

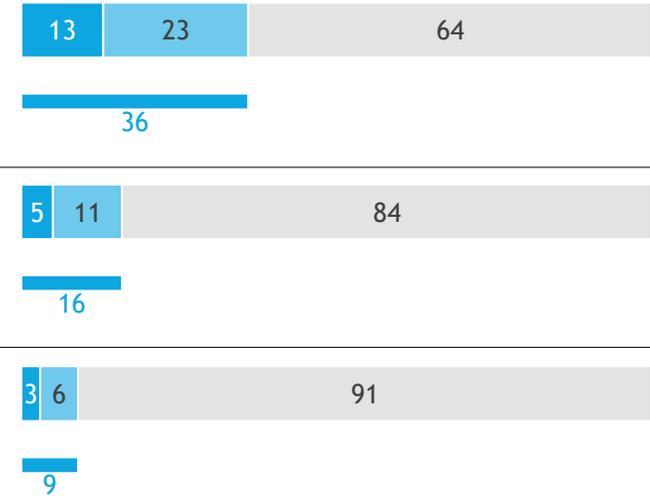
Q82: Is a day trip, short holiday or longer holiday by bike an option for you?

Potential



Q83: Are you planning a day trip, short holiday or longer holiday by bike this year?

Planning



- Yes, it's totally an option for me
- Yes, it could be an option for me
- No, it's rather out of the question for me
- No, it's not an option for me at all

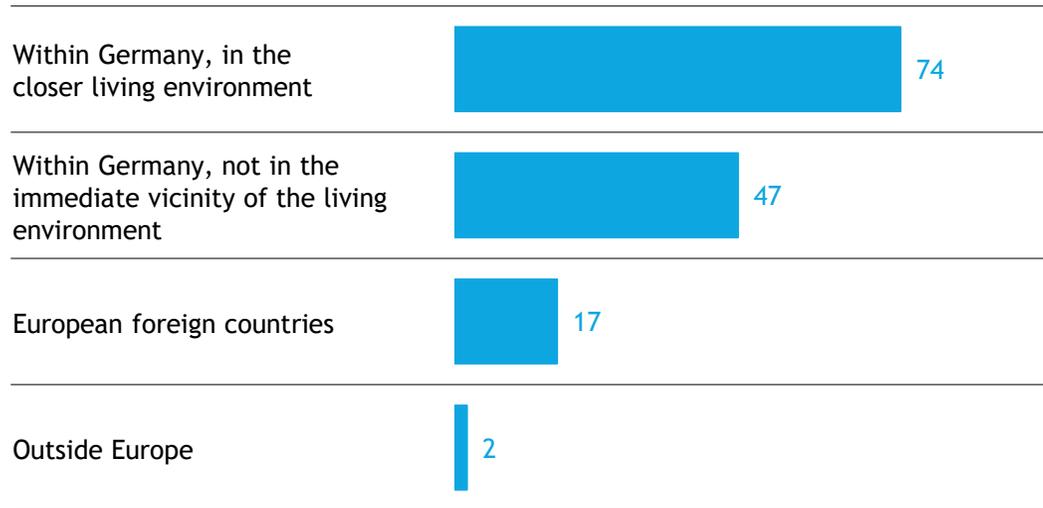
- Yes, I am planning and already have firm plans.
- Yes, I plan to, but have no firm plans yet
- No, I am not currently planning a cycling holiday

Source: SINUS (2023)
 N=3,253 cases, cyclists between 14 and 69 years old
 Data in %

Destinations for cycling holidays

Q84: Which of these regions would you consider for a cycling holiday (at least one overnight stay) this year? Select all that apply. (multiple answers)

Regions*



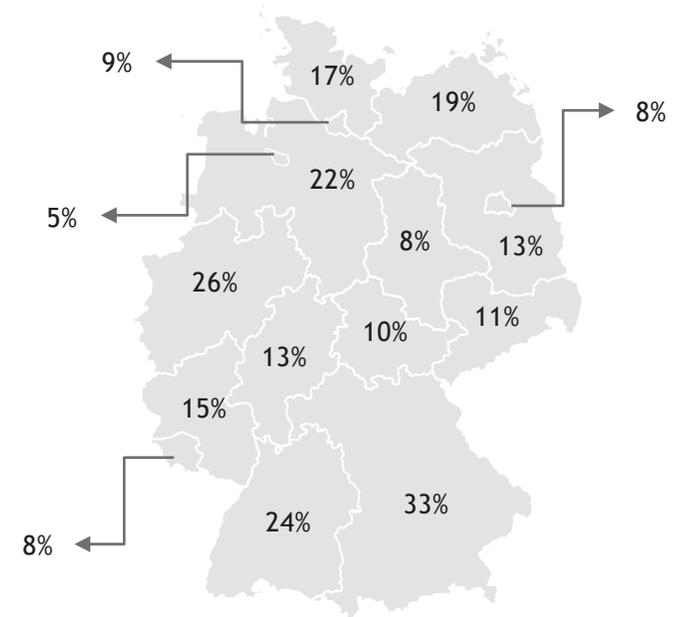
Source: SINUS (2023)

*N=2,169 cases, cyclists for whom a day trip or holiday by bike is an option

Data in %

F85: Which of these federal states would you consider for a holiday by bike (at least one overnight stay) this year? Select all that apply. (multiple choice)

Federal states in question**



Source: SINUS (2023)

**N=2,074 cases, cyclists who can imagine a cycling holiday within Germany

Note: Respondents who can imagine a cycling holiday in a federal state are predominantly from the respective federal state; data in %.

