2019 Cycling Monitor Germany

Selected results

Last update: January 07th, 2020
Key findings

Availability and use of means of transport

- 76 percent of German households have at least one bicycle (without electrical assistance) and 14 percent have a pedelec.

- 44 percent of the persons surveyed regularly – i.e. daily or several times a week – use the bicycle or pedelec as means of transport and/or during leisure time.
  
  - The youngest age group (14-19 years) most frequently uses the bicycle, followed by the group of 20-29 year-olds; with increasing age, the usage decreases gradually.

- The trend in terms of bicycle use is positive. In comparison with 2017, regular use of the bicycle has increased by 3 percentage points and by 6 percentage points when compared to 2015.

- The popularity of bicycles has also continued to increase from year to year.
  
  - In 2019, 65 percent stated that they enjoyed or enjoyed very much using the bicycle as a means of transport. In comparison with 2017, this is an increase of 1 percentage point, and of 10 percentage points when compared to 2015. Riding the bicycle as a leisure activity is even more popular. 70 percent of the persons surveyed stated that they enjoyed using the bicycle (very much). (2017: +7 pp, 2015: +11 pp)
  
  - The car has lost some popularity and, with 71 percent, is yet only slightly ahead of the bicycle as a leisure time activity. (2017: -4 pp, 2015: -8 pp)

- In the future, 41 percent of the persons surveyed intend to use the bicycle more often.
  
  - Among the younger ones (14-19 years), the intention is particularly strong with 63 percent.
Key findings

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

The most urgent demands on politicians with regard to bicycle traffic are:

- Build more cycle paths (60 percent)
- Better separation of cyclists from car drivers (53 percent) and pedestrians (45 percent)
- Establish more protective and mandatory cycle lanes (44 percent)
- Provide safe parking facilities (44 percent)
- Increase number of cycle-only roads (43 percent)

About half of the persons surveyed (49 percent) stated that they enjoyed cycling in their community.

The feeling of safety while cycling is increasing: 56 percent of cyclists state that they feel very or rather safe (2017: 53 percent). Accordingly, 44 percent feel less safe on their bikes.

The number of cyclists who wear a helmet has also increased from year to year – 38 percent wear headgear always or most of the time; that is 8 percentage points more than 2017.

- The youngest surveyed age group between 14 and 19 years wears a helmet the least (27 percent), the group of 30 to 39 year-olds most frequently wears one (46 percent).
Key findings

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

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

Reasons to use the bicycle and commuter potentials of cycle superhighways

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

Protected bike lanes and cycle-only roads

- About 40 percent of those surveyed have heard of the concept of "protected bike lanes", but only 7 percent have used a protected bike lane.

- Cycle-only roads are significantly better known (70 percent of the persons surveyed). About one-third has already used a cycle-only road (34 percent).

- Slightly less than half of cyclists who have already used a cycle route prefer this form of cycling compared to other cycle paths (48 percent).
Key findings
Cycle tourism and bicycle market

- 44 percent of cyclists have undertaken a bicycle tour of half a day or longer in the last two years.

- 15 percent of those surveyed know the German Cycle Network (D-routes) which comprises about 11,700 km. 8 percent have already used one or more D-routes.
  
  - The Rhine Route (20%) and the Elbe Route (17%) are the ones most frequently used.
  
  - The majority has used the D-routes during a longer bicycle tour (60 percent).

- In 2019, 31 percent of those surveyed plan to buy a new bicycle within the next 12 months. At 865 euros, the sum that each person is willing to spend is considerably higher than the average value of 2017 (+ € 184).
  
  - The choice is often made in favour of the pedelec: 42 percent say they want to buy a pedelec. Compared to 2017, this is a significant increase of 27 percentage points.
  
  - This is followed by the conventional bicycle with 32 percent and the mountain bike with 22 percent. Currently 5 percent of potential buyers are planning to buy a cargo bike.

- Conventional bicycles such as ladies’ bicycles or city bikes are still most frequently used by cyclists in Germany (62 percent).
  
  - Presently, 14 percent of cyclists use a pedelec and 3 percent use cargo bikes.
In urban areas, the bicycle or pedelec is more frequently used than in rural areas (45 percent vs. 33 percent).

Cargo bikes and bike sharing are more relevant in cities.

- In urban areas, more people than in the countryside have already heard about rental bikes (+15 PP city vs. countryside). While 62 percent of those surveyed from the city state that they have a rental bike system in their place of residence, this applies to only 10 percent of rural population.

- Persons surveyed who live in urban areas are more likely to consider buying a cargo cycle than persons who live in rural areas (11 percent vs. 7 percent).

- Interviewees from urban areas are more likely than those from rural areas to imagine buying a cargo bike. (11 percent urban vs. 7 percent rural)

In the case of pedelecs, the use, the experience and the interest of the persons surveyed differ only marginally between rural and urban areas.
Availability and use of means of transport
Available means of transport

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

- Bicycle without electric assistance: 76%
- Car: 75%
- Pedelec: 14%
- Moped/Scooter: 8%
- Motorcycle: 8%
- E-bikes/high-speed pedelecs: 3%
- No means of transport: 8%

Number in household:
- approx. 2.2
- approx. 1.4
- approx. 1.1

Figures in percent

N = 3,053; all persons surveyed
Frequency of use of means of transport
Bicycle compared to other means of transport

