

2021 Cycling Monitor Germany

Selected results from a representative online survey

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17 November
2021

Gefördert durch:



Bundesministerium
für Verkehr und
digitale Infrastruktur

aufgrund eines Beschlusses
des Deutschen Bundestages

01

Key findings

Key findings

Availability and use of means of transport

- Of all means of transport, bicycles and pedelecs have the greatest potential for growth. In future, 41% of respondents aged between 14 and 69 intend to use it more often.
- As a result of the COVID 19 pandemic, individual mobility patterns have changed. While walking, cycling and driving a car have benefited, public transport, air transport and long-distance rail services experienced drawbacks.
 - When the survey was undertaken, 38% stated they walked more often, 25% said they cycled more frequently and 20% indicated to use the car more often than before the pandemic.
 - By contrast with the pre-pandemic situation, 37% of respondents stated to use local/regional public transport services less frequently, 35% said they flew less often and 32% indicated to make less use of long-distance rail services.
- 77% of people in Germany use a bicycle or pedelec. 38% use bicycles or pedelecs regularly, i.e. daily or several times a week as a means of transport and/or during leisure time.
 - This figure is slightly lower than in previous years (2020: 40%; 2019: 43% regular users). One explanation is that restrictions were in place at the time of the survey (May/June 2021) due to the coronavirus pandemic and, as a result, many commuters, trainees or students – instead of travelling to the place of work or education – worked from or learned at home. Moreover, it was a rather cold and wet period, which usually also means lower bicycle use.
 - Bicycles are used roughly to the same extent as means of transport and for leisure activities (means of transport: 28%, leisure activities: 26%; at least several times a week).
 - Use of bicycles increases with the size of the place of residence (rural areas/small towns, i.e. residential areas with fewer than 20,000 inhabitants: 31% regularly use the bicycle vs. major cities, i.e. places of residence with more than 100,000 inhabitants: 44%).
 - The youngest age group (14-29 years) uses bicycles most frequently. As the age increases, use declines (14-29 years: 45% regularly use the bicycle, 30-49 years: 38%, 50-69 years: 34%).

Key findings

Safe cycling

- It is noteworthy that almost half (45%) of all cyclists always or mostly wear a cycle helmet. This is a significant increase over previous years (2021: 45%, 2019: 30%, 2017: 31%).
 - One reason might be the increased use of electric bicycles (use of helmets more frequent here, e.g. due to higher average speeds). Past advertising and awareness-raising campaigns might also have contributed to more helmets being bought and worn.
 - The greatest increases were found among the 60-69-year-olds (+ 16% to 48%), 20-29-year-olds (+ 13% to 44%) and 14-19-year-olds (+ 10% to 37%).
- Cyclists feel safer: 63% of cyclists feel very safe or quite safe (2019: 56%, 2017: 53%). 37% in turn feel less safe on their bicycle.
 - The main reasons stated are too much traffic (64%), reckless car drivers (62%) and insufficient separate cycle tracks (57%).

Key findings

Transport policy

- From the point of view of respondents, there is room for improvement in terms of cycling friendliness.
 - 42% rate the cycling friendliness of the Federal Government with a school grade between 1 and 3.
 - Federal state governments (with 51%) and local governments (with 56%) are slightly better off.
- The five most urgent demands on policymakers are:
 1. Build more cycle tracks (57%)
 2. Separate cyclists more efficiently from passenger cars (53%) and pedestrians (45%)
 3. Establish more advisory and mandatory cycle lanes (43%)
 4. Provide safe bicycle parking facilities (41%)
 5. Build more cycle-only roads (39%)

Key findings

Innovations on the bicycle market

- Nearly half of all respondents (47%) expressed a general interest in pedelecs. Almost one in three respondents (31%) have already used a pedelec. However, only 14% of the respondents actually own a pedelec.
 - Pedelecs are frequently owned by men (16%) and 30-39-year-olds (17%).
 - The pedelec is by far the most popular category of bicycle when it comes to new purchases. 41% of potential buyers plan to buy a pedelec. For comparison: With 31%, mountain bikes come second.
- 65% of all respondents are familiar with cargo cycles, but only 2% use one.
 - 12% of the respondents can imagine buying one. Younger people aged between 20 and 39 years as well as people living in major cities are most interested.
 - 6% of all potential buyers plan to purchase a cargo bicycle over the next 12 months. This is equivalent to around 920,000 new cargo cycles per annum.
- 29% of respondents stated there is a public bicycle hire scheme at their place of residence. 12% use cycle hire schemes at least once a year.
- 2% of all respondents are planning to buy a personal light electric vehicle in the next 12 months, while another 10% are still uncertain about buying one.

Key findings

Reasons for using bicycles and requests to employers

- 30% of cyclists (approx. 13.6 million Germans) make intensive use of their bicycles, i.e. they ride more than 30 km per week.
- Bicycles are most frequently used for short errands or grocery shopping (56% at least a few times a month), followed by visits to friends, family or acquaintances (44%) and day trips (30%).
- Among those working and those undergoing training, 22% use the bicycle on their way to work or to the place of education.
 - Bicycles are more frequently used for commuting by young people and in urban areas.
- The five most frequent requests to employers or places of education or training to make getting there by bicycle more attractive are:
 1. Financial aids for cycling (42%)
 2. Commitment of employers/places of education to improve cycle tracks in the municipality (39%)
 3. Repair options (36%)
 4. Secure parking facilities (36%)
 5. More parking facilities (39%)

Key findings

Cycling infrastructure

- Many respondents already have experience with innovative cycling infrastructure.
 - 36% of all respondents have already used a cycle-only road, 10% have used a pop-up cycle track, 8% a protected cycle track and 6% a cycle superhighway.
- In some major cities, such as Berlin and Munich, pop-up cycle track were set up at the start of the COVID 19 pandemic in 2020. A large majority (63%) of all respondents welcome the establishment of pop-up cycle tracks.
 - It is not possible to talk of a fundamental dichotomy between cyclists and motorists. 71% of regular cyclists rate pop-up cycle tracks positively. However, pop-up cycle tracks are also welcomed by 62% of regular motorists.
 - A similar share (68%) of all respondents recommend to partially preserve or structurally consolidate this temporary cycling infrastructure.
 - Almost a quarter (23%) of the respondents even want to permanently preserve all cycle tracks set up temporarily during the COVID 19 pandemic.

Key findings

Cycling tourism and market

- Many people in Germany consider cycling holidays attractive. In principle, 34% of the respondents can imagine going on a short cycling holiday (one to three overnight stays); 21% of the respondents can also imagine longer cycling holidays (four or more overnight stays).
- At the time of the survey, 17% had planned a cycling holiday for 2021, including at least one overnight stay. This corresponds to around 11.2 million cyclists (including their children). 10% of them had already chosen a destination.
 - The clear majority said they intended to stay in Germany.
 - 26% planned a cycling holiday in Europe, 5% outside of Europe.
- The German Long-Distance Cycle Network (D-Netz) with a length of over 11.700 km is known to 15% of all respondents, and 7% have already travelled on one or more of the D-Netz routes.
- Cyclists mainly use conventional bicycles such as ladies bicycles or city bicycles (56%), followed by mountain bikes (35%) and trekking bikes (19%). Presently, 19% of cyclists use a pedelec and 2% a cargo cycle.
- 27% of all respondents plan to buy a new bicycle within the next 12 months. The average budget is around EUR 1.052.

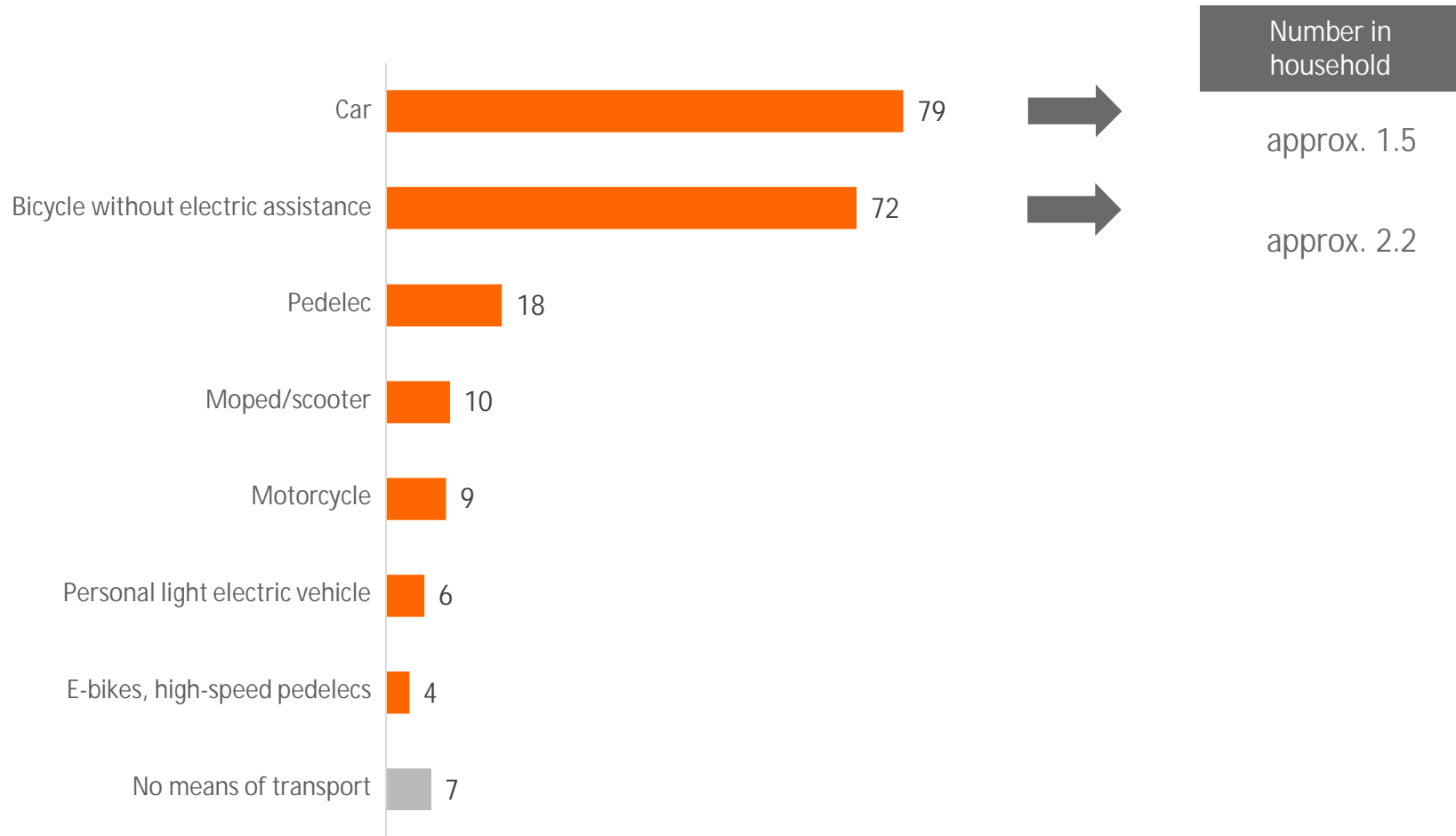
02

Use of means of transport

Availability, user analysis, future use

Available means of transport

What means of transport are available for use in your household? (multiple answers possible)



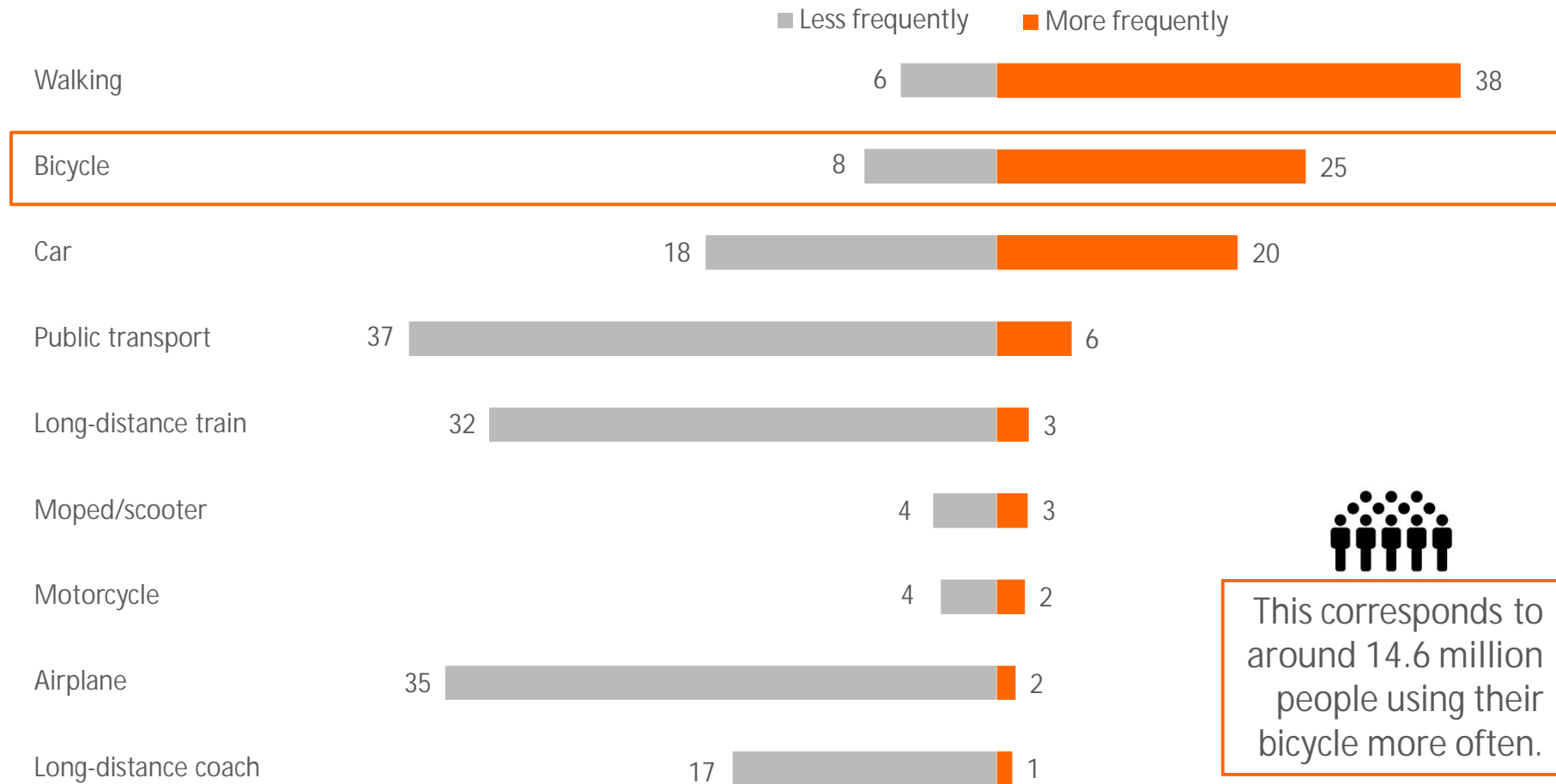
Figures in percent

N = 3,107; all respondents

Changes in individual patterns of mobility

Comparison with the situation prior to the corona pandemic (2019)

Please compare your current use of means of transport with the time before the coronavirus pandemic.
Do you use the following means of transport more frequently, just as often or less frequently?



This corresponds to around 14.6 million people using their bicycle more often.

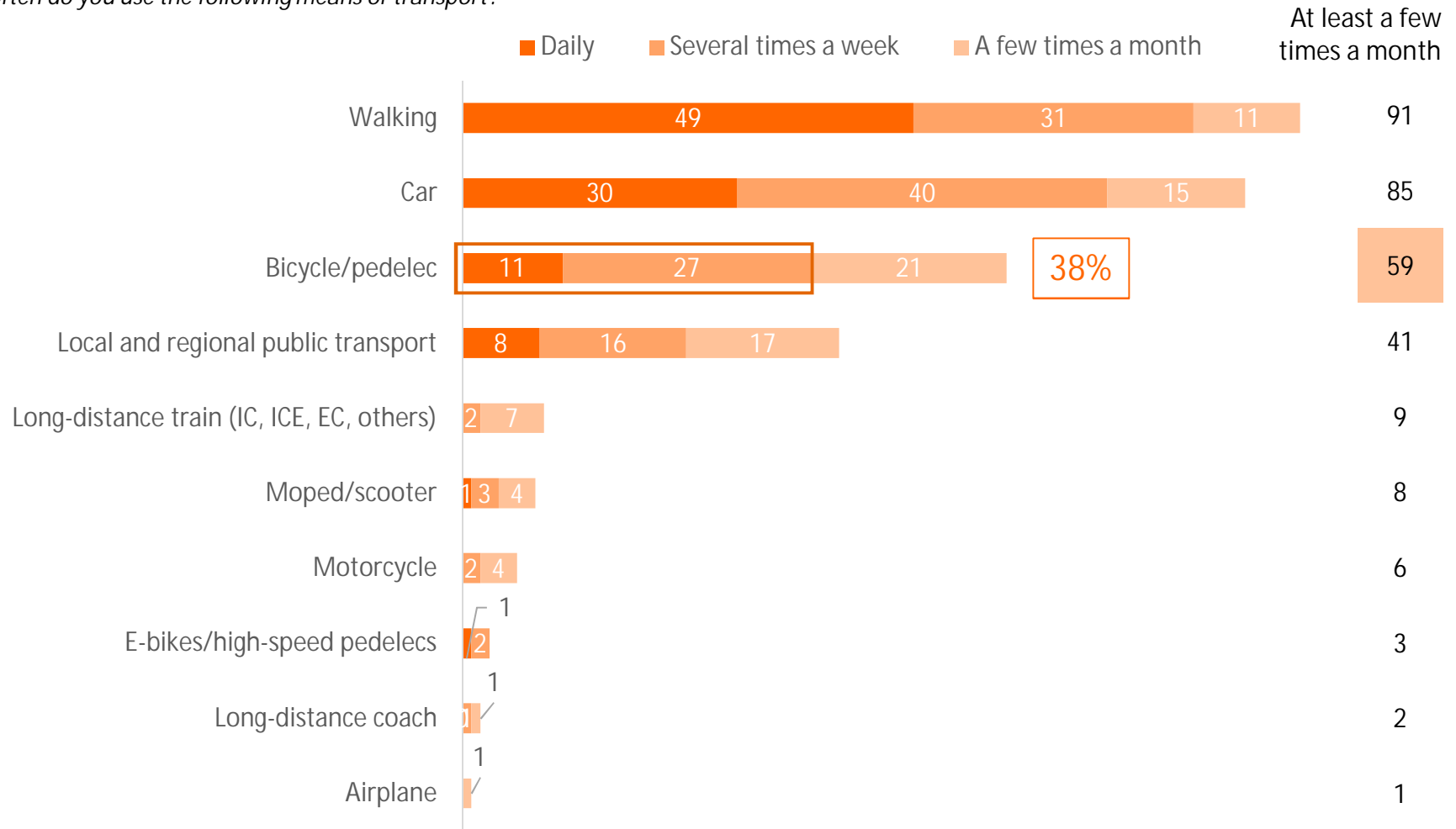
Figures in percent, values missing for 100%: "just as often" and "have never used and don't use now"

N = 3,107; all respondents

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

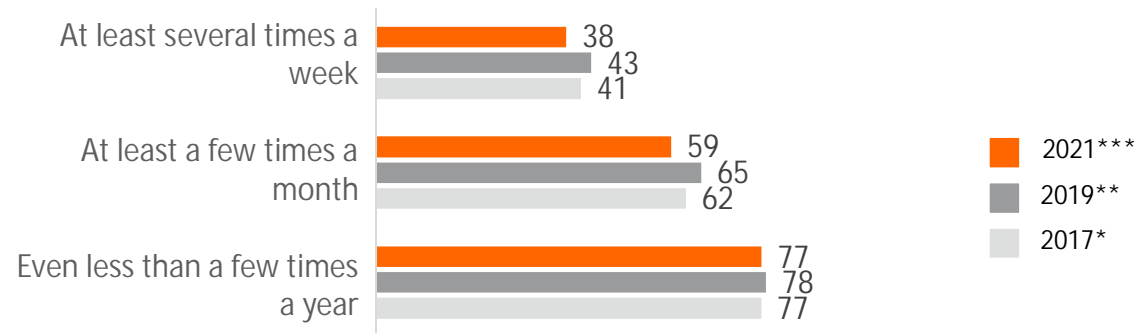
N = 3,107; all respondents

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

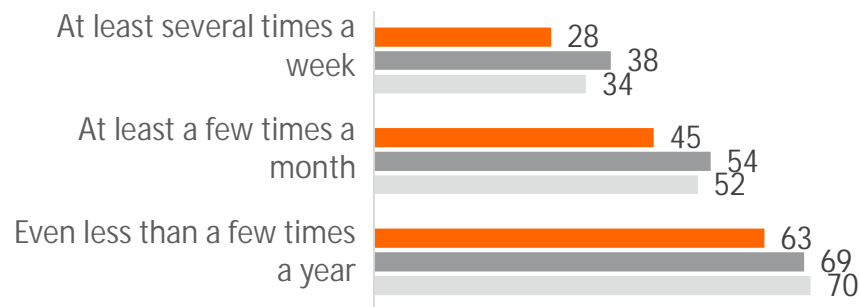
Time comparison survey 2021 – 2019 – 2017

How often do you use the following means of transport?