12

Cycling in smaller municipalities vs. in the city

Overview

Summary: Country vs. city

Overview of the most significant differences

	 In the countryside/in small towns (up to 20,000 residents)	 In medium-sized towns (20,000 to 100,000 residents)	 In large cities (from 100,000 residents)
Wish to use the bicycle / pedelec more often in the future	46%	49%	45%
Regular bicycle use (at least several times a week)	37%	38%	43%
Positive feeling of safety among cyclists*	63%	61%	56%
Reason cited for insecurity named more frequently than average**	No cycle paths available or only partially available (53%)	Poor condition of cycle paths / cycle lanes (41%)	Suddenly opening doors (52%)
Most frequently used road type to cycle*	Roadway without marked cycle lane (51%)	Shared footpath and cycle path on pavement without separation (50%)	Separate footpath and cycle path on pavement (52%)
Combination bicycle & public transport	25%	33%	37%
Regular use of bicycle helmet*	51%	42%	47%
Cycling in my municipality / city is fun	58%	52%	48%
Use of rental bike system (at least 1 time per year)	9%	12%	18%
Use of pedelecs	22%	19%	14%
Cargo bike potential	17%	16%	17%

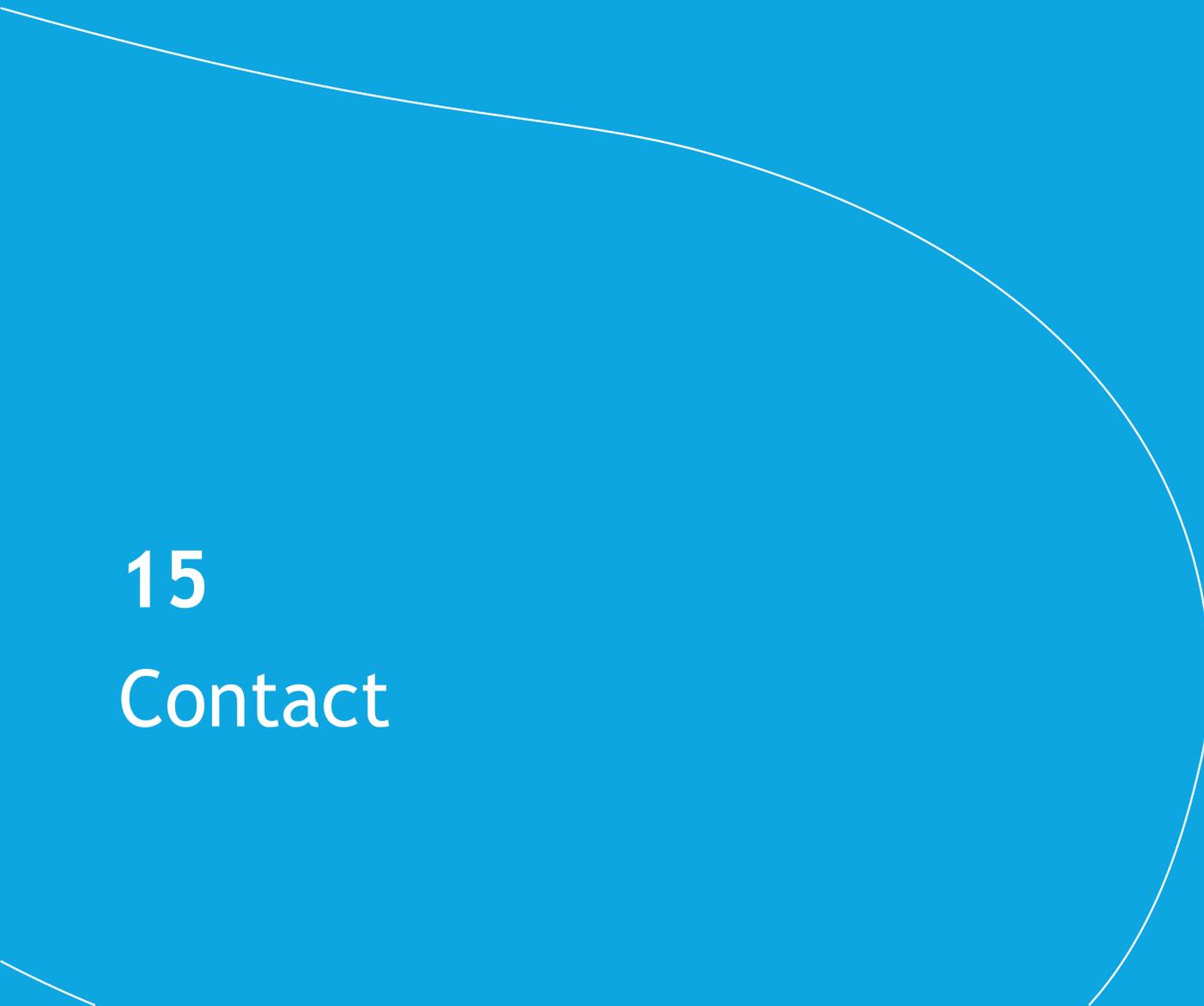
Source: SINUS (2023)

N=4,003 cases, all respondents aged between 14 and 69 years

*N=3,253 cases, cyclists aged between 14 and 69 years

**N=1,288 cases, cyclists who feel unsafe in road traffic

Data in %



15
Contact

Contact



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