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

<table>
<thead>
<tr>
<th>Means of Transport</th>
<th>Daily</th>
<th>Several times a week</th>
<th>A few times a month</th>
<th>At least a few times a month</th>
</tr>
</thead>
<tbody>
<tr>
<td>By foot</td>
<td>52</td>
<td>30</td>
<td>11</td>
<td>93</td>
</tr>
<tr>
<td>Car</td>
<td>28</td>
<td>33</td>
<td>13</td>
<td>74</td>
</tr>
<tr>
<td>Bicycle/pedelec</td>
<td>15</td>
<td>29</td>
<td>21</td>
<td>65</td>
</tr>
<tr>
<td>Local/regional public means of transport</td>
<td>17</td>
<td>20</td>
<td>21</td>
<td>58</td>
</tr>
<tr>
<td>Long-distance train (IC, ICE, EC, others)</td>
<td>12</td>
<td>9</td>
<td></td>
<td>12</td>
</tr>
<tr>
<td>Moped/Scooter</td>
<td>13</td>
<td>3</td>
<td></td>
<td>7</td>
</tr>
<tr>
<td>Motorcycle</td>
<td>12</td>
<td>4</td>
<td></td>
<td>7</td>
</tr>
<tr>
<td>Long-distance coach</td>
<td>12</td>
<td></td>
<td></td>
<td>3</td>
</tr>
<tr>
<td>Aircraft</td>
<td>12</td>
<td></td>
<td></td>
<td>3</td>
</tr>
<tr>
<td>E-bikes/high-speed pedelecs</td>
<td>11</td>
<td></td>
<td></td>
<td>2</td>
</tr>
</tbody>
</table>

Figures in percent
N = 3,053, all persons surveyed
Regular use of means of transport

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

Figures in percent

- **Bicycle/pedelec**
  - 2019***: 38%
  - 2017**: 41%
  - 2015*: 44%

- **Car**
  - 2019***: 70%
  - 2017**: 78%
  - 2015*: 84%

- **By foot**
  - 2019***: 82%
  - 2017**: 84%
  - 2015*: 70%

**N** = number of persons surveyed:
- ***N = 3,053 persons
- **N = 3,156 persons
- *N = 2,000 persons**
Type of bicycle use – means of transport vs. leisure time


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

Bicycle
(means of transport/leisure time activity)

<table>
<thead>
<tr>
<th>Frequency of Use</th>
<th>2019***</th>
<th>2017**</th>
<th>2015*</th>
</tr>
</thead>
<tbody>
<tr>
<td>At least several times a week</td>
<td>43</td>
<td>41</td>
<td>38</td>
</tr>
<tr>
<td>At least a few times a month</td>
<td>65</td>
<td>62</td>
<td>62</td>
</tr>
<tr>
<td>Even less than once a month</td>
<td>78</td>
<td>77</td>
<td>83</td>
</tr>
</tbody>
</table>

Bicycle just as a means of transport

<table>
<thead>
<tr>
<th>Frequency of Use</th>
<th>2019***</th>
<th>2017**</th>
<th>2015*</th>
</tr>
</thead>
<tbody>
<tr>
<td>At least several times a week</td>
<td>38</td>
<td>34</td>
<td>30</td>
</tr>
<tr>
<td>At least a few times a month</td>
<td>54</td>
<td>52</td>
<td>48</td>
</tr>
<tr>
<td>Even less than once a month</td>
<td>69</td>
<td>70</td>
<td>72</td>
</tr>
</tbody>
</table>

Bicycle as a leisure time activity

<table>
<thead>
<tr>
<th>Frequency of Use</th>
<th>2019***</th>
<th>2017**</th>
<th>2015*</th>
</tr>
</thead>
<tbody>
<tr>
<td>At least several times a week</td>
<td>27</td>
<td>22</td>
<td>21</td>
</tr>
<tr>
<td>At least a few times a month</td>
<td>56</td>
<td>56</td>
<td>56</td>
</tr>
<tr>
<td>Even less than once a month</td>
<td>67</td>
<td>75</td>
<td>72</td>
</tr>
</tbody>
</table>

Figures in percent

***N = 3,053 persons
**N = 3,156 persons
*N = 2,000 persons
Regular use of means of transport
Regular users by size of town/city

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

Size of town/city

<table>
<thead>
<tr>
<th>Size of Town/City</th>
<th>Population up to 20,000</th>
<th>Population between 20,000 and 50,000</th>
</tr>
</thead>
<tbody>
<tr>
<td>Car</td>
<td>77</td>
<td>70</td>
</tr>
<tr>
<td>Local/Regional Public Pass.</td>
<td>68</td>
<td>61</td>
</tr>
<tr>
<td>Bicycle/Pedelec</td>
<td>18</td>
<td>23</td>
</tr>
<tr>
<td></td>
<td>30</td>
<td>34</td>
</tr>
<tr>
<td></td>
<td>33</td>
<td>46</td>
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<tr>
<td></td>
<td>46</td>
<td>46</td>
</tr>
<tr>
<td></td>
<td>44</td>
<td>44</td>
</tr>
</tbody>
</table>

Figures in percent

N = 3,053; all persons surveyed
Regular use of means of transport
Regular users by age

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

<table>
<thead>
<tr>
<th>Age</th>
<th>14-29 years</th>
<th>30-49 years</th>
<th>50-69 years</th>
</tr>
</thead>
<tbody>
<tr>
<td>Car</td>
<td>58</td>
<td>63</td>
<td>60</td>
</tr>
<tr>
<td>Local/Regional public passenger transport</td>
<td>57</td>
<td>34</td>
<td>28</td>
</tr>
<tr>
<td>Bicycle/pedelec</td>
<td>50</td>
<td>46</td>
<td>36</td>
</tr>
</tbody>
</table>