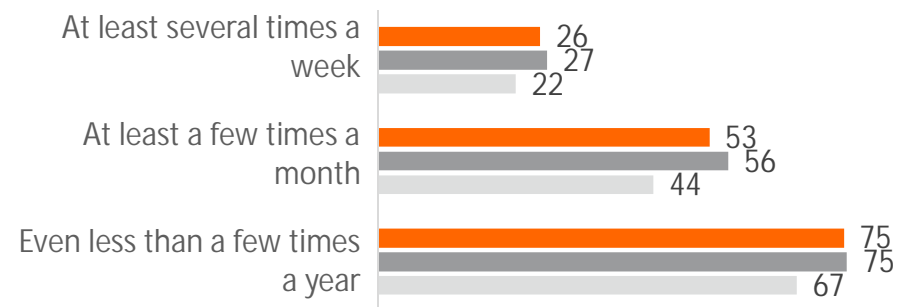
Bicycle (means of transport/leisure time activity)



Bicycles as a pure means of transport



Bicycles as a leisure time activity



Figures in percent

Please note: Because of refined sampling, comparability of the different surveys is limited. Maximum range of variation: 4%.

***N = 3,107 persons

**N = 3,053 persons

*N = 3,156 persons

Regular use of the different 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

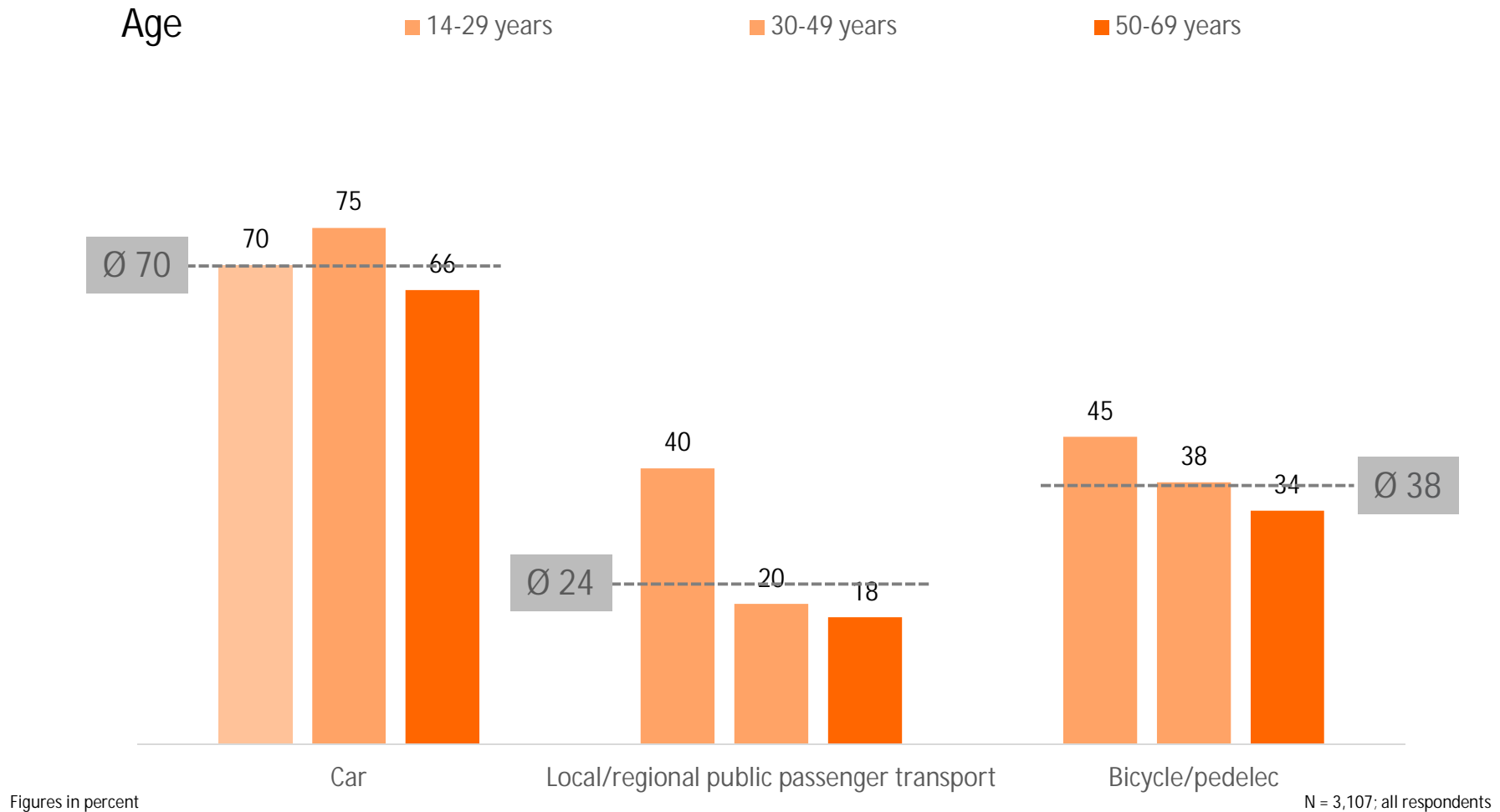
Town/city size categories: rural areas/small towns: < 20.000 inhabitants, medium-sized cities: 20.000-100.000 inhabitants, major cities: > 100.000 inhabitants

N = 3,107; all respondents

Regular use of the different means of transport

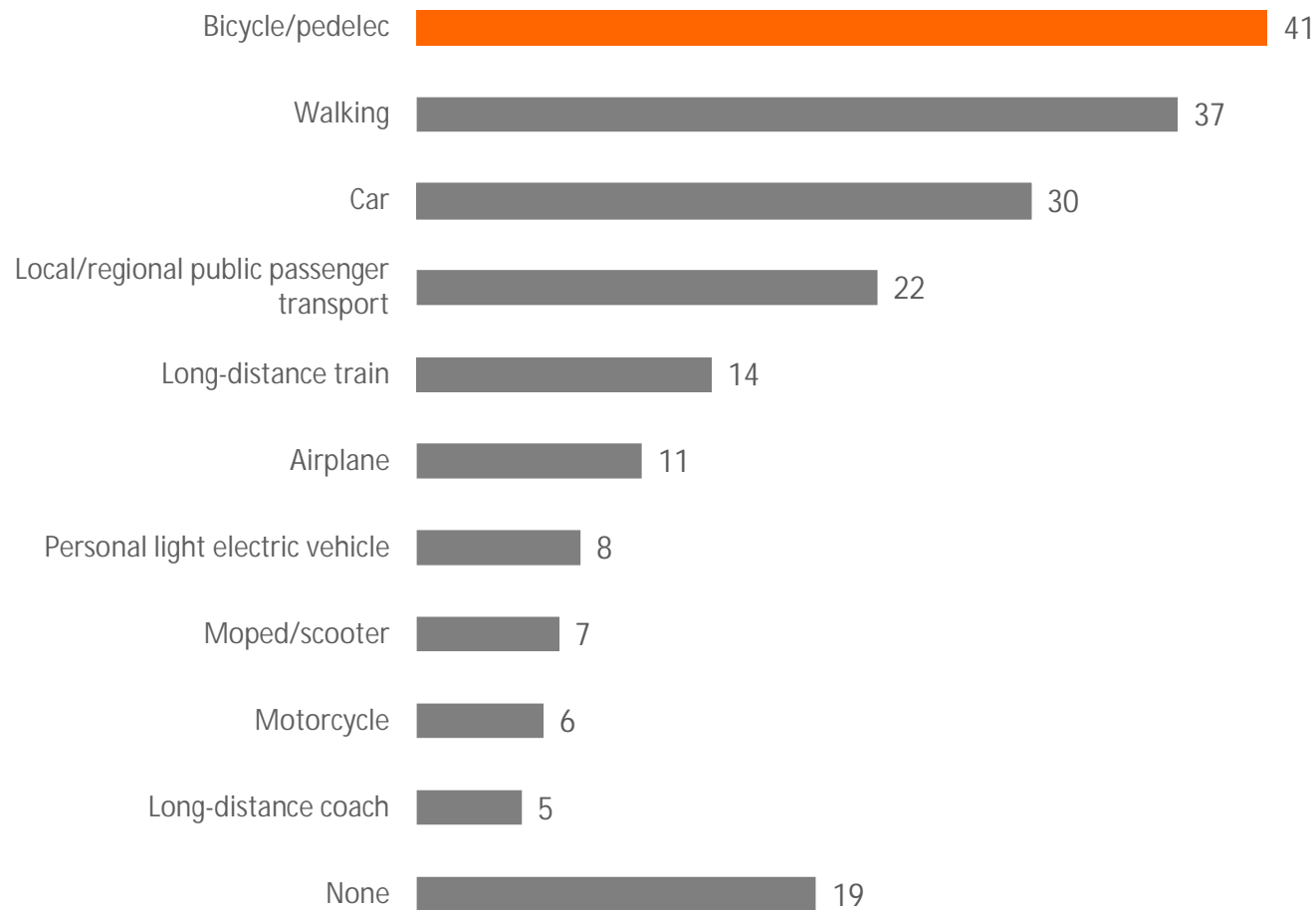
Regular users by age

How often do you use the following means of transport? – daily/several times a week



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? (multiple answers possible)



Figures in percent

N = 3,107; all respondents

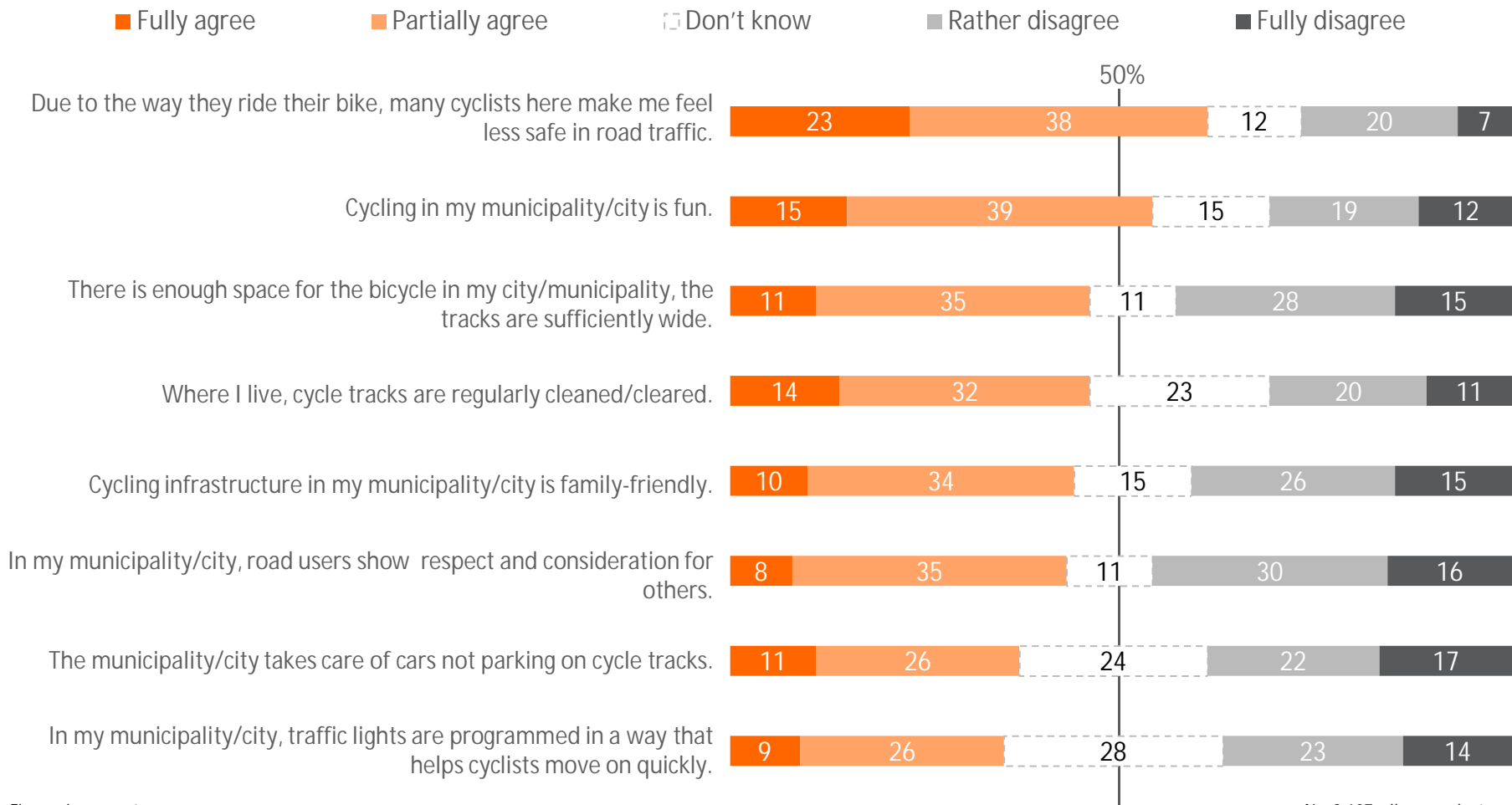
03

Safety

Cycling situation in municipalities, subjective safety, mutual respect in road traffic, use of helmets

Statements cycling situation in municipalities/cities

Please state to what extent the following statements are applicable to you.



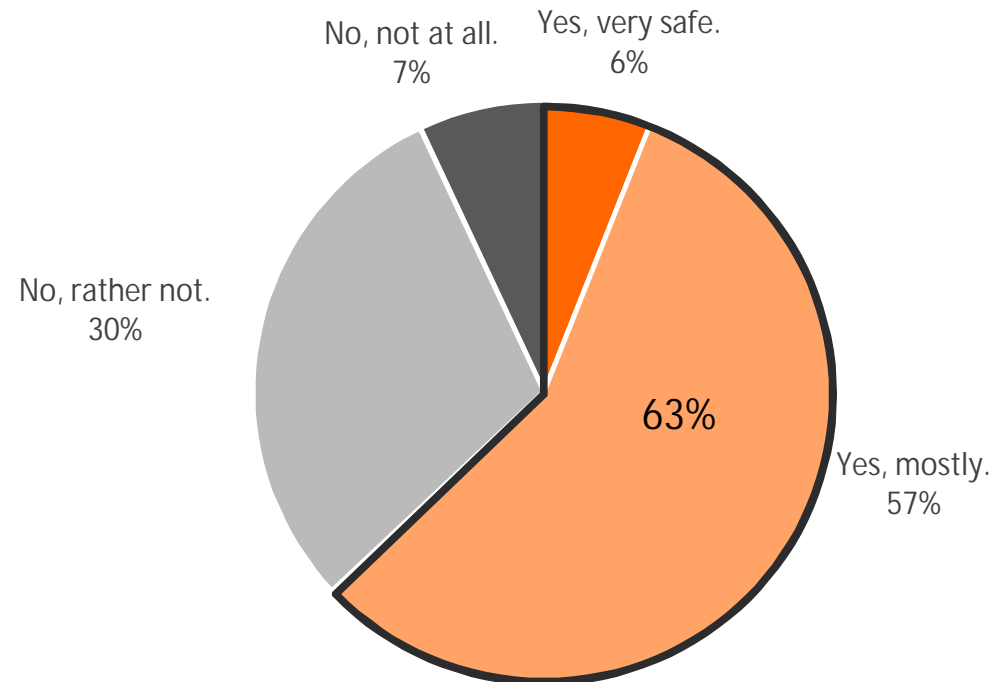
Figures in percent

N = 3,107; all respondents

Feeling of safety when cycling in road traffic

Personal feeling of safety

Do you feel safe when cycling in road traffic?

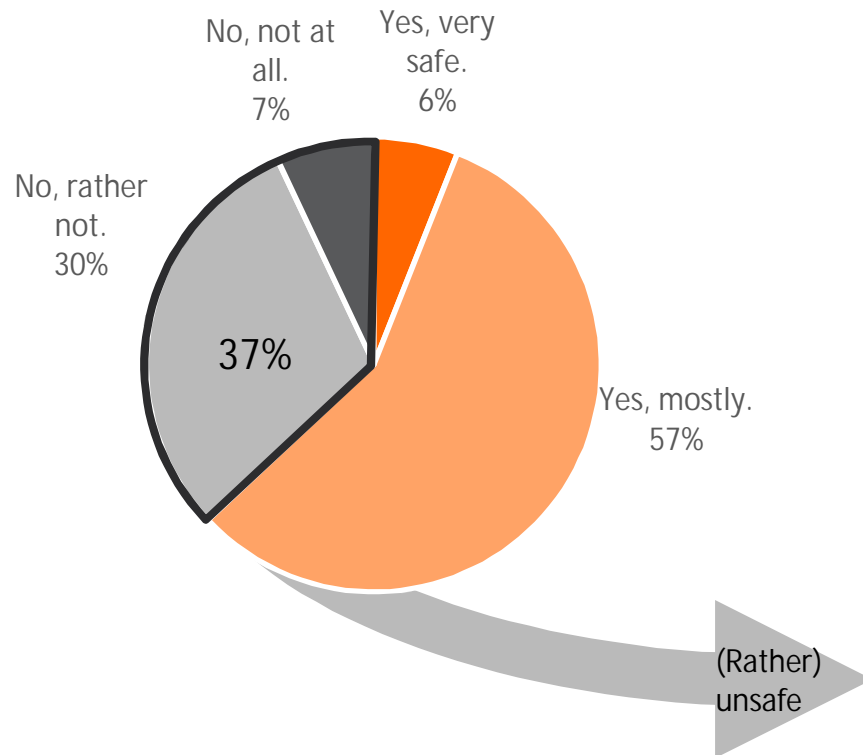


N = 2,397; cyclists

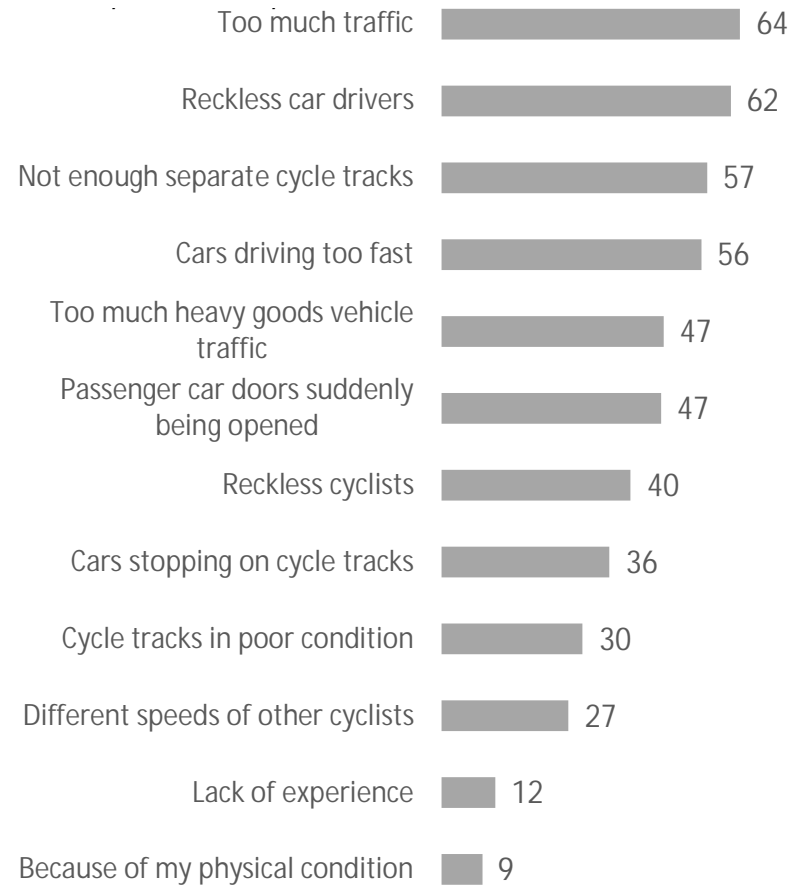
Reasons for not feeling safe in road traffic

Personal feeling of safety

Do you feel safe when cycling in road traffic?



Why do you feel (rather) unsafe?
(multiple answers possible)



Figures in percent

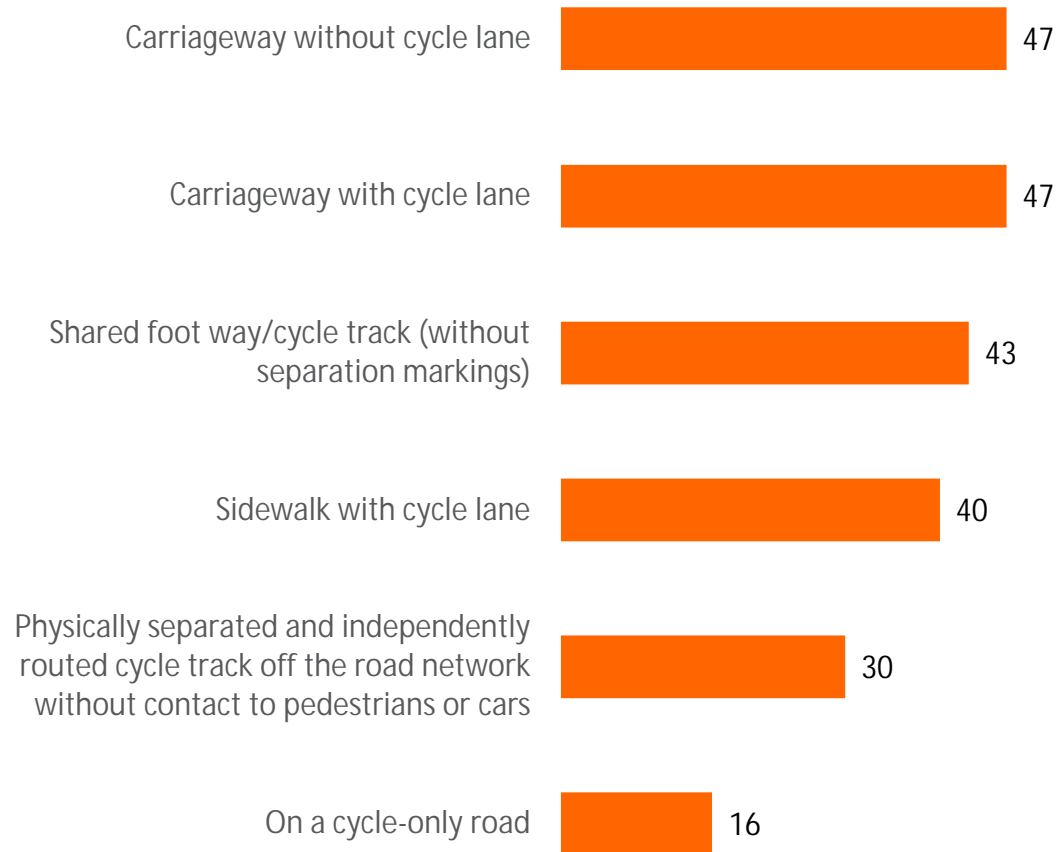
N = 2,397; cyclists

N= 875; persons who rather not or not at all feel safe in road traffic

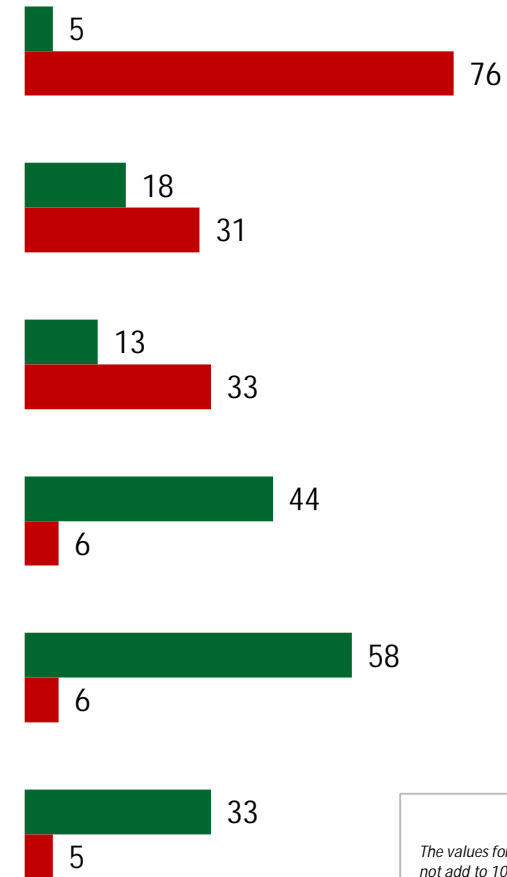
Types of roads used

Most common types of roads used and subjective safety

Which of the following types of roads do you mainly use? (multiple answers possible)



Please name up to two types of roads where you feel most safe/unsafe with your bicycle.



The values for each row do not add to 100%, as only up to 2 types that are considered to be the most safe/most unsafe could be indicated.

Figures in percent

■ Ways travelled

■ Feel safe

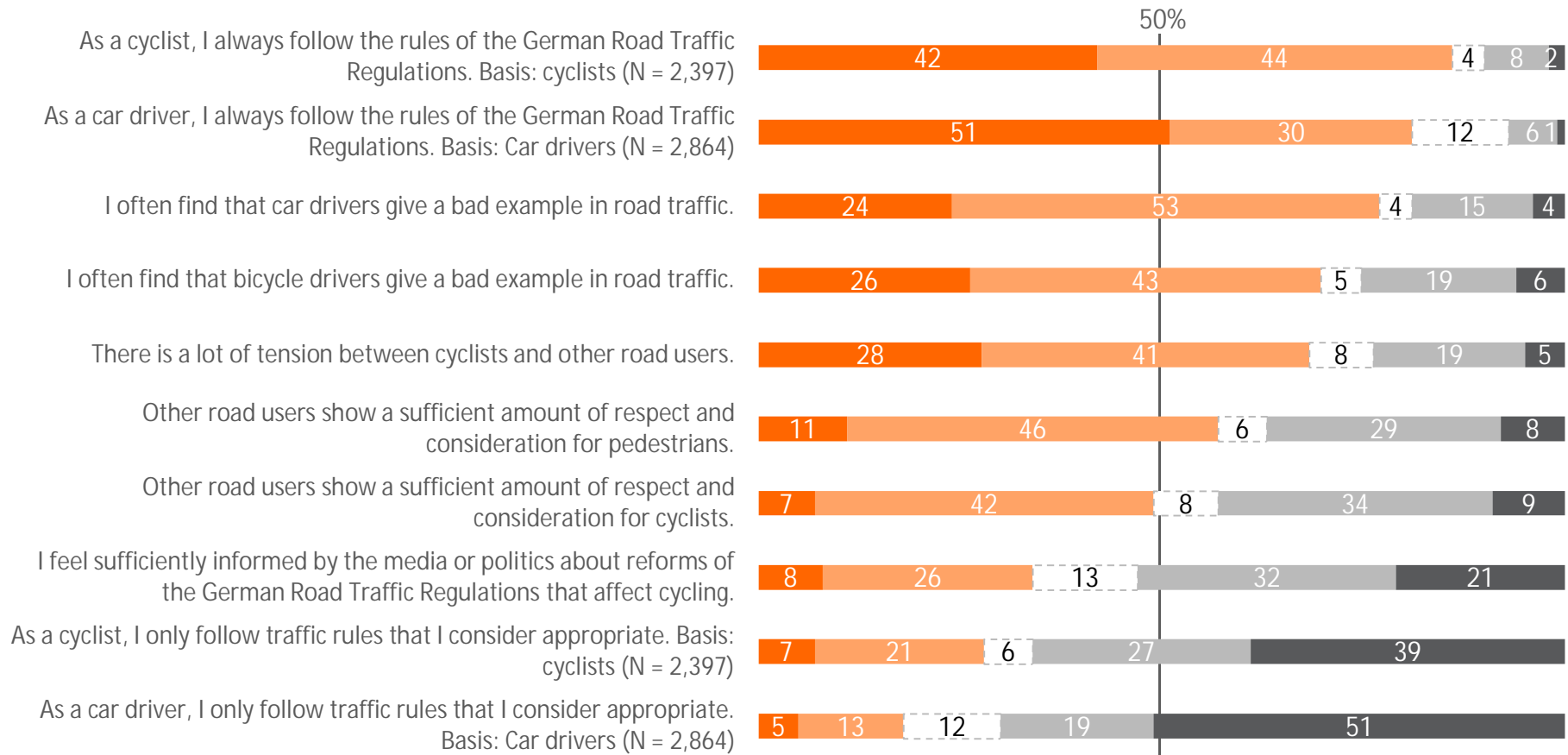
■ Do not feel safe

N = 2,397 cyclists

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

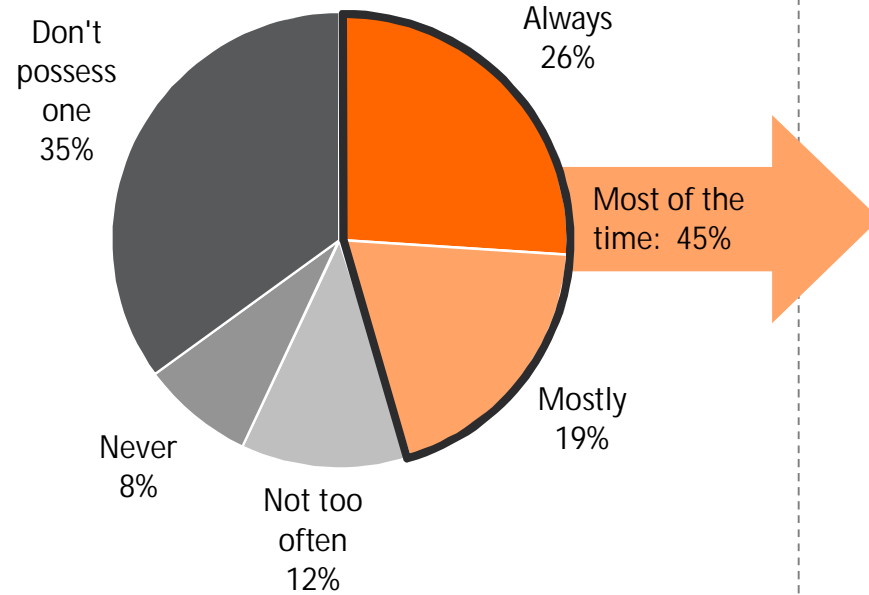
N = 3,107; all respondents

Possession and use of bicycle helmets

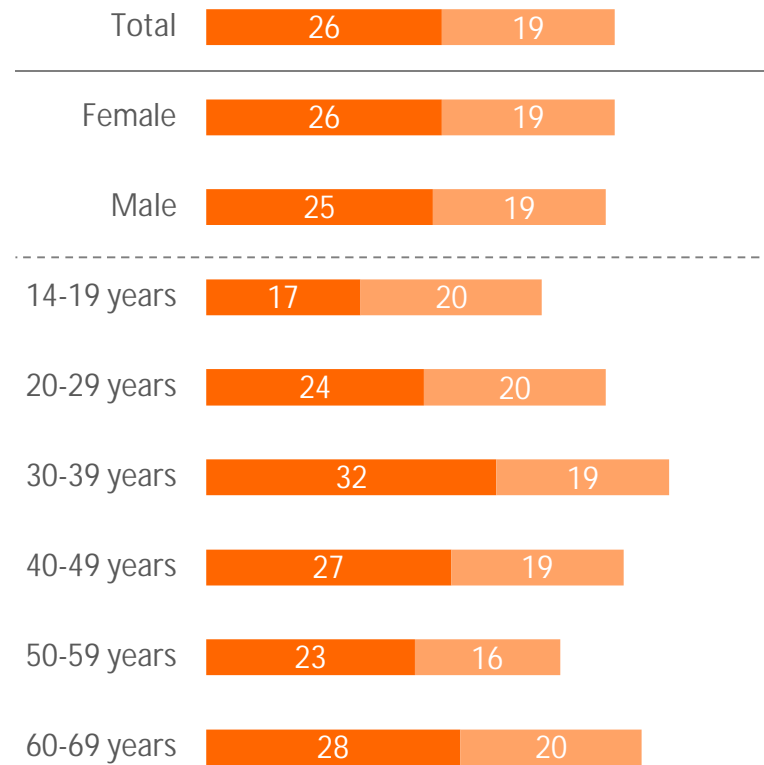
Based on sociodemographics

Possession & use

How often do you wear a bicycle helmet?



Separated by age and sex (Always/Mostly)



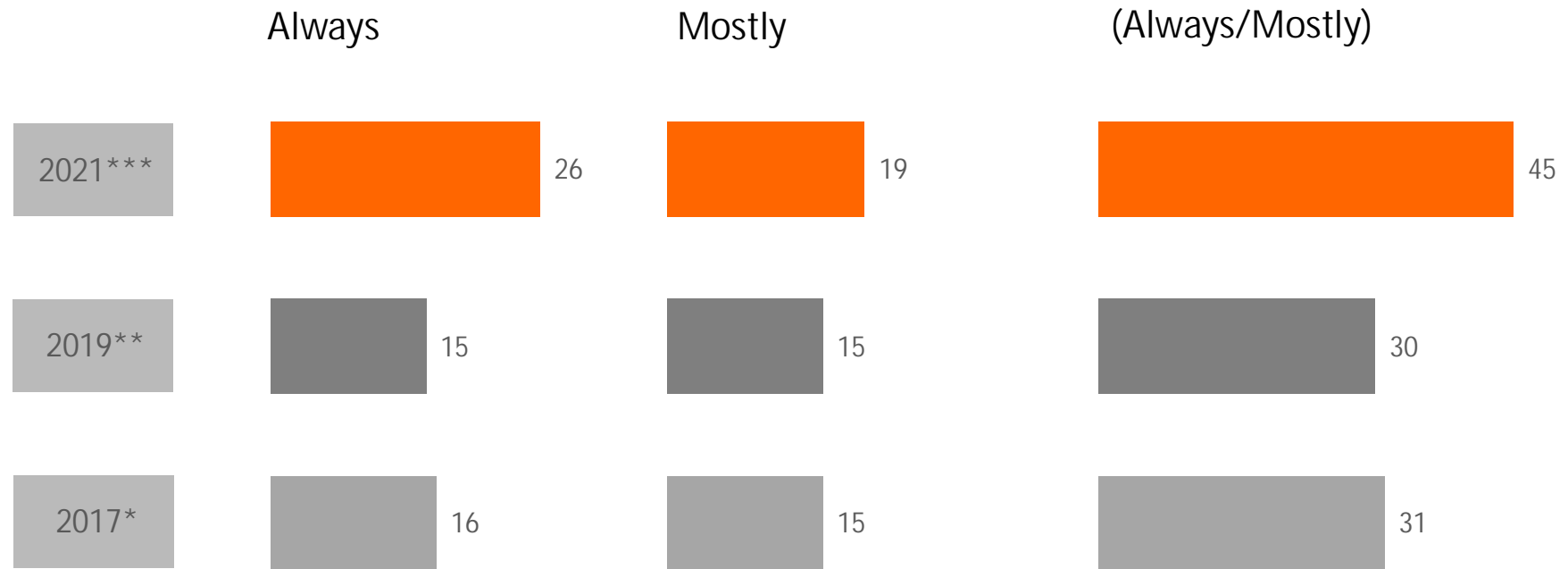
Figures in percent

N = 2,397; cyclists

Wearing of helmets

Time comparison survey 2021 – 2019 – 2017

Do you wear a bicycle helmet?



Figures in percent

Please note: Because of refined sampling, comparability of the different surveys is limited. Maximum range of variation: 4%

***N = 2,397 cyclists

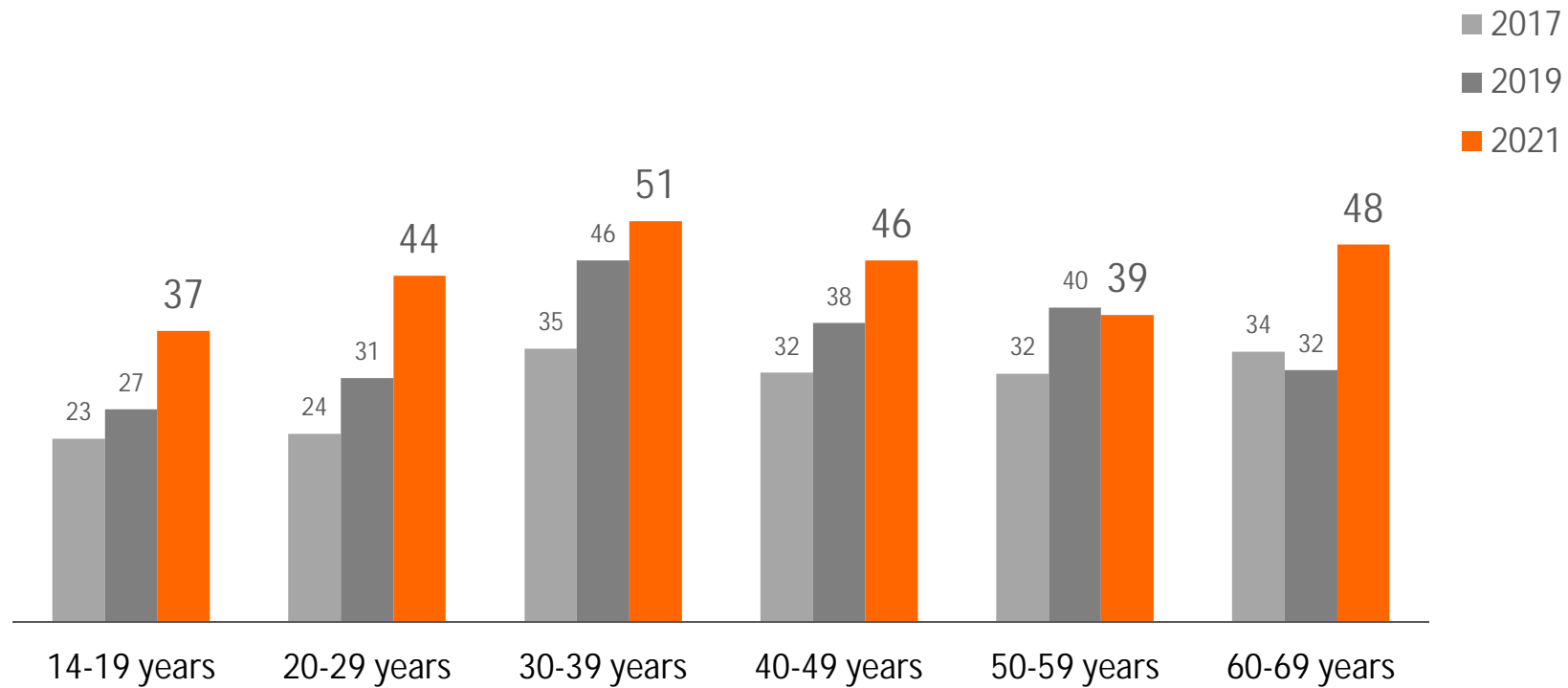
**N = 2,376 cyclists

*N = 2,440 cyclists

Wearing of helmets

Time comparison survey 2021 – 2019 – 2017 by age

Do you wear a bicycle helmet? – Always/Mostly



Figures in percent

Please note: Because of refined sampling, comparability of the different surveys is limited. Maximum range of variation: 4%.