Figures in percent

N = 3,053; all persons surveyed
Regular use of means of transport

Bicycle/pedelec

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

| Daily | Several times a week | Total | Women | Men | 14-19 y. | 20-29 y. | 30-39 y. | 40-49 y. | 50-59 y. | 60-69 y. | Low formal education | Medium formal education | High formal education | Population up to 20,000 | Population between 20,000 and 50,000 | Population between 50,000 and 100,000 | Population between 100,000 and 500,000 | Population of 500,000 or more |
|-------|----------------------|-------|-------|-----|---------|---------|---------|---------|---------|---------|-------------------|-------------------|-----------------|------------------|----------------------|----------------------|----------------------|----------------------|----------------------|
|       |                      |       |       |     | Daily   | Several times a week | Daily | Several times a week | Daily | Several times a week | Daily | Several times a week | Daily | Several times a week | Daily | Several times a week | Daily | Several times a week | Daily | Several times a week |
| Total |                      | 15    | 29    |     | 44      | 44      | 15     | 29     | 15     | 29     | 15     | 29     | 15     | 29     | 15     | 29     | 15     | 29     |
| Women |                      | 13    | 27    |     | 40      | 40      | 13     | 27     | 13     | 27     | 13     | 27     | 13     | 27     | 13     | 27     | 13     | 27     |
| Men   |                      | 15    | 32    |     | 47      | 47      | 15     | 32     | 15     | 32     | 15     | 32     | 15     | 32     | 15     | 32     | 15     | 32     |
| 14-19 y. |                  | 24    | 31    |     | 55      | 55      | 24     | 31     | 24     | 31     | 24     | 31     | 24     | 31     | 24     | 31     | 24     | 31     |
| 20-29 y. |                  | 18    | 30    |     | 48      | 48      | 18     | 30     | 18     | 30     | 18     | 30     | 18     | 30     | 18     | 30     | 18     | 30     |
| 30-39 y. |                  | 14    | 34    |     | 45      | 45      | 14     | 34     | 14     | 34     | 14     | 34     | 14     | 34     | 14     | 34     | 14     | 34     |
| 40-49 y. |                  | 13    | 31    |     | 45      | 45      | 13     | 31     | 13     | 31     | 13     | 31     | 13     | 31     | 13     | 31     | 13     | 31     |
| 50-59 y. |                  | 12    | 27    |     | 39      | 39      | 12     | 27     | 12     | 27     | 12     | 27     | 12     | 27     | 12     | 27     | 12     | 27     |
| 60-69 y. |                  | 10    | 23    |     | 33      | 33      | 10     | 23     | 10     | 23     | 10     | 23     | 10     | 23     | 10     | 23     | 10     | 23     |
| Low formal education | | 11    | 22    |     | 33      | 33      | 11     | 22     | 11     | 22     | 11     | 22     | 11     | 22     | 11     | 22     | 11     | 22     |
| Medium formal education | | 12    | 30    |     | 42      | 42      | 12     | 30     | 12     | 30     | 12     | 30     | 12     | 30     | 12     | 30     | 12     | 30     |
| High formal education | | 18    | 34    |     | 52      | 52      | 18     | 34     | 18     | 34     | 18     | 34     | 18     | 34     | 18     | 34     | 18     | 34     |
| Population up to 20,000 | | 8     | 25    |     | 33      | 33      | 8      | 25     | 8      | 25     | 8      | 25     | 8      | 25     | 8      | 25     | 8      | 25     |
| Population between 20,000 and 50,000 | | 16    | 30    |     | 46      | 46      | 16     | 30     | 16     | 30     | 16     | 30     | 16     | 30     | 16     | 30     | 16     | 30     |
| Population between 50,000 and 100,000 | | 11    | 35    |     | 46      | 46      | 11     | 35     | 11     | 35     | 11     | 35     | 11     | 35     | 11     | 35     | 11     | 35     |
| Population between 100,000 and 500,000 | | 16    | 30    |     | 46      | 46      | 16     | 30     | 16     | 30     | 16     | 30     | 16     | 30     | 16     | 30     | 16     | 30     |
| Population of 500,000 or more | | 16    | 28    |     | 44      | 44      | 16     | 28     | 16     | 28     | 16     | 28     | 16     | 28     | 16     | 28     | 16     | 28     |

Figures in percent

N = 3,053; all persons surveyed
### Popularity of means of transport among users

#### Time comparison survey 2019 – 2017 – 2015

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

<table>
<thead>
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</thead>
<tbody>
<tr>
<td><strong>Bicycle as a means of transport</strong></td>
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<tr>
<td>1 = very much</td>
<td>31</td>
<td>32</td>
<td>27</td>
<td>33</td>
<td>31</td>
<td>27</td>
<td>19</td>
<td>21</td>
<td>24</td>
</tr>
<tr>
<td>6 = not at all</td>
<td>19</td>
<td>21</td>
<td>24</td>
<td>12</td>
<td>9</td>
<td>12</td>
<td>3</td>
<td>5</td>
<td>3</td>
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<tr>
<td><strong>Bicycle as a leisure time activity</strong></td>
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<tr>
<td>1 = very much</td>
<td>35</td>
<td>32</td>
<td>30</td>
<td>35</td>
<td>31</td>
<td>29</td>
<td>19</td>
<td>20</td>
<td>20</td>
</tr>
<tr>
<td>6 = not at all</td>
<td>19</td>
<td>20</td>
<td>20</td>
<td>8</td>
<td>10</td>
<td>11</td>
<td>2</td>
<td>5</td>
<td>3</td>
</tr>
<tr>
<td><strong>Car</strong></td>
<td></td>
<td></td>
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<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>1 = very much</td>
<td>44</td>
<td>52</td>
<td>53</td>
<td>27</td>
<td>23</td>
<td>26</td>
<td>18</td>
<td>13</td>
<td>11</td>
</tr>
<tr>
<td>6 = not at all</td>
<td>18</td>
<td>13</td>
<td>12</td>
<td>7</td>
<td>6</td>
<td>5</td>
<td>3</td>
<td>3</td>
<td>2</td>
</tr>
</tbody>
</table>

Figures in percent

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

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

- Bicycle: 41%
- By foot: 36%
- Car: 27%
- Local/regional public passenger transport: 26%
- Pedelec: 24%
- Miniature Electric Vehicle: 13%
- Long-distance train: 11%
- Aircraft: 8%
- Moped/Scooter: 7%
- Long-distance coach: 6%
- Motorcycle: 5%
- None: 14%

Focus: 14 to 19-year-olds: 63%
Focus: 14 to 19-year-olds: 37%
Focus: Males: 28%
Focus: 14 to 19-year-olds: 18%

N = 3,053; all persons surveyed
Greater use of means of transport in the future
By size of town/city

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

Size of town/city

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

Figures in percent

N = 3,053; all persons surveyed
Greater use of means of transport in the future


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

- Bicycle as a means of transport: 2019*** = 41%, 2017** = 35%, 2015* = 34%
- By foot: 2019*** = 36%, 2017** = 30%, 2015* = 29%
- Car: 2019*** = 27%, 2017** = 32%, 2015* = 35%
- Local/regional public transport: 2019*** = 26%, 2017** = 28%, 2015* = 26%