***N = 2,397 cyclists

**N = 2,376 cyclists

*N = 2,440 cyclists

04

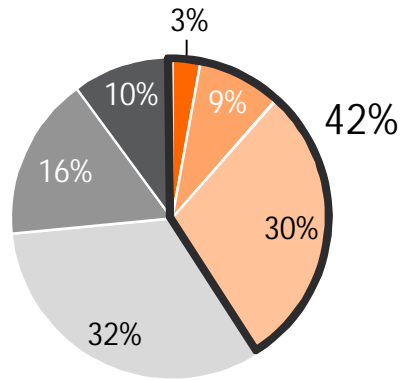
Transport policy

Cycling friendliness and wishes to politicians

Cycling friendliness of politics

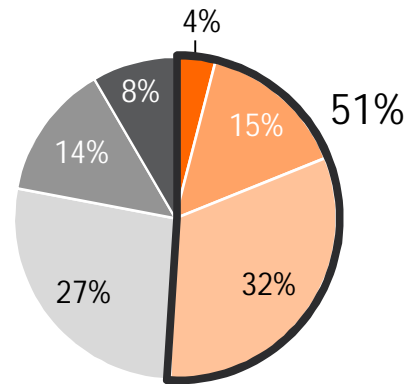
Would you consider the/your [...] to be generally cycling-friendly?

Federal Government



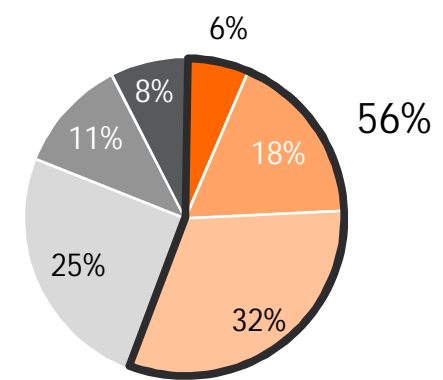
42% consider the Federal Government to be cycling-friendly.

Federal state government



51% consider their federal state government to be cycling-friendly.

Local government



56% consider their local government to be cycling-friendly.

1 – Very cycling-friendly

2

3

4

5

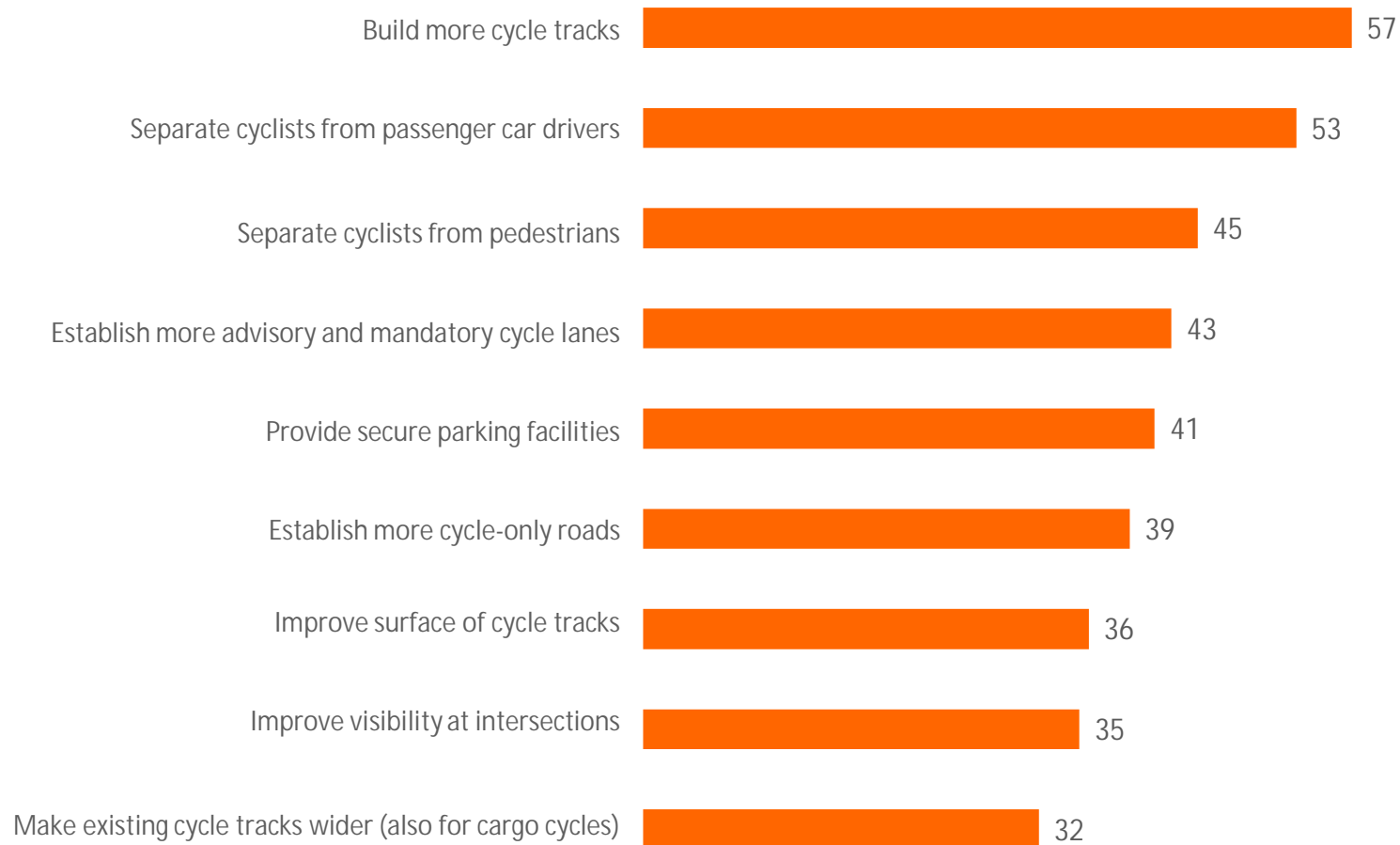
6 – Not at all cycling-friendly

N = 3,107; all respondents

Improvements for cycling (1/2)

What people want policymakers to do

In your opinion, what are the areas where policymakers at the federal, federal-state and local levels could do more for cycling? (multiple answers possible)



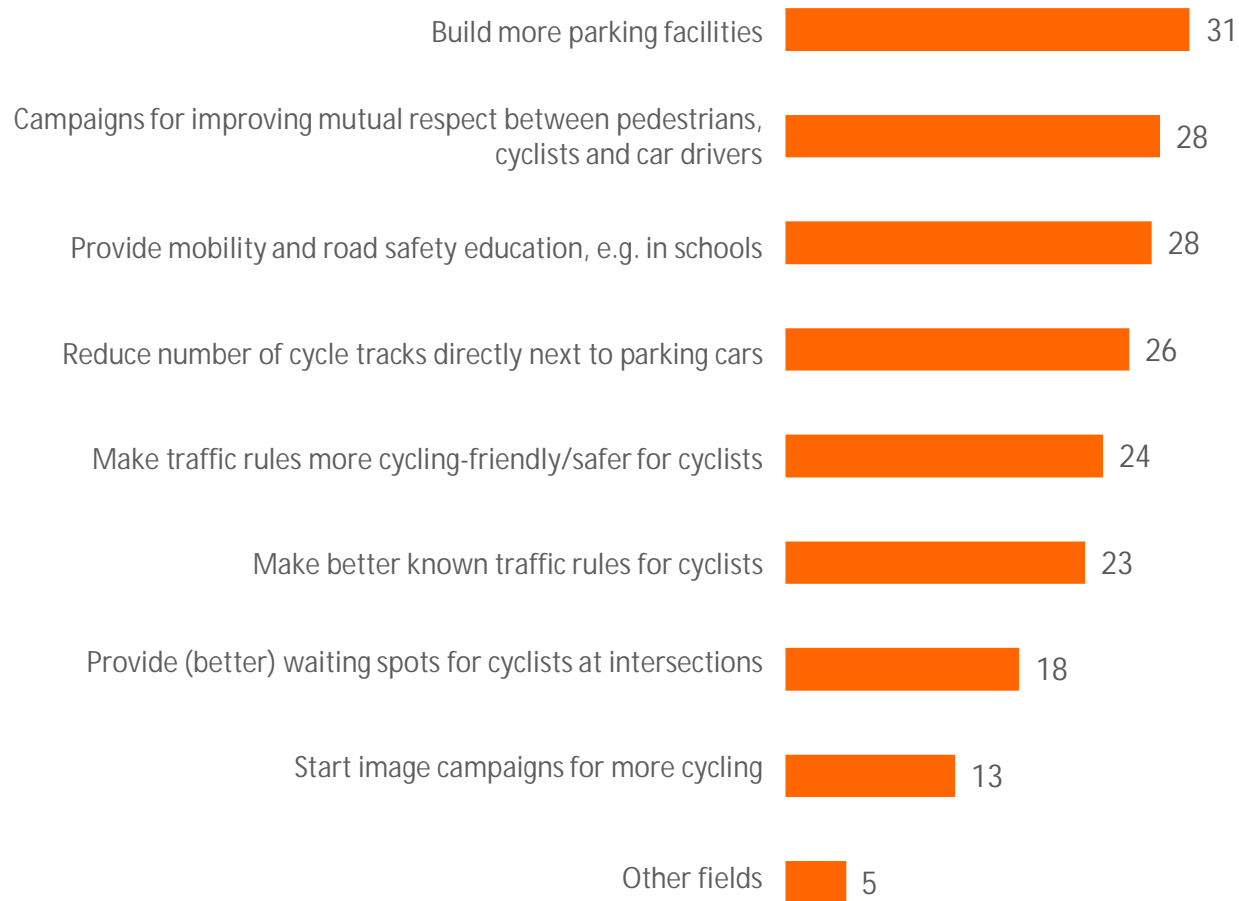
Figures in percent

N = 3,107; all respondents

Improvements for cycling (2/2)

What people want policymakers to do

In your opinion, what are the areas where policymakers at the federal, federal-state and local levels could do more for cycling? (multiple answers possible)



Figures in percent

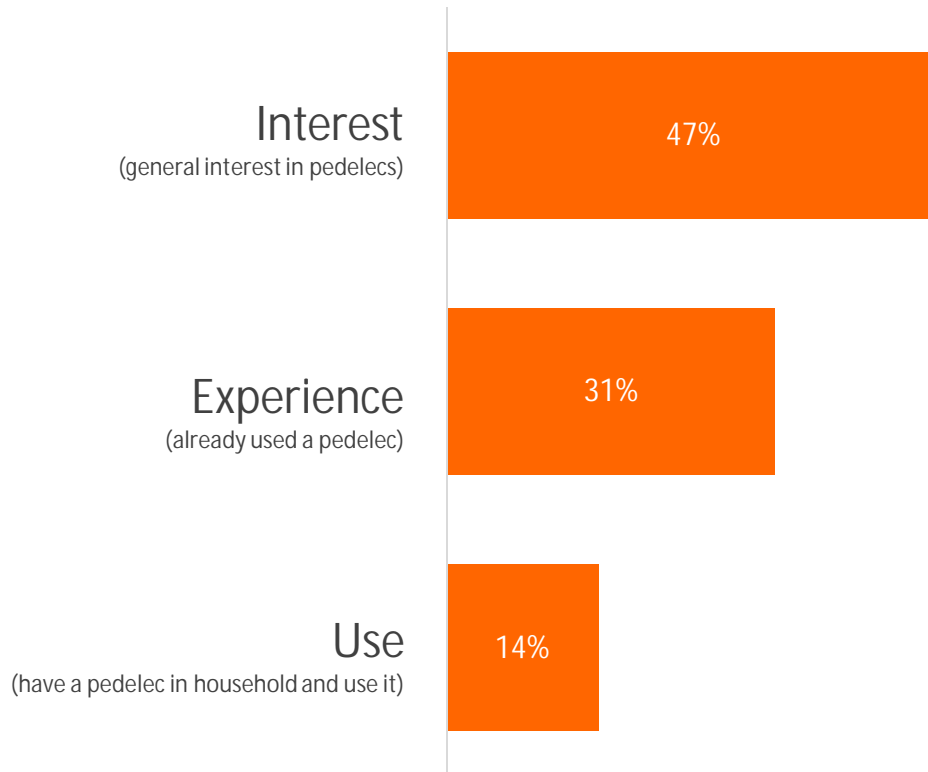
N = 3,107; all respondents

05

Innovations

Interest in and use of pedelecs, cargo cycles and cycle hire schemes

Interest in, experience with and use of pedelecs



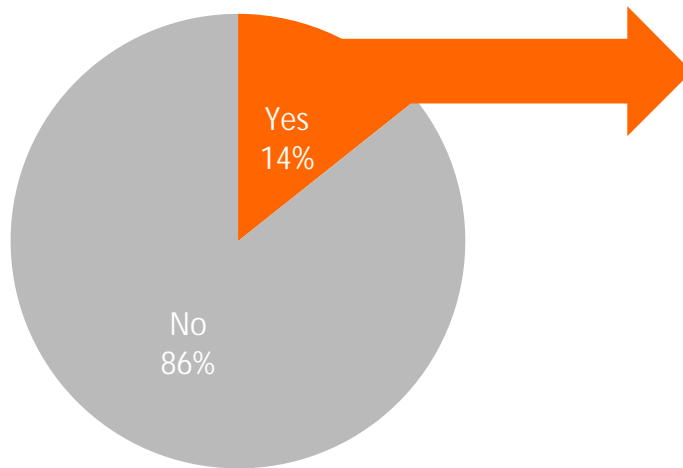
N = 3,107; all respondents

Use of pedelecs

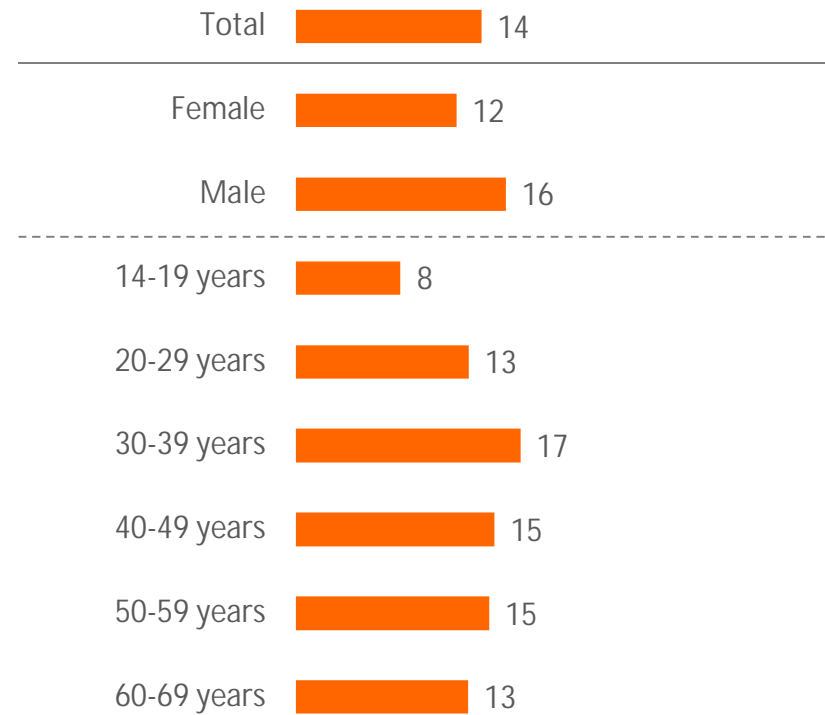
In terms of socio-demographics

Use

(have a pedelec in household and use it)



Use by gender and age

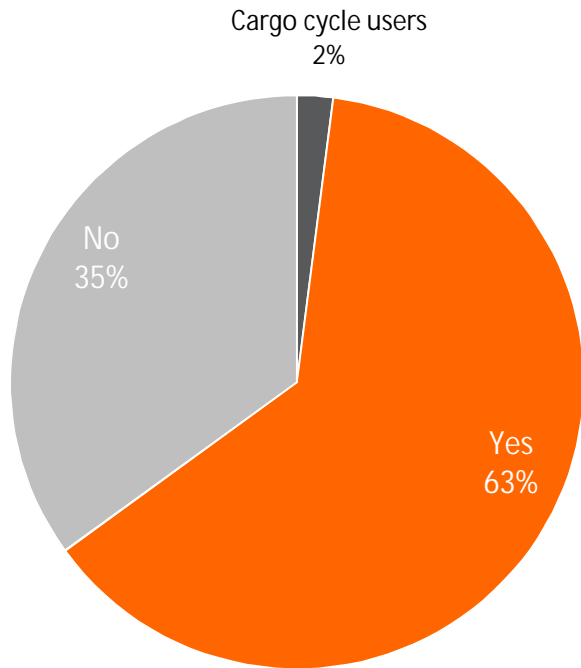


Figures in percent
N = 3,107; all respondents

Awareness and market potential of cargo bicycles

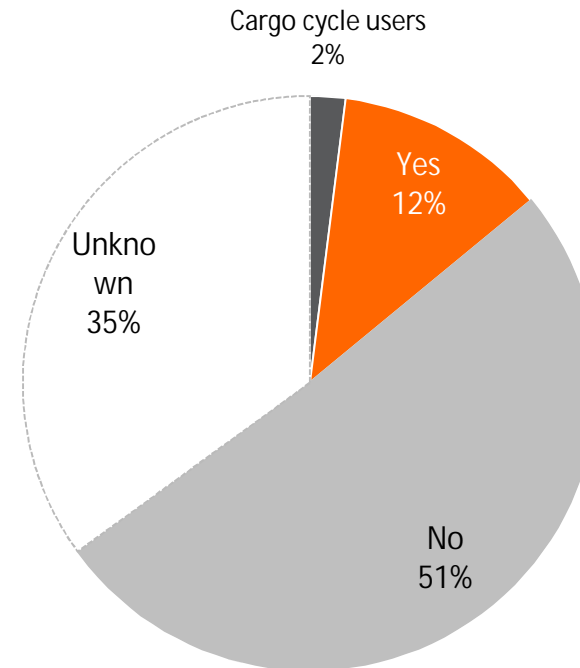
Awareness and use

Have you ever heard of cargo cycles?



Market potential

In general, could you imagine to buy a cargo cycle?



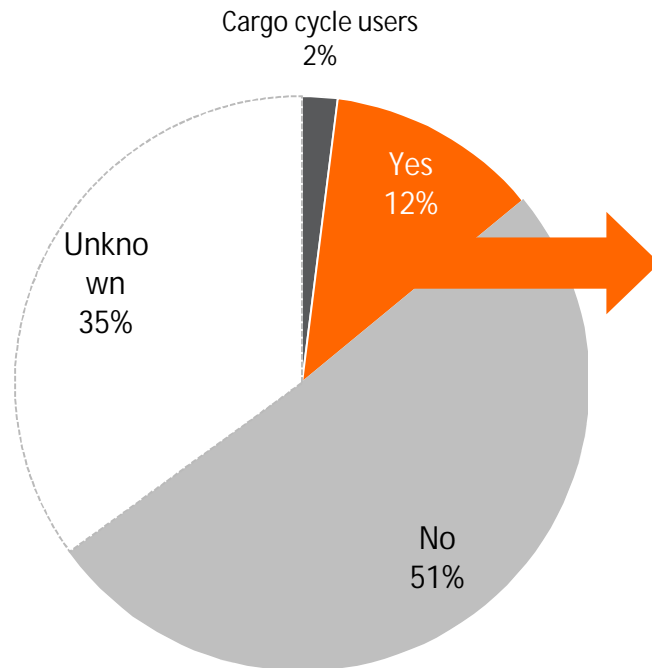
N = 3,107; all respondents

Market potential of cargo cycles

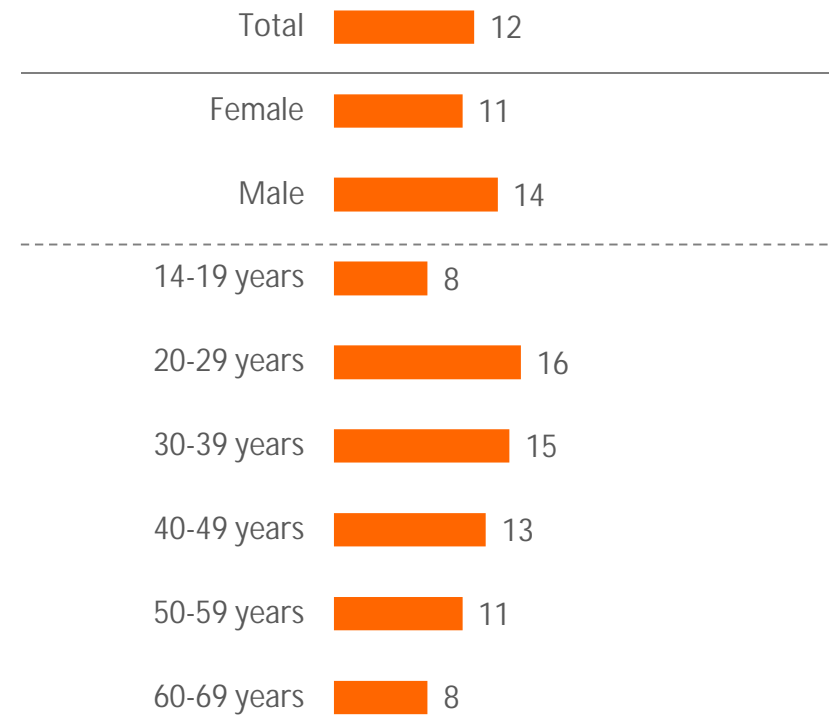
In terms of socio-demographics

Market potential

In general, could you imagine to buy a cargo cycle?