Figures in percent

***N= 3,053 persons
**N= 3,156 persons
*N= 2,000 persons
Transport policy, mutual respect, feeling of security and wearing of helmets
Improvements for cycling (1/2)
What people want policymakers to do

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

- build more bike paths: 60%
- Separation of cyclists from car drivers: 53%
- Separation of cyclists from pedestrians: 45%
- Set up more safety and cycle lanes: 44%
- more safe bicycle parking facilities: 44%
- create more cycle lanes: 43%
- improve the surface of the cycle paths: 39%
- making intersection areas more visible: 37%
- more parking facilities: 34%

Figures in percent
N = 3,053; all persons surveyed
### Improvements for cycling (2/2)

**What people want policymakers to do**

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

<table>
<thead>
<tr>
<th>Proposal</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Make existing cycle tracks wider (also for cargo bikes)</td>
<td>33</td>
</tr>
<tr>
<td>Improve mutual respect among road users through campaigns</td>
<td>30</td>
</tr>
<tr>
<td>Provide mobility and road safety education, e.g. in schools</td>
<td>27</td>
</tr>
<tr>
<td>Make traffic rules more cycle-friendly/safer for cyclists</td>
<td>26</td>
</tr>
<tr>
<td>Reduce number of cycle tracks directly next to parking cars</td>
<td>26</td>
</tr>
<tr>
<td>Make known traffic rules for cyclists</td>
<td>22</td>
</tr>
<tr>
<td>Provide (better) waiting spots for cyclists at intersections</td>
<td>19</td>
</tr>
<tr>
<td>Start image campaigns for more cycling</td>
<td>13</td>
</tr>
<tr>
<td>Other fields</td>
<td>3</td>
</tr>
</tbody>
</table>

Figures in percent

N = 3,053; all persons surveyed
Due to the way they ride their bike, many cyclists are a factor of uncertainty in road traffic. 25% Fully agree, 39% Partially agree, 10% Don’t know, 20% Rather disagree, 6% Fully disagree.

Cycling in my municipality/city is fun. 10% Fully agree, 39% Partially agree, 13% Don’t know, 24% Rather disagree, 14% Fully disagree.

There is enough space for the bicycle in my city/municipality, the tracks are sufficiently wide. 8% Fully agree, 34% Partially agree, 9% Don’t know, 31% Rather disagree, 18% Fully disagree.

Cycle paths are regularly cleaned/cleared where I live. 9% Fully agree, 31% Partially agree, 22% Don’t know, 23% Rather disagree, 15% Fully disagree.

Cycling infrastructure in my municipality/city is family-friendly. 7% Fully agree, 31% Partially agree, 13% Don’t know, 31% Rather disagree, 18% Fully disagree.

In my municipality/city, traffic lights are programmed in a way that helps cyclists move on quickly. 7% Fully agree, 27% Partially agree, 24% Don’t know, 26% Rather disagree, 16% Fully disagree.

In my municipality/city, all road users show mutual respect. 5% Fully agree, 29% Partially agree, 10% Don’t know, 34% Rather disagree, 22% Fully disagree.

The municipality/city takes care that cars don’t park on cycle tracks. 8% Fully agree, 24% Partially agree, 22% Don’t know, 25% Rather disagree, 21% Fully disagree.

Figures in percent. N = 3,053; all persons surveyed.
## Statements regarding cycling in municipalities/cities

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

<table>
<thead>
<tr>
<th>Statement</th>
<th>Total</th>
<th>Overrepresented</th>
</tr>
</thead>
<tbody>
<tr>
<td>Due to the way they ride their bikes, many cyclists are a factor of uncertainty in road traffic.</td>
<td>64</td>
<td>71</td>
</tr>
<tr>
<td>Cycling in my municipality/city is fun.</td>
<td>49</td>
<td>55</td>
</tr>
<tr>
<td>There is enough space for bicycles in my city/municipality, the paths are wide enough.</td>
<td>42</td>
<td>47</td>
</tr>
<tr>
<td>Cycle paths are regularly cleaned/cleared where I live.</td>
<td>40</td>
<td>43</td>
</tr>
<tr>
<td>Cycling infrastructure in my municipality/city is family-friendly.</td>
<td>38</td>
<td>43</td>
</tr>
<tr>
<td>In my municipality/city, traffic lights are programmed in a way that helps cyclists move on quickly.</td>
<td>34</td>
<td>39</td>
</tr>
<tr>
<td>In my municipality/city, all road users show mutual respect.</td>
<td>34</td>
<td>46</td>
</tr>
<tr>
<td>The municipality/city takes care that cars don’t park on cycle tracks.</td>
<td>32</td>
<td>34</td>
</tr>
</tbody>
</table>

Figures in percent. N = 3,053; all persons surveyed.
Feeling of security when cycling in road traffic

Subjective feeling of security

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

- Yes, very secure: 5%
- Yes, mostly: 51%
- No, rather not: 36%
- No, not at all: 8%

N= 2,376; cyclists
Feeling of security when cycling in road traffic


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

<table>
<thead>
<tr>
<th>Year</th>
<th>Very secure</th>
<th>Mostly secure</th>
<th>Very/mostly secure</th>
</tr>
</thead>
<tbody>
<tr>
<td>2019***</td>
<td>5</td>
<td>51</td>
<td>56</td>
</tr>
<tr>
<td>2017**</td>
<td>4</td>
<td>49</td>
<td>53</td>
</tr>
<tr>
<td>2015*</td>
<td>3</td>
<td>48</td>
<td>51</td>
</tr>
</tbody>
</table>

**Figures in percent**

***N=2,376 cyclists
**N= 2,440 cyclists
*N= 1,644 cyclists
Reasons for feeling insecure in road traffic

**Subjective feeling of security**

"Do you feel secure when cycling in road traffic?"

- Yes, very secure: 5%
- Yes, mostly: 51%
- No, rather not: 36%
- No, not at all: 8%

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

- Too much traffic: 68%
- Reckless car drivers: 68%
- Not enough separate cycle tracks: 59%
- Cars being driven too fast: 56%
- Passenger car doors suddenly being opened: 53%
- Too much heavy goods vehicle traffic (buses, HGV): 46%
- Cars stopping on cycle tracks: 42%
- Reckless cyclists: 37%
- Cycle tracks in poor condition: 34%
- Different speeds of other cyclists: 21%
- General feeling of insecurity on the bicycle: 11%

Figures in percent

N= 2,376; cyclists
N= 1,035; persons who rather not or not at all feel secure in road traffic
As a cyclist, I always follow the rules of the German Road Traffic Regulations.

As a car driver, I always follow the rules of the German Road Traffic Regulations.

I often find that car drivers give a bad example in road traffic.

There is a lot of tension between cyclists and other road users.

I often find that bicycle drivers give a bad example in road traffic.

Other road users show a sufficient amount of respect for cyclists.

As a cyclist, I only follow traffic rules that I consider appropriate.

About innovations in the German road traffic regulations that affect bicycle traffic, I feel informed by media and politics.

As a car driver, I only follow traffic rules that I consider appropriate.
Possession and use of cycle helmets

Possession

“Do you or does your household possess a cycle helmet?”

- Yes: 58%
- No: 42%

Use

“How often do you wear a cycle helmet?”

- Immer: 21%
- Meistens: 17%
- Kein Besitz: 42%
- Nie: 8%
- Eher selten: 12%

N= 2,376; cyclists
Possession and use of cycle helmets

**Possession & use**

“How often do you wear a cycle helmet?”

- **Always** 21%
- **Mostly** 17%
- **At least mostly:** 38%
- **Not too often** 12%
- **Never** 8%
- **No possession** 42%

**Separated by age and sex (always/mostly)**

<table>
<thead>
<tr>
<th>Age Group</th>
<th>Total</th>
<th>Always</th>
<th>Mostly</th>
</tr>
</thead>
<tbody>
<tr>
<td>14-19 years</td>
<td>14</td>
<td>13</td>
<td></td>
</tr>
<tr>
<td>20-29 years</td>
<td>16</td>
<td>15</td>
<td></td>
</tr>
<tr>
<td>30-39 years</td>
<td>25</td>
<td>21</td>
<td></td>
</tr>
<tr>
<td>40-49 years</td>
<td>21</td>
<td>17</td>
<td></td>
</tr>
<tr>
<td>50-59 years</td>
<td>22</td>
<td>18</td>
<td></td>
</tr>
<tr>
<td>60-69 years</td>
<td>27</td>
<td>15</td>
<td></td>
</tr>
</tbody>
</table>

**Figures in percent**

N = 2,376; cyclists
Wearing of helmets


“Do you wear a cycle helmet?”

<table>
<thead>
<tr>
<th></th>
<th>Always</th>
<th>Mostly</th>
<th>Always/mostly</th>
</tr>
</thead>
<tbody>
<tr>
<td>2019***</td>
<td>21</td>
<td>17</td>
<td>38</td>
</tr>
<tr>
<td>2017**</td>
<td>15</td>
<td>15</td>
<td>30</td>
</tr>
<tr>
<td>2015*</td>
<td>16</td>
<td>15</td>
<td>31</td>
</tr>
</tbody>
</table>

Figures in percent

***N=2,376 cyclists
**N=2,440 cyclists
*N=1,644 cyclists
Innovations:
Pedelecs, cargo bikes, bike sharing and micro electric vehicles
Experience with pedelecs
In terms of socio-demographics

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

Experience

Yes 24%

No 76%

Experience by gender and age

<table>
<thead>
<tr>
<th>Gender</th>
<th>Experience</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total</td>
<td>24%</td>
</tr>
<tr>
<td>Female</td>
<td>19%</td>
</tr>
<tr>
<td>Male</td>
<td>29%</td>
</tr>
<tr>
<td>14-19</td>
<td>22%</td>
</tr>
<tr>
<td>20-29</td>
<td>28%</td>
</tr>
<tr>
<td>30-39</td>
<td>28%</td>
</tr>
<tr>
<td>40-49</td>
<td>25%</td>
</tr>
<tr>
<td>50-59</td>
<td>21%</td>
</tr>
<tr>
<td>60-69</td>
<td>20%</td>
</tr>
</tbody>
</table>

Figures in percent
N = 3,053; all persons surveyed
Awareness and use of cargo bicycles

In terms of socio-demographics

Awareness and use of cargo cycles?

- Cargo cycle users: 2%
- No: 46%
- Yes: 52%

Awareness and use of cargo bicycles by gender and age

<table>
<thead>
<tr>
<th>Age Group</th>
<th>Use</th>
<th>Familiarity</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total</td>
<td>2</td>
<td>52</td>
</tr>
<tr>
<td>Female</td>
<td>2</td>
<td>45</td>
</tr>
<tr>
<td>Male</td>
<td>3</td>
<td>58</td>
</tr>
<tr>
<td>14-19 years</td>
<td>3</td>
<td>27</td>
</tr>
<tr>
<td>20-29 years</td>
<td>5</td>
<td>40</td>
</tr>
<tr>
<td>30-39 years</td>
<td>4</td>
<td>51</td>
</tr>
<tr>
<td>40-49 years</td>
<td>2</td>
<td>58</td>
</tr>
<tr>
<td>50-59 years</td>
<td>1</td>
<td>55</td>
</tr>
<tr>
<td>60-69 years</td>
<td>0</td>
<td>66</td>
</tr>
</tbody>
</table>

Figures in percent

N = 3,053; all persons surveyed
Awareness and buying potential of cargo bicycles

**Awareness and use of**

“Have you ever heard of cargo cycles?”

- Yes: 52%
- No: 46%

N = 3,053; all persons surveyed

**Buying potential**

“In general, could you imagine buying a cargo cycle?”

- Yes: 20%
- No: 80%

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

This 20% equals 10% of the total population.
Awareness and spread of bike sharing

Awareness of

"Have you ever heard of public rental bike systems?"