Market potential by gender and age

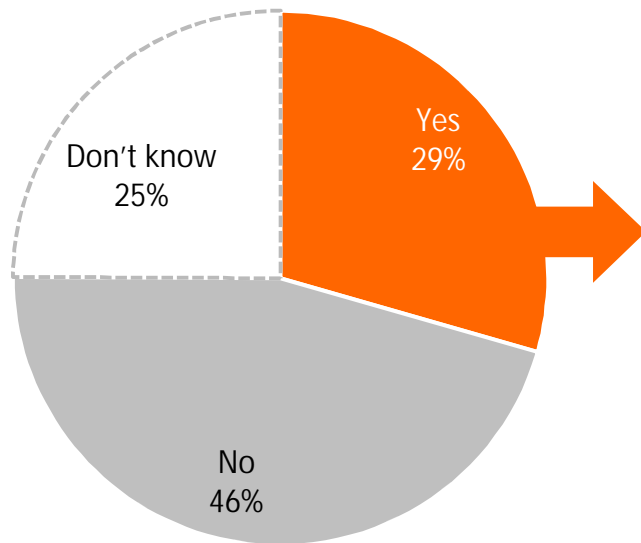


Figures in percent
N = 3,107; all respondents

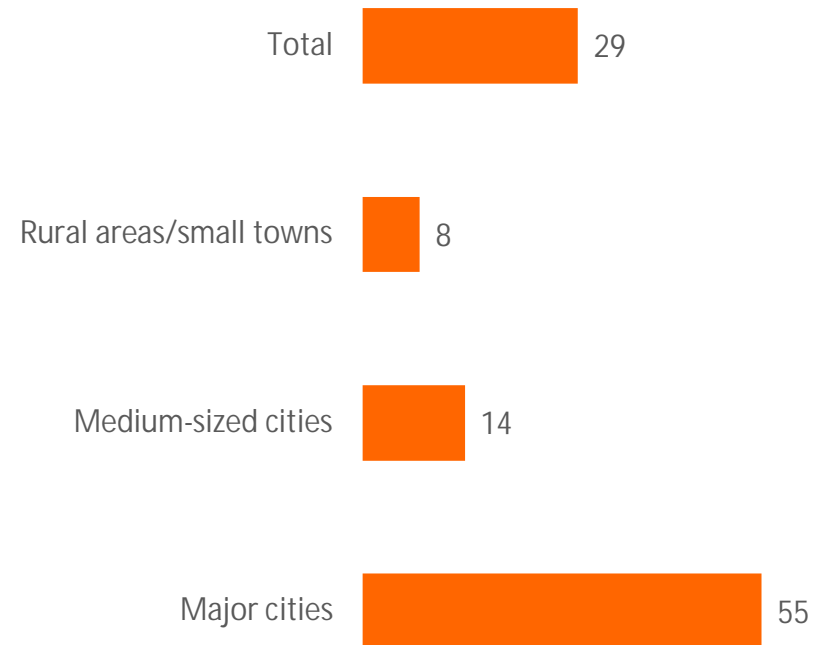
Popularity of cycle hire schemes

Popularity

Is there a bicycle hire scheme at your place of residence?



Popularity by size of town/city



Town/city size categories: rural areas/small towns: < 20.000 inhabitants, medium-sized cities: 20.000-100.000 inhabitants, major cities: > 100.000 inhabitants. Figures in percent. N = 3,107; all respondents

Frequency of use of cycle hire schemes

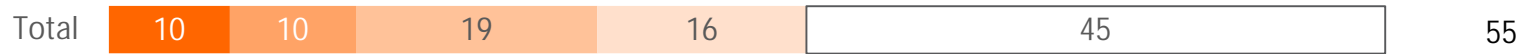
By age

Frequency of use

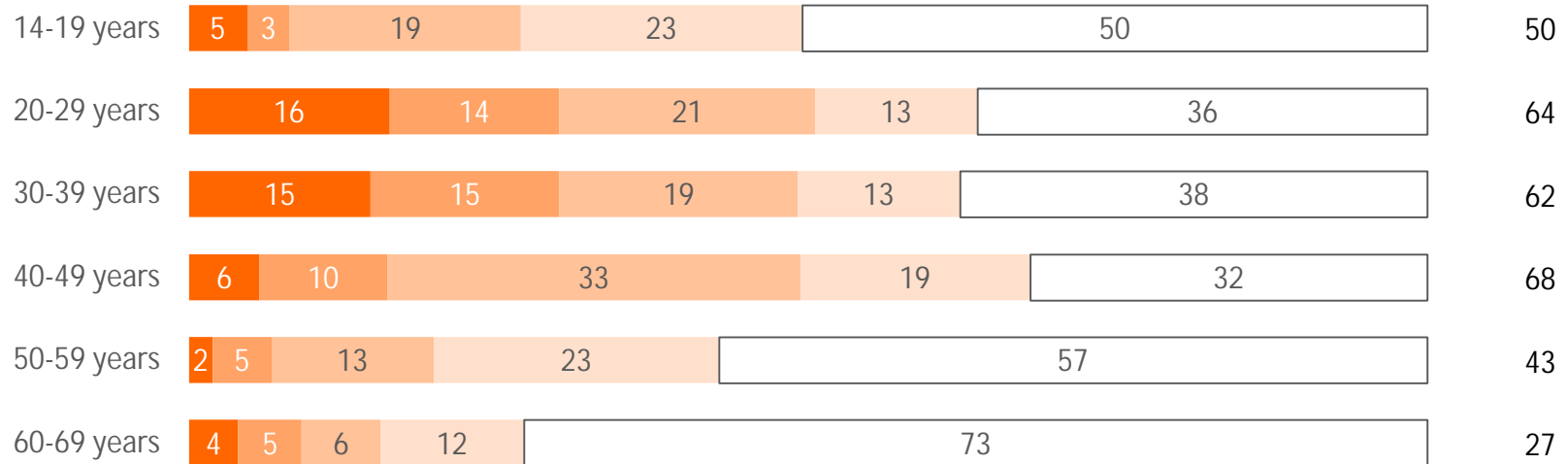
How often do you currently use a bicycle hire scheme, whether when on holiday or at your own place of residence?

This 55% correspond to 12% of the population.

■ Several times a week
 ■ A few times a month
 ■ A few times a year
 ■ Once a year
 Less frequently



Use by age



Figures in percent

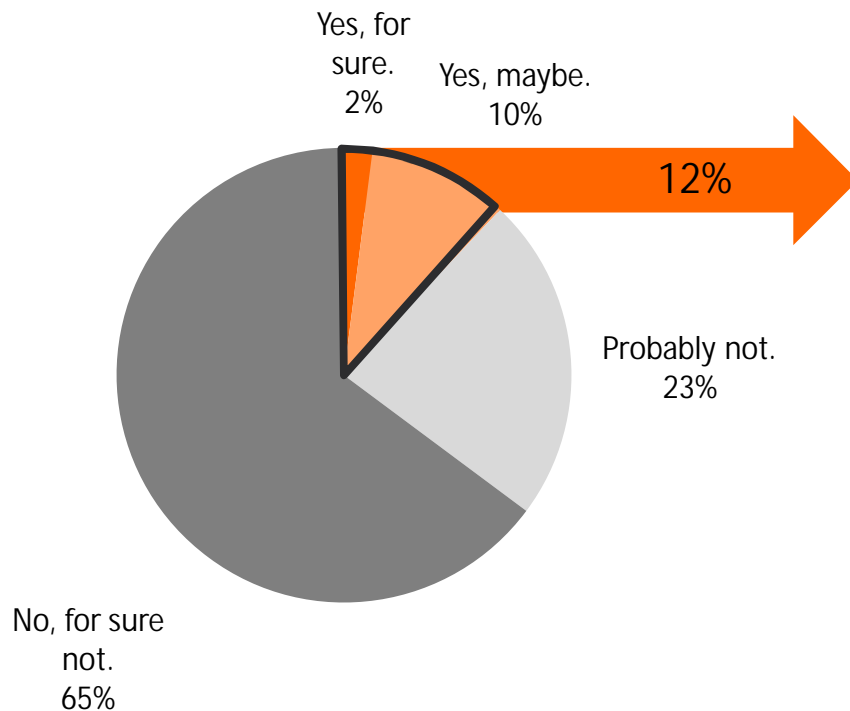
N= 667; have already used a bicycle hire scheme

Market potential of personal light electric vehicles

In terms of socio-demographics

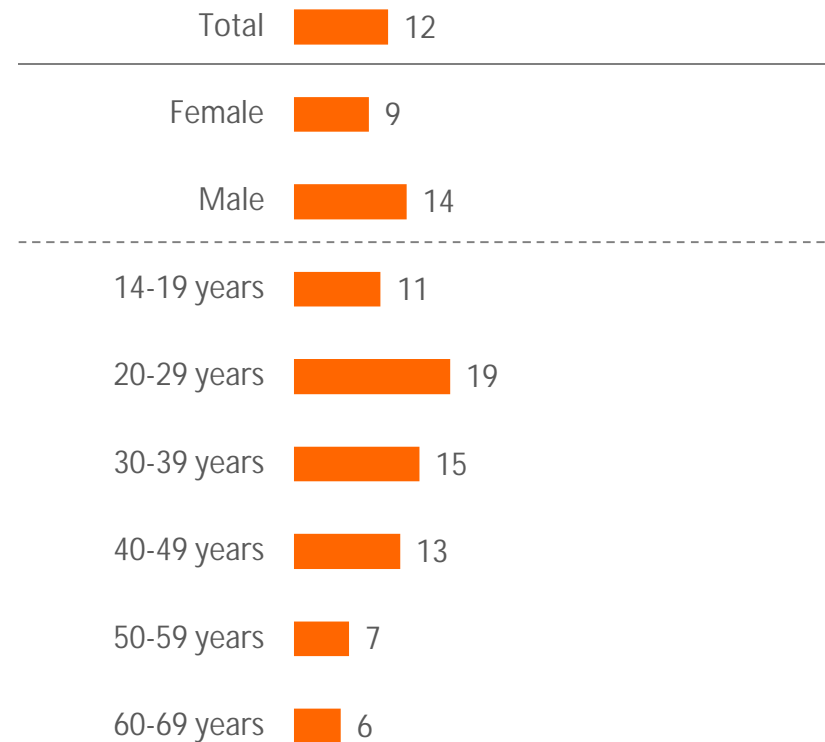
Potential

Are you planning on buying a personal light electric vehicle in the next twelve months?



Potential by gender and age

(Yes, for sure/maybe)



Figures in percent
N = 3,107; all respondents

06

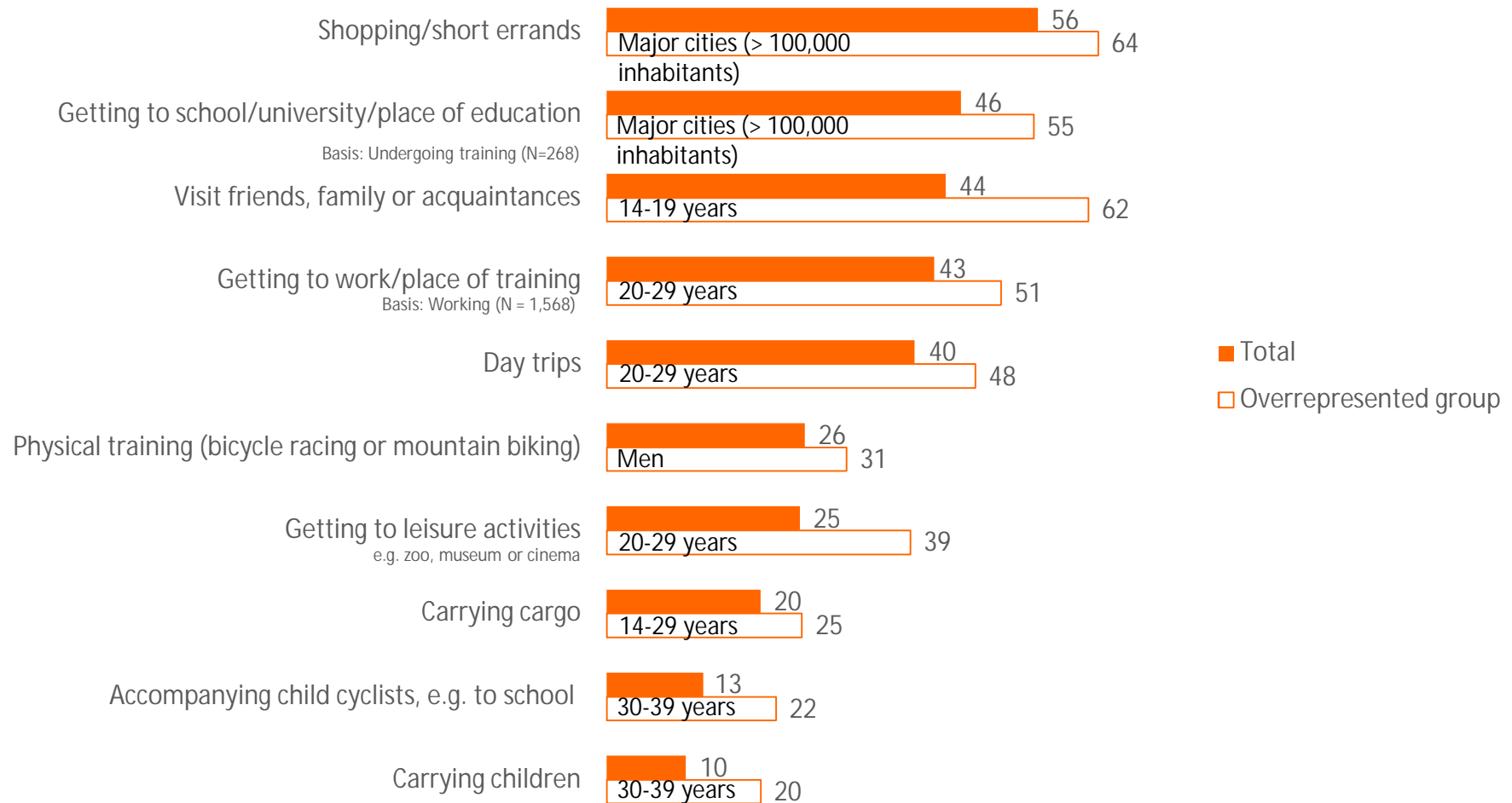
Reasons for using the bicycle

Distance travelled, bicycle commuting

Reason for using 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)

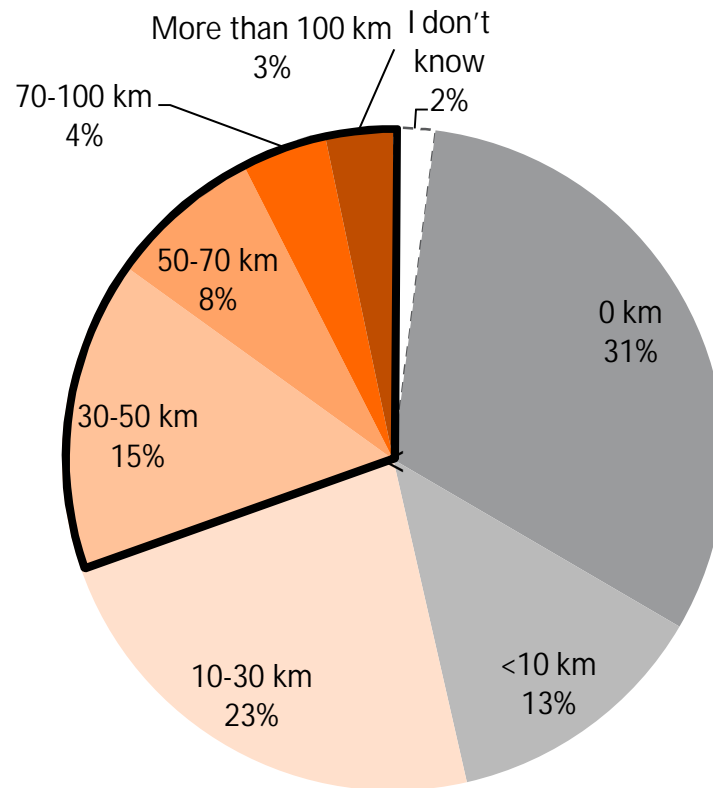


Figures in percent

N = 2,397; cyclists

Distance travelled by bicycle

How many kilometres have you travelled by bicycle in the last 7 days?



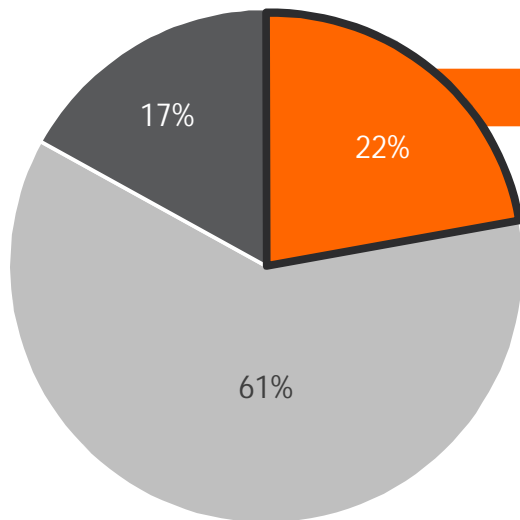
30%
travel 30 km or more a week by bicycle.

Figures in percent
N = 2,397; cyclists

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

In terms of socio-demographics

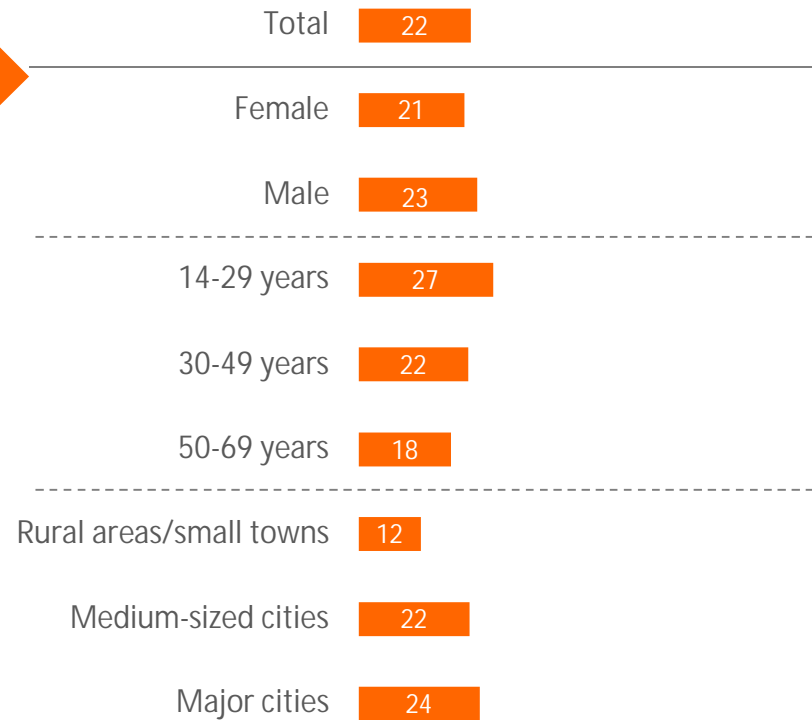
Regular use of the bicycle to get to work/place of education
(at least a few times a week)



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

N = 2,211 persons who are working or undergoing training

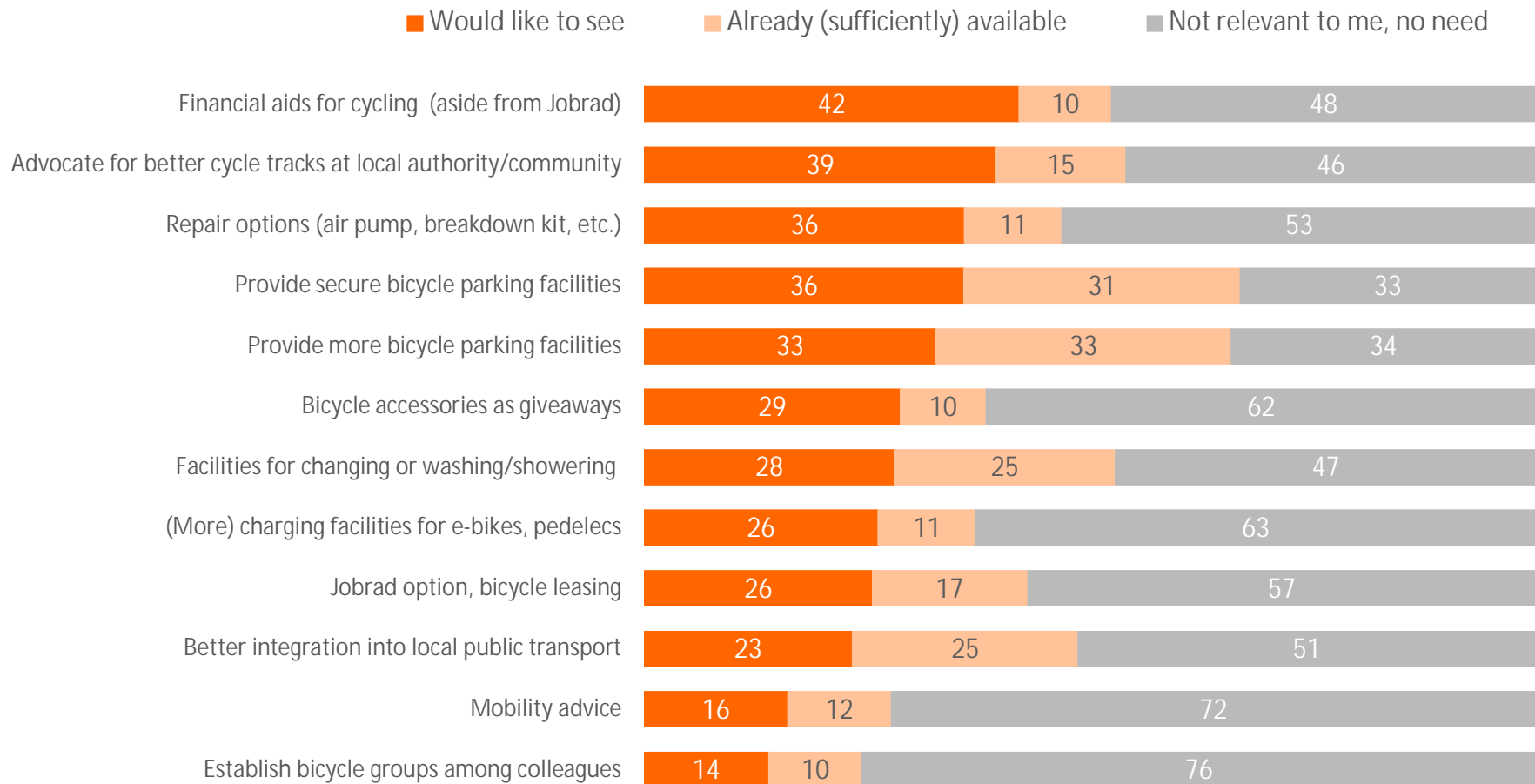
Bicycle commuters
by gender, age, size of town/city



Town/city size categories: rural areas/small towns: < 20.000 inhabitants, medium-sized cities: 20.000-100.000 inhabitants, major cities: > 100.000 inhabitants

Requests to employer/place of education

What could your employer/place of education do to make cycling to work/training (even) more attractive for you?



Figures in percent

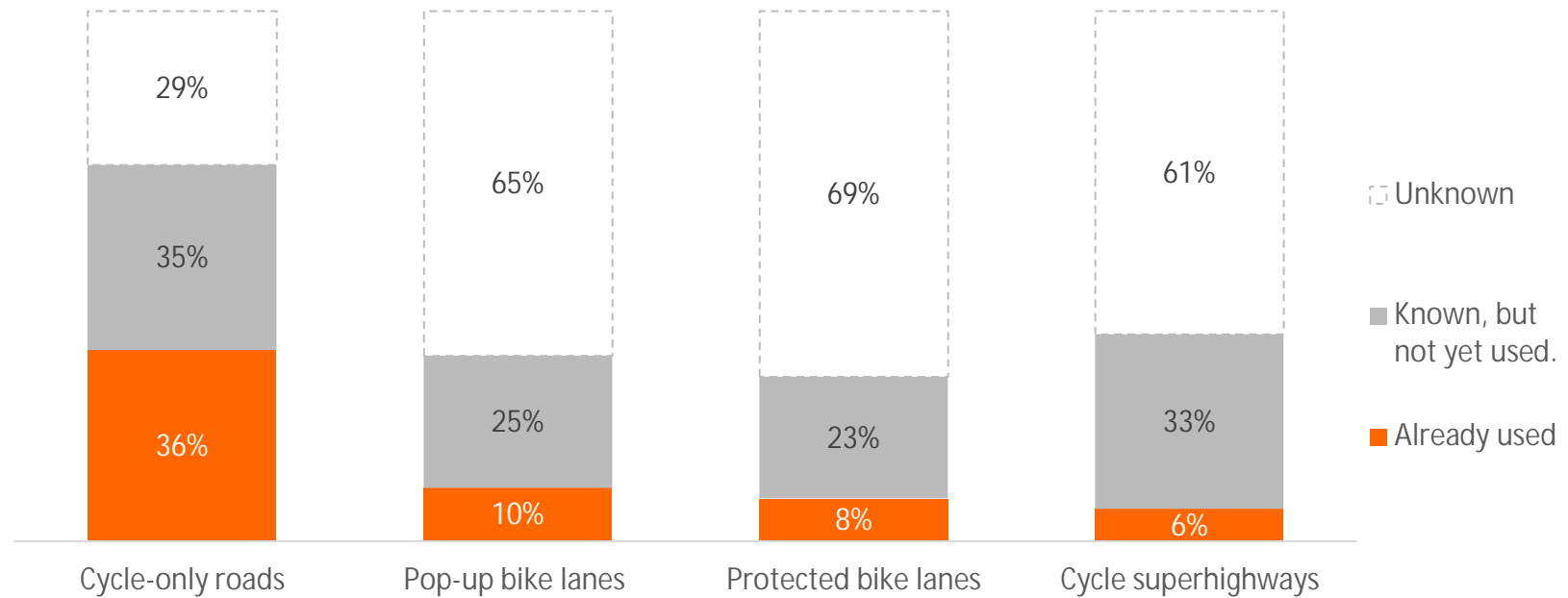
N= 2,211; employed or undergoing training

07

Cycling infrastructure

Cycle-only roads, pop-up bike lanes, protected bike lanes and cycle superhighways

Experience with innovative cycling infrastructure

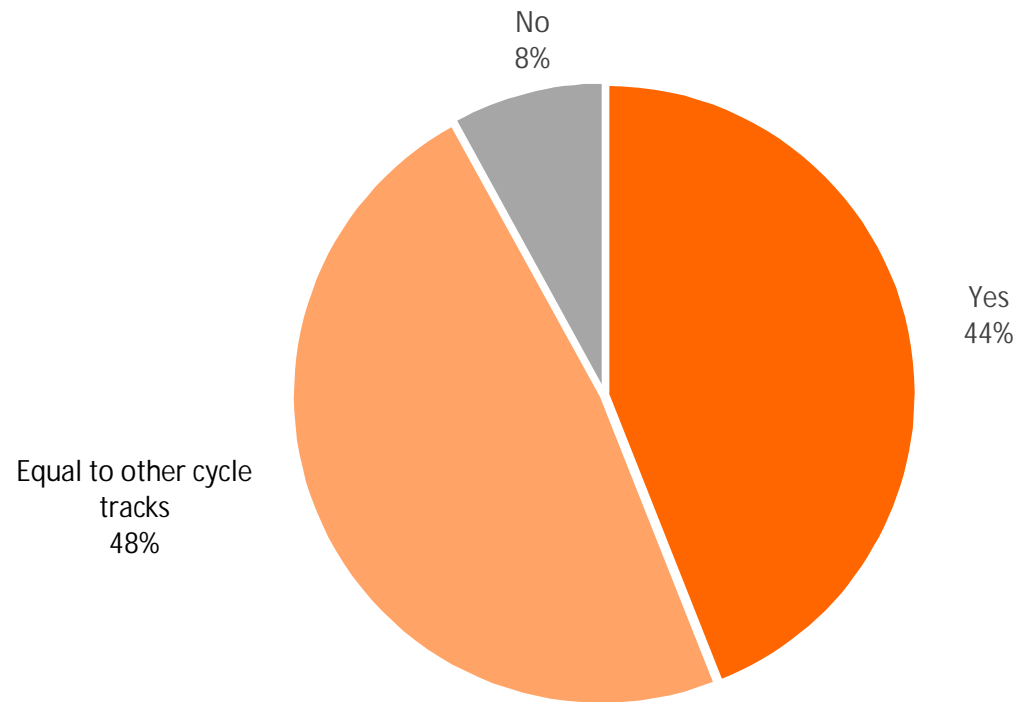


Unknown
 Known, but not yet used.
 Already used

N = 3,107; all respondents

Preference of cycle-only roads over other cycle tracks

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

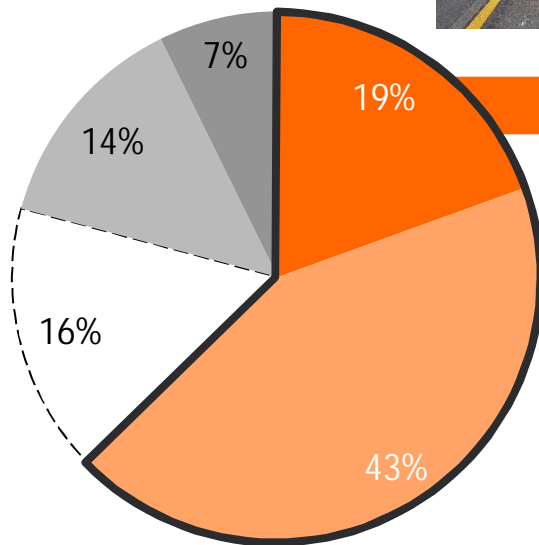


N= 1,022; respondents who have already used a cycle-only road

Assessment of temporary cycle tracks ("pop-up cycle tracks")

In terms of socio-demographics

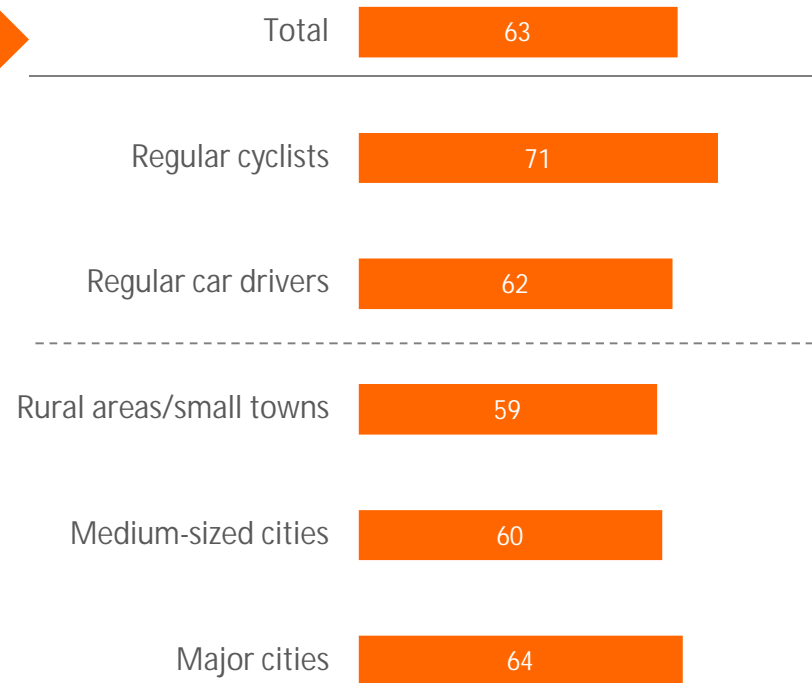
What do you think of the fact that some municipalities have set up such cycle tracks (pop-up cycle tracks)?



■ Very positive
□ Don't know
■ Rather negative
■ Rather positive

Positive assessment by users of means of transport and size of town/city

(Very positive/rather positive)

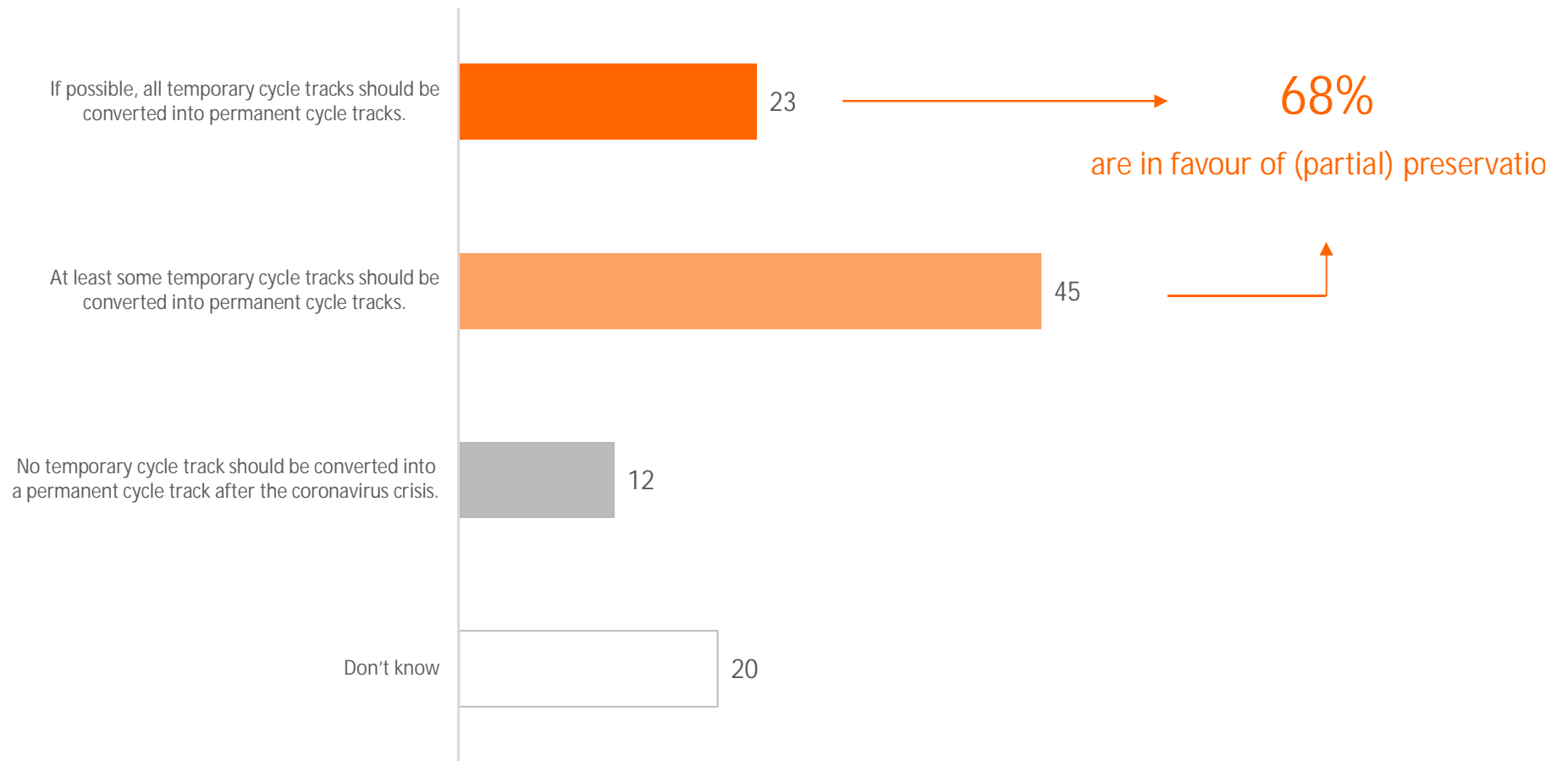


Figures in percent

Town/city size categories: rural areas/small towns: < 20.000 inhabitants, medium-sized cities: 20.000-100.000 inhabitants, major cities: > 100.000 inhabitants

Making temporary cycle tracks (pop-up cycle tracks) permanent

Temporary cycle tracks are to be preserved or converted into permanent cycle tracks so that they can also be used after the coronavirus crisis. What do you think of this?



Figures in percent

N = 3,107; all respondents

08

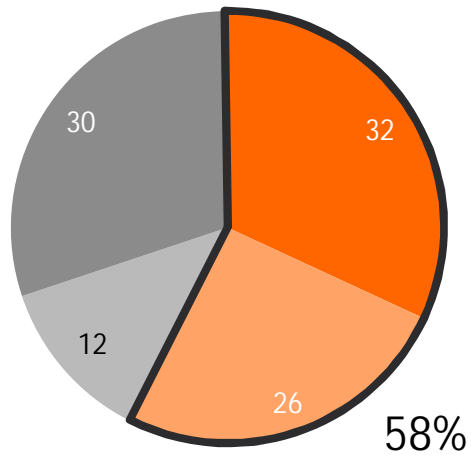
Cycling tourism

Cycling holidays and long-distance routes in Germany

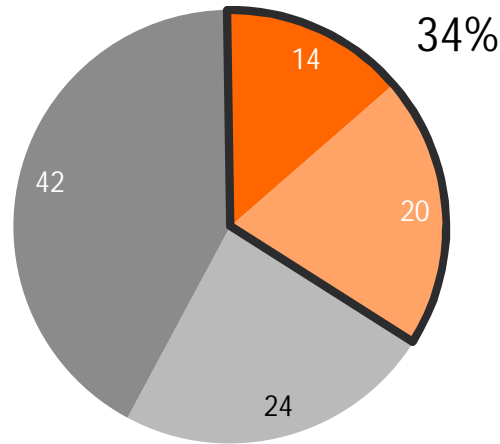
Cycling trips and cycling holidays – Potentials

Would you consider using the bicycle for a day trip, short holiday or longer vacation?