- Yes: 69%
- No: 31%

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

Spread

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

- Yes: 56%
- No: 28%
- I don’t know: 16%

Spread by size of town/city

- Population up to 20,000: 10%
- Population between 20,000 and 50,000: 13%
- Population between 50,000 and 100,000: 27%
- Population between 100,000 and 500,000: 58%
- Population of 500,000 or more: 81%

N = 3,053; all persons surveyed

Figures in percent

N = 2,111; hire cycles known
**Statements regarding bike sharing (1/2)**

"To what extent do you agree with the following statements regarding bike rental systems?"

- **Fully agree**
- **Partially agree**
- **Don’t know**
- **Fully disagree**
- **Rather disagree**

<table>
<thead>
<tr>
<th>Statement</th>
<th>Fully agree</th>
<th>Partially agree</th>
<th>Don’t know</th>
<th>Fully disagree</th>
<th>Rather disagree</th>
</tr>
</thead>
<tbody>
<tr>
<td>I have no need for bike rental systems as I prefer using my own bike as part of my daily routine.</td>
<td>59%</td>
<td>20%</td>
<td>8%</td>
<td>6%</td>
<td>7%</td>
</tr>
<tr>
<td>I prefer to explore foreign cities by foot.</td>
<td>36%</td>
<td>38%</td>
<td>8%</td>
<td>13%</td>
<td>5%</td>
</tr>
<tr>
<td>In foreign cities where I don’t have my own bike available, bike rental systems present an attractive alternative to public transport for me.</td>
<td>28%</td>
<td>34%</td>
<td>17%</td>
<td>11%</td>
<td>10%</td>
</tr>
<tr>
<td>It is a great advantage for me that bike rentals offer the chance to experience foreign cities in a straight and unconventional way.</td>
<td>21%</td>
<td>40%</td>
<td>21%</td>
<td>11%</td>
<td>7%</td>
</tr>
<tr>
<td>I use bike rentals only rarely because I generally prefer other means of transport for my daily routes.</td>
<td>33%</td>
<td>18%</td>
<td>14%</td>
<td>12%</td>
<td>23%</td>
</tr>
<tr>
<td>In my opinion, bike rental systems are a helpful supplement of or temporary alternative to local public transport.</td>
<td>14%</td>
<td>30%</td>
<td>26%</td>
<td>14%</td>
<td>16%</td>
</tr>
</tbody>
</table>

Figures in percent

N= 2,111; hire cycles known
**Statements regarding bike sharing (2/2)**

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

<table>
<thead>
<tr>
<th>Statement</th>
<th>Fully agree</th>
<th>Partially agree</th>
<th>Don’t know</th>
<th>Fully disagree</th>
<th>Rather disagree</th>
</tr>
</thead>
<tbody>
<tr>
<td>Hire cycles are inflexible because rental and return is tied to specific locations.</td>
<td>14%</td>
<td>28%</td>
<td>29%</td>
<td>19%</td>
<td>10%</td>
</tr>
<tr>
<td>All cycles are properly maintained and roadworthy.</td>
<td>13%</td>
<td>26%</td>
<td>29%</td>
<td>11%</td>
<td>5%</td>
</tr>
<tr>
<td>I find the costs for hire cycles appropriate.</td>
<td>10%</td>
<td>24%</td>
<td>45%</td>
<td>12%</td>
<td>6%</td>
</tr>
<tr>
<td>I find the payment scheme simple and uncomplicated to use.</td>
<td>11%</td>
<td>21%</td>
<td>51%</td>
<td>11%</td>
<td>6%</td>
</tr>
<tr>
<td>Registration for the hire cycle scheme is simple and uncomplicated.</td>
<td>11%</td>
<td>21%</td>
<td>54%</td>
<td>9%</td>
<td>5%</td>
</tr>
<tr>
<td>Hire cycles are heavy and clumsy to use.</td>
<td>8%</td>
<td>23%</td>
<td>39%</td>
<td>20%</td>
<td>10%</td>
</tr>
</tbody>
</table>

Figures in percent

N= 2,111; hire cycles known
“Are you planning on buying a micro electric vehicle in the next twelve months?”

**Interest**
- Yes, for sure: 2%
- Yes, maybe: 12%
- Probably not: 27%
- No, for sure not: 59%

**Interest by gender and age**
(Yes, for sure/Yes, maybe)

- Total: 14%
  - Female: 9%
  - Male: 19%
- 14-19 years: 9%
- 20-29 years: 18%
- 30-39 years: 17%
- 40-49 years: 15%
- 50-59 years: 14%
- 60-69 years: 8%
- Bike rental users: 26%

Figures in percent
N = 3,053; all persons surveyed
Reasons for travelling by bicycle and commuting potentials via bike superhighways
“How often do you use the bicycle for the following reasons?” (daily/several times a week/a few times a month)

- **Shopping/little errands**
  - 60 to 69-year-olds: 70%
  - Population between 100,000 and 500,000: 70%

- **Getting to school/university/place of education**
  - Population between 100,000 and 500,000: 67%

- **Visit friends, family or acquaintances**
  - 14 to 19-year-olds: 62%

- **Getting to work/place of training**
  - Population between 100,000 and 500,000: 56%

- **Getting to leisure activities**
  - 14-19-year-olds: 53%

- **Day trips**
  - Population between 50,000 and 100,000: 51%

- **Sports**
  - Men: 37%

- **Carrying cargo**
  - 14 to 19-year-olds: 34%

- **Accompanying people**
  - 30-39-year-olds: 24%

- **Carrying people**
  - 30-39-year-olds: 23%

- **Cycling holidays**
  - Population between 50,000 and 100,000: 14%

*Figures in percent*
Reason to use the bicycle – short errands

Maximum distances

**Frequency**

- Daily: 84%
- Several times a week: 31%
- Several times a month: 18%
- Less than once a month: 16%
- Never: 7%

**Maximum distance**

- Up to 2 km: 28%
- 2 to 5 km: 51%
- 5 to 10 km: 18%
- More than 10 km: 3%

N= 2,376; cyclists

N= 2,004; persons that use the bicycle for shopping groceries or making little errands
Satisfaction with parking situation