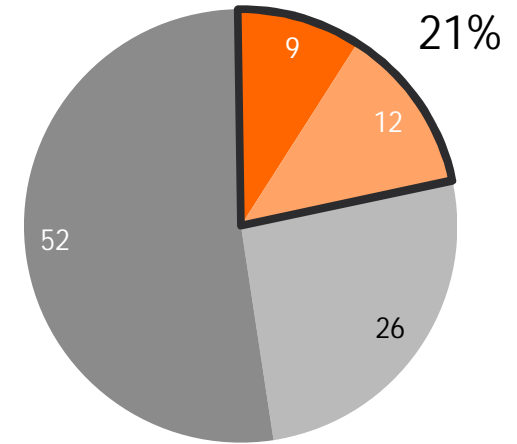
■ On any account
 ■ Probably
 ■ Rather not
 ■ On no account



Day trip
without overnight stay



Short holiday
1 to 3 overnight stays



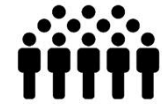
Longer vacation
4 or more overnight stays

Figures in percent

N = 3,107; all respondents

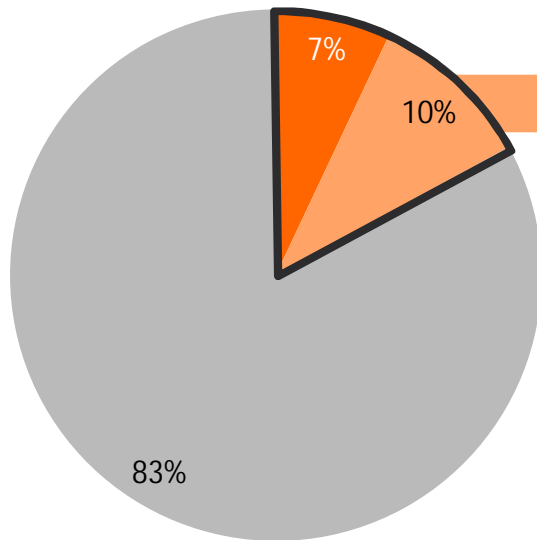
Cycling holidays – plans for 2021

In terms of socio-demographics



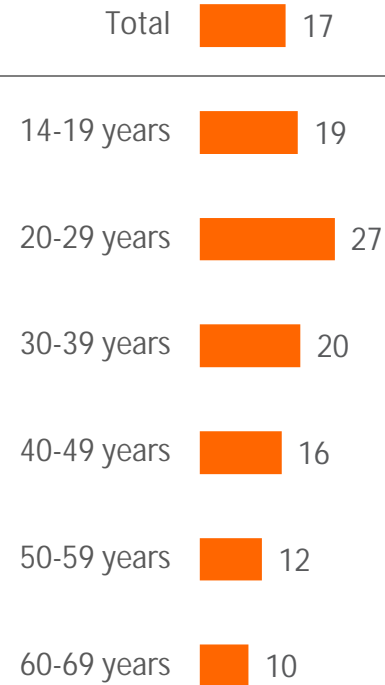
This corresponds to **around 11.2 million** cyclists going on cycling holidays in 2021 (including children)

Are you planning a short trip or a longer vacation with the bicycle this year?
(one or more overnight stays)



- Yes, know where/already booked
- Yes, but no concrete plans yet
- No, not an option in general

Plans by age groups



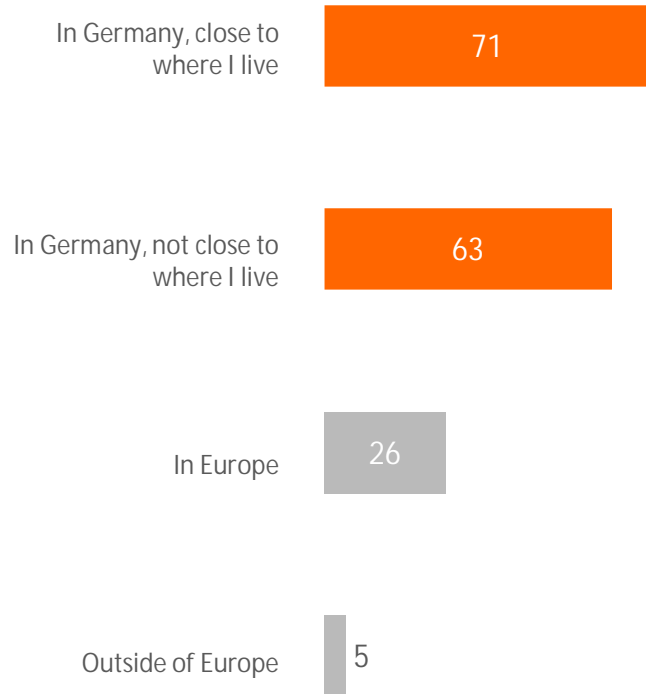
N= 3,107; all respondents

Figures in percent

Cycling holidays – potential destinations

Regions

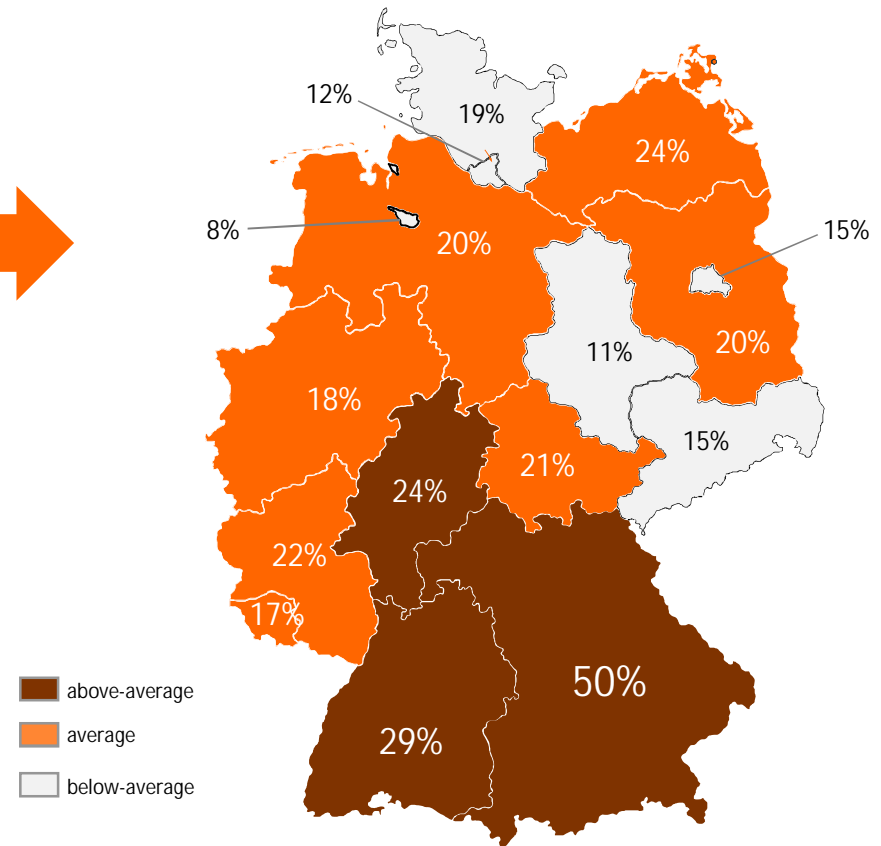
Which of these regions would you consider for cycling holidays (one or more overnight stays) this year? (multiple answers possible)



N = 1,111; respondents who can imagine to go on a short or longer cycling holiday
Figures in percent

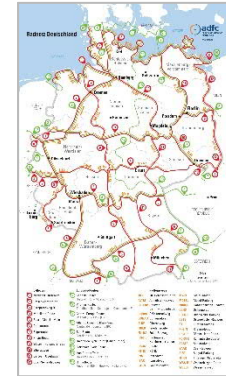
Federal states

Which of these federal states would you consider for cycling holidays (one or more overnight stays) this year? (multiple answers possible)

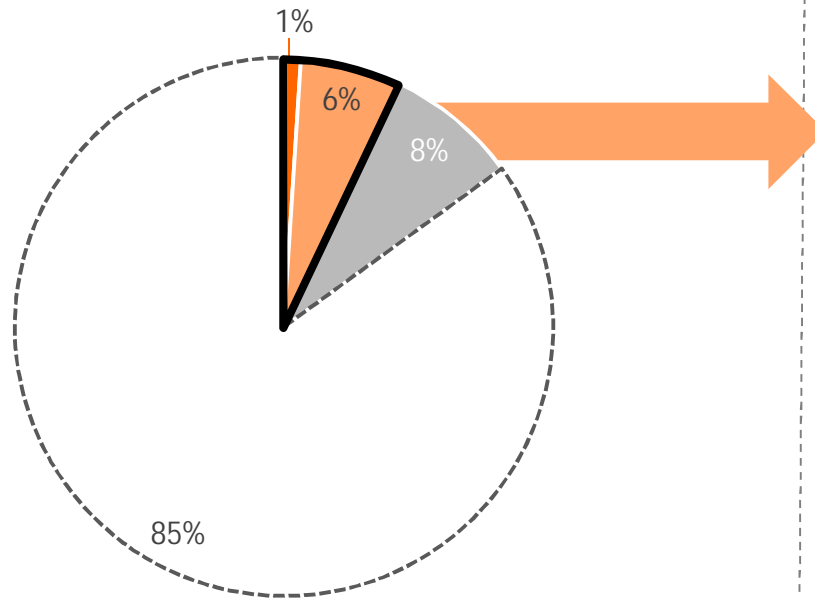


N= 1,050; respondents who are considering a cycling holiday (one or more overnight stays) this year in Germany

Use of long-distance routes in Germany



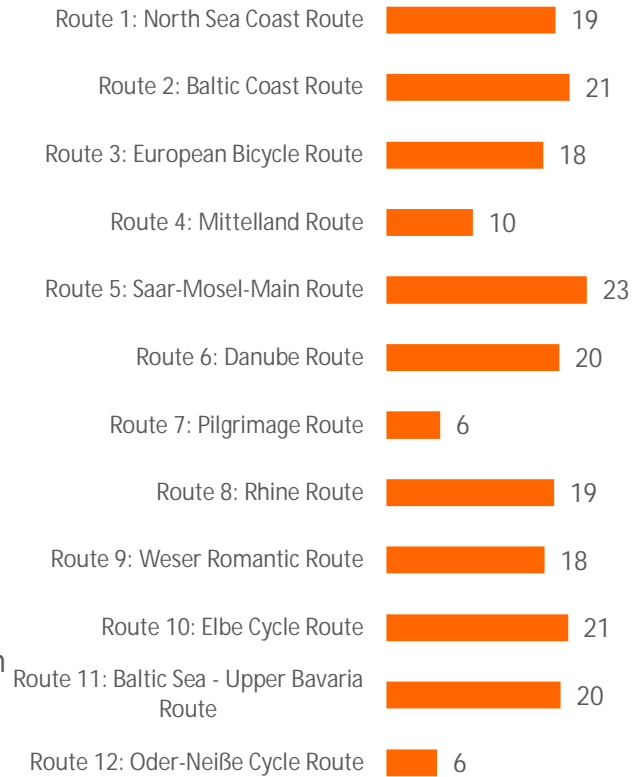
Have you ever used a long-distance cycling route (D-Netz) in Germany?



■ Yes, one or more complete routes.
 ■ Yes, partially.
 ■ No
 ■ Unknown

N = 3,107; all respondents

Which of the D-Netz routes have you already used? (more than one answer possible)



Figures in percent

N= 217; persons who have already cycled on a long-distance D-Netz route

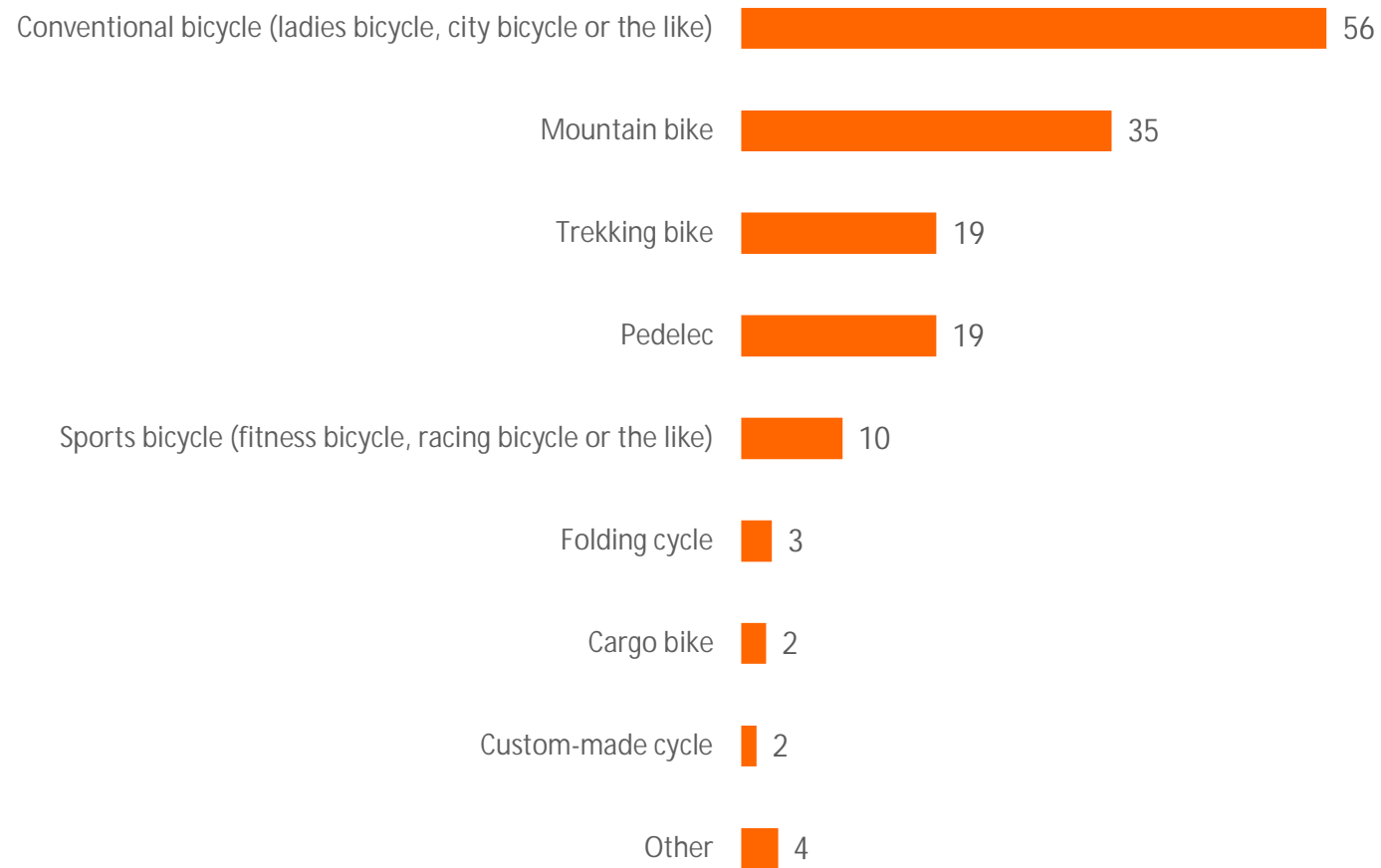
09

Bicycle market

Types of bicycles and plans to buy a bicycle

Type of bicycle used

What type of bicycle or what types of bicycles do you personally use? (multiple answers possible)



Figures in percent

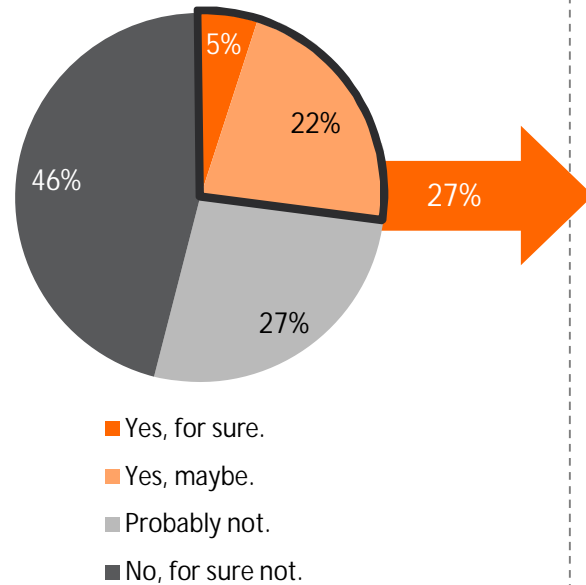
N = 2,397; cyclists

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?
3. How much will you probably spend on this bicycle including accessories? (aggregate of all types of bicycles)

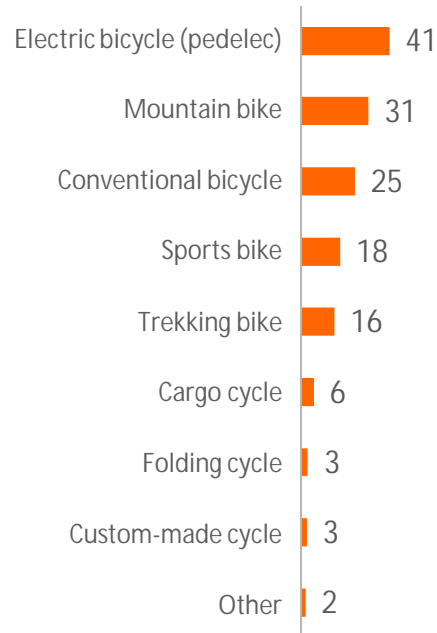
1. Planned purchase



Figures in percent

N = 3,107; all respondents

2. Type(s) of bicycles (multiple answers possible)



3. Budget



N= 826 persons who are planning on buying a new bicycle in the next twelve months

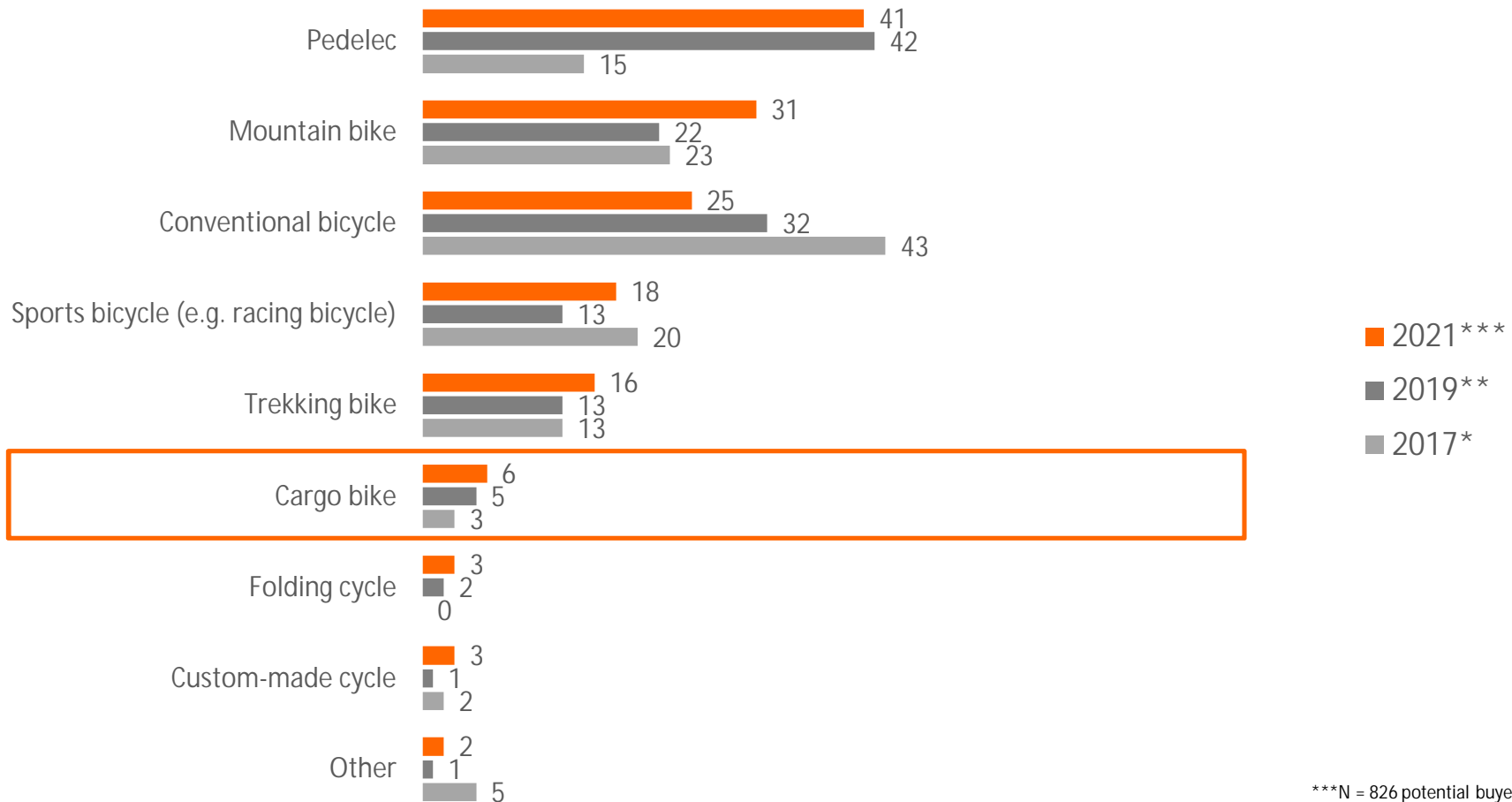
Plans to buy a bicycle – type of bicycle

Time comparison survey 2021 – 2019 – 2017



This corresponds to approx. **920,000** new cargo cycles per annum.

What type of bicycle or what types of bicycles will you most probably buy? (multiple answers possible)



Figures in percent

Please note: Because of refined sampling, comparability of the different surveys is limited. Maximum range of variation: 4%.

***N = 826 potential buyers

**N= 924 potential buyers

*N= 925 potential buyers

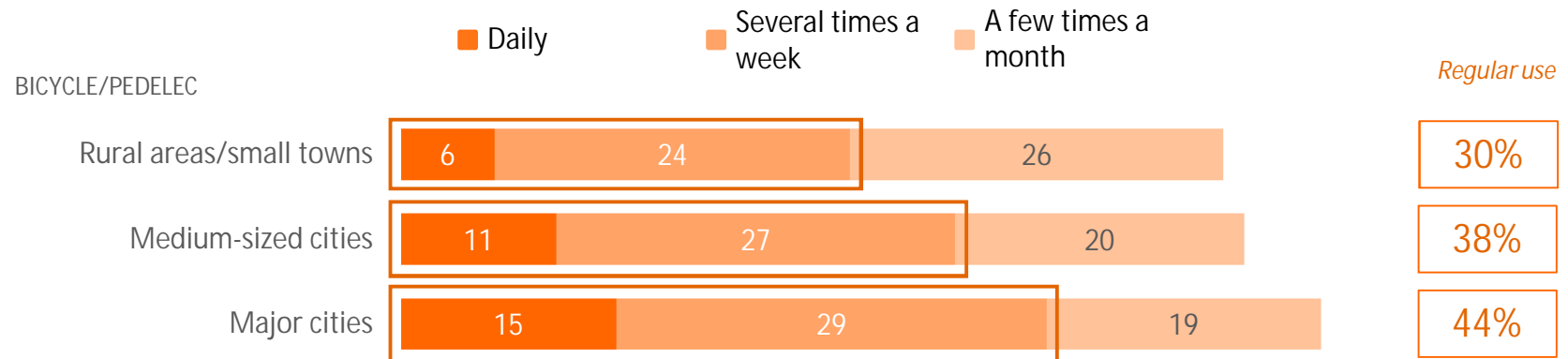
10

Comparison: cyclists in rural vs. cyclists in urban areas

Frequency of bicycle use

Rural vs. urban areas

How often do you use the bicycle/pedelec?



Figures in percent

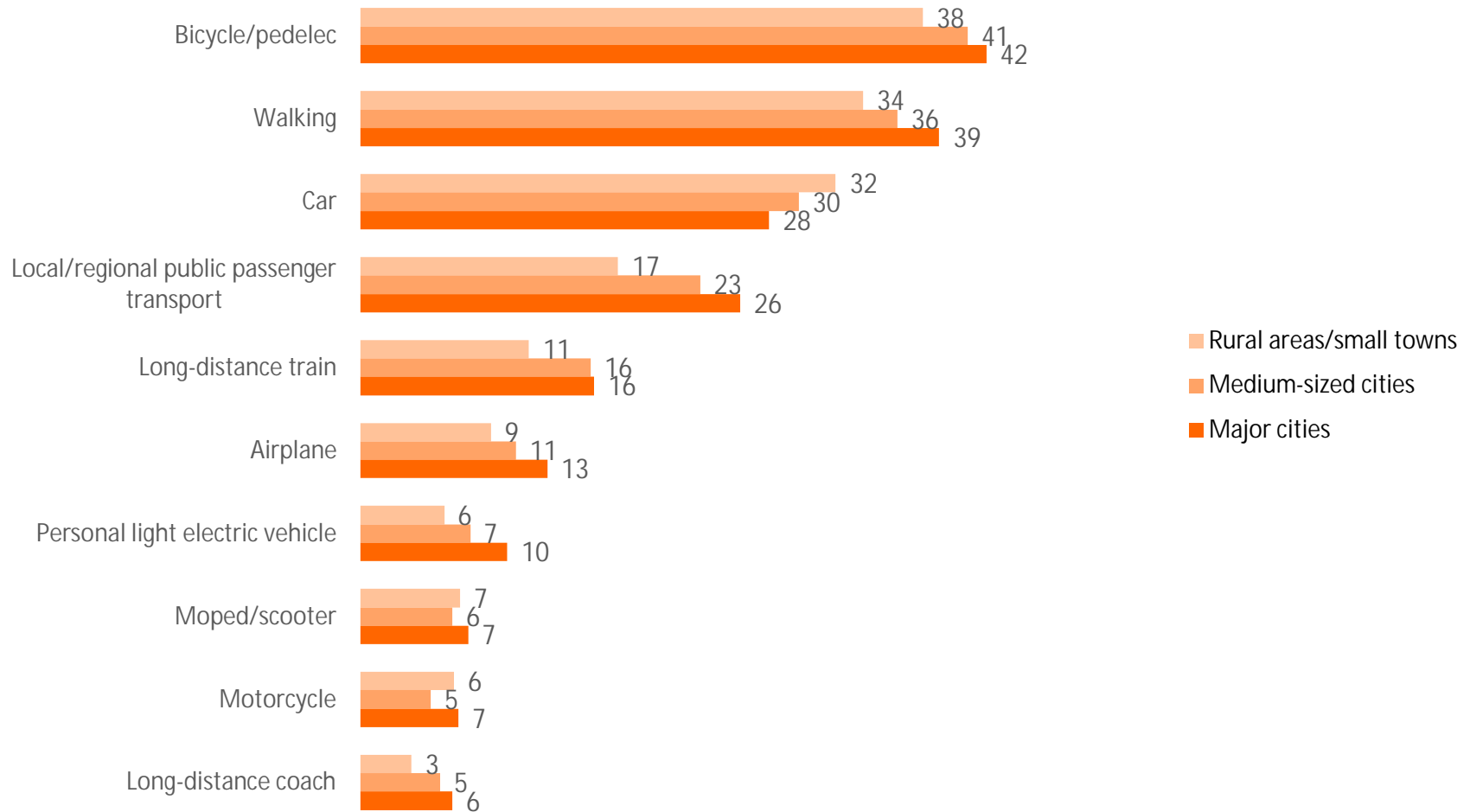
Town/city size categories: rural areas/small towns: < 20.000 inhabitants, medium-sized cities: 20.000-100.000 inhabitants, major cities: > 100.000 inhabitants

N = 3,107; all respondents

Greater use of the different means of transport in the future

Rural vs. urban areas

Which of these means of transport would you like to use more frequently in the future? (multiple answers possible)



Figures in percent

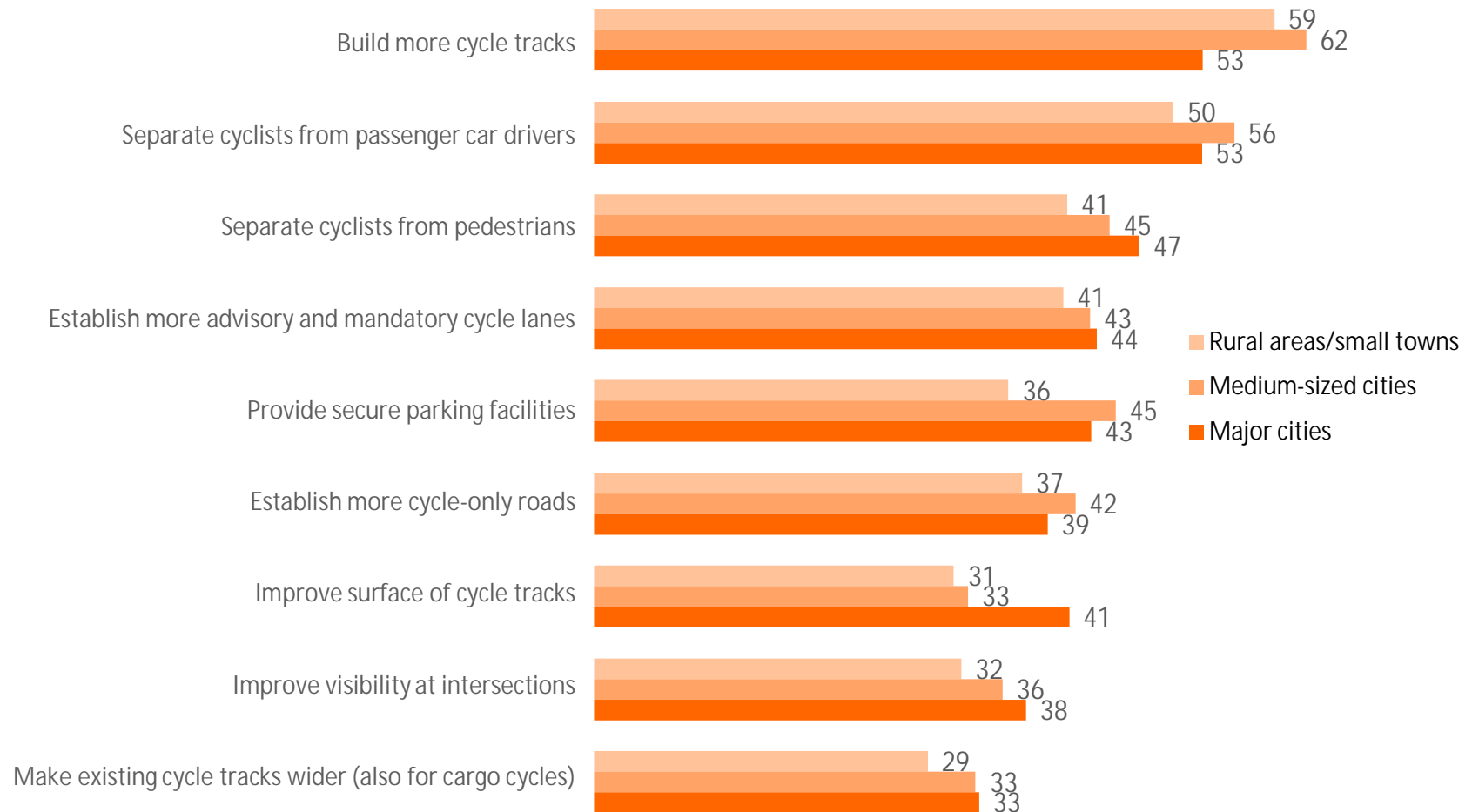
Town/city size categories: rural areas/small towns: < 20.000 inhabitants, medium-sized cities: 20.000-100.000 inhabitants, major cities: > 100.000 inhabitants

N = 3,107; all respondents

Improvements for cycling (1/2)

Rural vs. urban areas

In your opinion, what are the areas where policymakers at the federal, federal-state and local levels could do more for cycling? (multiple answers possible)



Figures in percent

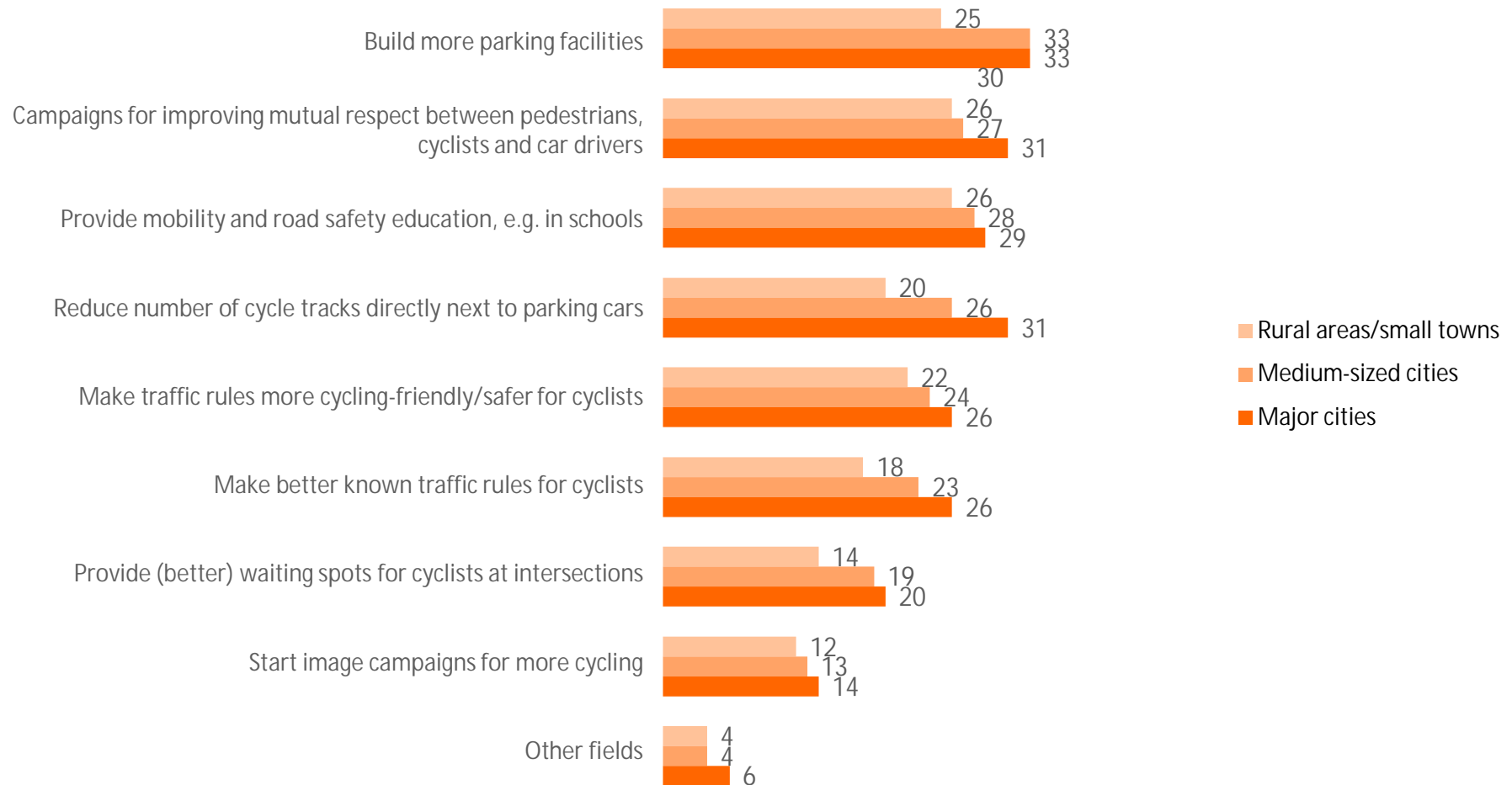
Town/city size categories: rural areas/small towns: < 20.000 inhabitants, medium-sized cities: 20.000-100.000 inhabitants, major cities: > 100.000 inhabitants

N = 3,107; all respondents

Improvements for cycling (2/2)

Rural vs. urban areas

In your opinion, what are the areas where policymakers at the federal, federal-state and local levels could do more for cycling? (multiple answers possible)



Figures in percent

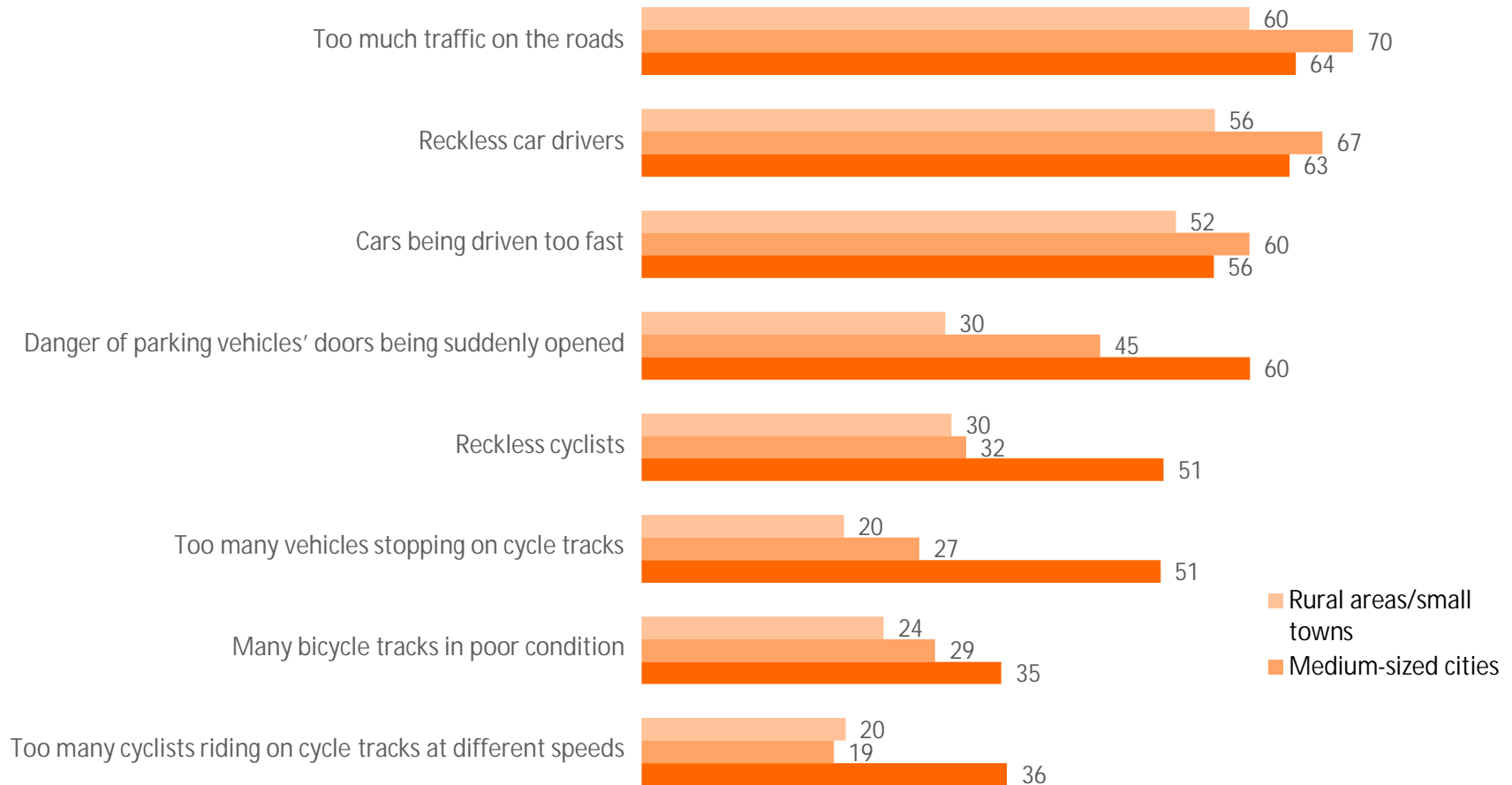
Town/city size categories: rural areas/small towns: < 20.000 inhabitants, medium-sized cities: 20.000-100.000 inhabitants, major cities: > 100.000 inhabitants

N = 3,107; all respondents

Reasons for not feeling safe

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

Why do you feel (rather) not safe? (multiple answers possible)



Figures in percent

N= 875: cyclists who feel (rather) not safe on the bicycle

Town/city size categories: rural areas/small towns: < 20.000 inhabitants, medium-sized cities: 20.000-100.000 inhabitants, major cities: > 100.000 inhabitants

Summary: Rural vs. urban areas

Overview of the most significant differences

	In rural areas/small towns (up to 20,000 inhabitants)	In mid-sized towns (20,000 to 100,000 inhabitants)	In major cities (100,000 inhabitants or more)
Means of transport that will be used more frequently in the future*	Car (32%)	Car (30%)	Bicycle (31%)
Regular bicycle use (at least several times a week)	31%	38%	44%
Most common reason for cyclists to not feel safe* (Basis: cyclists who have stated to not feel safe)	Too much traffic on the roads (60%)	Too much traffic on the roads (70%)	Too much traffic on the roads (64%)
Most common type of road used by cyclists* (Basis: cyclists)	Carriageway without cycle lane (53%)	Separate footway/cycle track on sidewalk (48%)	Separate footway/cycle track on sidewalk (57%)
Feeling of safety on this type of road	75% do not feel safe	7% do not feel safe	6% do not feel safe
Regular use of bicycle helmets (Basis: cyclists)	49%	44%	41%
Cycling in my municipality/city is fun	55%	54%	53%
Bicycle hire scheme available	8%	14%	55%
Interest in pedelecs	48%	48%	44%
Cargo cycle potential	11%	10%	14%

* refers to the most frequently given response in each case

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