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

<table>
<thead>
<tr>
<th>Location</th>
<th>Very good</th>
<th>Good</th>
<th>Satisfactory</th>
<th>Sufficient</th>
<th>Poor</th>
<th>Insufficient</th>
</tr>
</thead>
<tbody>
<tr>
<td>Place of work/training</td>
<td>31</td>
<td>31</td>
<td>21</td>
<td>8</td>
<td>6</td>
<td>3</td>
</tr>
<tr>
<td>School/university/place of education</td>
<td>26</td>
<td>31</td>
<td>23</td>
<td>11</td>
<td>6</td>
<td>3</td>
</tr>
<tr>
<td>Residential environment</td>
<td>27</td>
<td>28</td>
<td>19</td>
<td>11</td>
<td>10</td>
<td>5</td>
</tr>
<tr>
<td>Town/city centre</td>
<td>9</td>
<td>23</td>
<td>29</td>
<td>18</td>
<td>15</td>
<td>6</td>
</tr>
<tr>
<td>Authorities</td>
<td>7</td>
<td>21</td>
<td>27</td>
<td>22</td>
<td>15</td>
<td>8</td>
</tr>
<tr>
<td>(Train) stations</td>
<td>9</td>
<td>19</td>
<td>24</td>
<td>18</td>
<td>18</td>
<td>12</td>
</tr>
</tbody>
</table>

Figures in percent

N=2,376 persons surveyed; however, as up to 50% made no indication in each category, adjustments were made.
Use of the bicycle to get to place of work/education
In terms of socio-demographics

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

- 30%
- 17%
- 53%

Bicycle commuters by gender, age, urban/rural area

- Total
- Female
- Male
- 14-29 years
- 30-49 years
- 50-69 years
- Rural area (population <20,000)
- Urban area (population >50,000)

- 30%
- 29
- 31
- 36
- 31
- 21
- 15
- 32

N= 2,155; employed or undergoing training
Reasons not to use of the bicycle to get to place of work/education

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

- Distance too large: 42%
- Exposed to wind and weather: 41%
- Takes too much time: 39%
- Too hard: 28%
- No developed cycle tracks/cycle paths: 22%
- Too dangerous: 19%
- No secure parking facilities: 13%
- Car is important for profession: 12%
- Too much work to get the bicycle (e.g. from the cellar): 10%
- Distance too small/walking distance: 9%
- Not enough parking facilities for bicycles: 9%
- Use ride sharing: 4%
- Other: 9%

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

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

- Too much car traffic: 72% (69% in rural area, 72% in urban area)
- Reckless behaviour of other road users: 58% (38% in rural area, 61% in urban area)
- No cycle paths/cycle lanes or only in sections: 53% (52% in rural area, 62% in urban area)
- Cycle paths insufficiently separated from car lanes: 38% (27% in rural area, 39% in urban area)
- Traffic regulations on the route not clear: 31% (15% in rural area, 34% in urban area)
- Cycle tracks in poor condition: 29% (19% in rural area, 30% in urban area)
- Cycle tracks not clearly visible to other road users: 28% (15% in rural area, 29% in urban area)
- Unsafe neighbourhood, fear of being addressed/attacked: 25% (19% in rural area, 26% in urban area)
- Cycle tracks/cycle lanes not wide enough: 23% (19% in rural area, 24% in urban area)
- Cycle tracks/cycle lanes poorly lit: 23% (22% in rural area, 27% in urban area)

Figures in percent

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

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

- Better developed cycle paths: 43%
- More cycle paths: 38%
- Secure parking facilities: 34%
- Changing facilities: 25%
- Cyclists get a bonus (voucher for bike repair, employer cycle, etc.): 25%
- Washing facility/shower: 22%
- More cycle parking spaces: 20%
- Room for drying wet cycle clothes: 16%
- Repair options (air pump, breakdown kit, etc.): 15%
- Miss nothing: 29%

Figures in percent

N= 596; cyclists who do not use the bicycle to get to the place of work/training and are employed or undergo training
Assessment of the cycle superhighway initiative of the Federal Government

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

Assessment by urban/rural area

<table>
<thead>
<tr>
<th>Area</th>
<th>Entirely positive</th>
<th>Rather positive</th>
<th>Rather negative</th>
<th>Entirely negative</th>
<th>I don’t know</th>
</tr>
</thead>
<tbody>
<tr>
<td>Urban area (population &gt; 50,000)</td>
<td>32</td>
<td>38</td>
<td>23</td>
<td>4</td>
<td></td>
</tr>
<tr>
<td>Rural area (population &lt; 20,000)</td>
<td>24</td>
<td>40</td>
<td>31</td>
<td>41</td>
<td></td>
</tr>
</tbody>
</table>

N = 3,053; all persons surveyed

Figures in percent
Cycle superhighways & commuting potential

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

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

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

Commuting potential by gender and age

<table>
<thead>
<tr>
<th>Category</th>
<th>Yes (%)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total</td>
<td>74</td>
</tr>
<tr>
<td>Female</td>
<td>77</td>
</tr>
<tr>
<td>Male</td>
<td>71</td>
</tr>
<tr>
<td>14-19 years</td>
<td>83</td>
</tr>
<tr>
<td>20-29 years</td>
<td>76</td>
</tr>
<tr>
<td>30-39 years</td>
<td>73</td>
</tr>
<tr>
<td>40-49 years</td>
<td>69</td>
</tr>
<tr>
<td>50-59 years</td>
<td>72</td>
</tr>
<tr>
<td>60-69 years</td>
<td>60</td>
</tr>
</tbody>
</table>

Figures in percent
Protected bike lanes and cycle-only roads
Protected bike lanes and cycle-only roads

Awareness and use of

Protected bike lanes

- 59% Unknown
- 34% Known, but not yet used.
- 7% Already used

Cycle-only roads

- 36% Unknown
- 34% Known, but not yet used.
- 30% Already used

N = 3,053; all persons surveyed
Preference of cycle-only roads over other cycle tracks

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

- Yes: 48%
- Equivalent to other cycle tracks: 44%
- No: 8%

N= 922; persons surveyed who have already use a cycle-only road
Bicycle tourism and bicycle market
Bicycle tour in the last two years

In terms of socio-demographics

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

Separated by gender and age

<table>
<thead>
<tr>
<th>Age Group</th>
<th>Total</th>
<th>Female</th>
<th>Male</th>
</tr>
</thead>
<tbody>
<tr>
<td>14-19 years</td>
<td>45</td>
<td>41</td>
<td>46</td>
</tr>
<tr>
<td>20-29 years</td>
<td>45</td>
<td></td>
<td></td>
</tr>
<tr>
<td>30-39 years</td>
<td>47</td>
<td></td>
<td></td>
</tr>
<tr>
<td>40-49 years</td>
<td>46</td>
<td></td>
<td></td>
</tr>
<tr>
<td>50-59 years</td>
<td>41</td>
<td></td>
<td></td>
</tr>
<tr>
<td>60-69 years</td>
<td>38</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Figures in percent

N= 2,376; Cyclists
Use of D-routes

“Have you ever used a ‘D route’?”
- 2% Yes, one or more complete routes.
- 6% Yes, partially.
- 7% No
- 85% Unknown

N = 3,053; all persons surveyed

“Which ‘D-route(s)’ have you already used?” (more than one answer possible)
- Route 1: North Sea Coast Route: 15%
- Route 2: Baltic Coast Route: 14%
- Route 3: European Bicycle Route: 14%
- Route 4: Mittelland Route: 10%
- Route 5: Saar-Mosel-Main Route: 15%
- Route 6: Danube Route: 15%
- Route 7: Pilgrimage Route: 7%
- Route 8: Rhine Route: 20%
- Route 9: Weser Romantic Route: 10%
- Route 10: Elbe Cycle Route: 17%
- Route 11: Baltic Sea - Upper Bavaria Route: 8%
- Route 12: Oder-Neiße Cycle Route: 6%

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

Figures in percent
Type of bicycle used

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

- Conventional bicycle (ladies bicycle, city bicycle or similar) 62%
- Mountain bike 27%
- Trekking bike 17%
- Pedelec 14%
- Sports bicycle (fitness bicycle, racing bicycle or similar) 8%
- Cargo bike 3%
- Folding bike 2%
- Individual custom-designed bike 1%
- Other 3%

N= 2,376; cyclists

Figures in percent
### Plans to buy a bicycle

#### Type of bicycle and budget

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

#### 1. Planned purchase

<table>
<thead>
<tr>
<th>Type(s) of bicycles</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Electric bicycle (pedelec)</td>
<td>42%</td>
</tr>
<tr>
<td>Conventional bicycle</td>
<td>32%</td>
</tr>
<tr>
<td>Mountain bike</td>
<td>22%</td>
</tr>
<tr>
<td>Sports bicycle (fitness bicycle, racing bicycle or the like)</td>
<td>13%</td>
</tr>
<tr>
<td>Trekking bike</td>
<td>13%</td>
</tr>
<tr>
<td>Cargo bike</td>
<td>5%</td>
</tr>
<tr>
<td>Folding bike</td>
<td>2%</td>
</tr>
<tr>
<td>Individual custom-designed bike</td>
<td>1%</td>
</tr>
<tr>
<td>Other</td>
<td>1%</td>
</tr>
</tbody>
</table>

#### 2. Type(s) of bicycles

- Electric bicycle (pedelec)
- Conventional bicycle
- Mountain bike
- Sports bicycle (fitness bicycle, racing bicycle or the like)
- Trekking bike
- Cargo bike
- Folding bike
- Individual custom-designed bike
- Other

#### 3. Budget

<table>
<thead>
<tr>
<th>Budget Range</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Up to € 100</td>
<td>4%</td>
</tr>
<tr>
<td>Up to € 300</td>
<td>17%</td>
</tr>
<tr>
<td>Up to € 500</td>
<td>18%</td>
</tr>
<tr>
<td>Up to € 800</td>
<td>12%</td>
</tr>
<tr>
<td>Up to € 1,000</td>
<td>12%</td>
</tr>
<tr>
<td>Up to € 1,500</td>
<td>13%</td>
</tr>
<tr>
<td>Up to € 2,000</td>
<td>11%</td>
</tr>
<tr>
<td>Upwards of € 2,000</td>
<td>7%</td>
</tr>
<tr>
<td>I don’t know</td>
<td>6%</td>
</tr>
</tbody>
</table>

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

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

Ø approx. € 865,-
Plans to buy a bicycle


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

<table>
<thead>
<tr>
<th>Year</th>
<th>Yes, for sure.</th>
<th>Maybe</th>
<th>Ø spending</th>
</tr>
</thead>
<tbody>
<tr>
<td>2019***</td>
<td>6</td>
<td>25</td>
<td>€ 865,-</td>
</tr>
<tr>
<td>2017**</td>
<td>5 31%</td>
<td>24</td>
<td>€ 681,-</td>
</tr>
<tr>
<td>2015*</td>
<td>4 25%</td>
<td>21</td>
<td>€ 603,-</td>
</tr>
</tbody>
</table>

Figures in percent

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

***N= 924 potential buyers
**N= 925 potential buyers
*N= 492 potential buyers
“What type of bicycle or what types of bicycles will you most probably buy then?” (more than one answer possible)

- Pedelec: 15% (2017), 42% (2019)
- Conventional bike: 23% (2017), 43% (2019)
- Mountain bike: 22% (2017), 13% (2019)
- Trekking bike: 13% (2017), 5% (2019)
- Sports bike (e.g. racing bike): 20% (2017), 13% (2019)
- Cargo bike: 3% (2017), 5% (2019)

Figures in percent

**N= 924 potential buyers
*N= 925 potential buyers
Comparison: cyclists in rural areas vs. cyclists in urban areas
Frequency of bicycle use

Urban vs. rural area

“How often do you use the bicycle/pedelec?”

<table>
<thead>
<tr>
<th>BICYCLE/PEDELEC</th>
<th>Daily</th>
<th>Several times a week</th>
<th>A few times a month</th>
<th>Regular use</th>
</tr>
</thead>
<tbody>
<tr>
<td>Rural area (population of less than 20,000)</td>
<td>8</td>
<td>25</td>
<td>25</td>
<td>33%</td>
</tr>
<tr>
<td>Urban area (population greater than 50,000)</td>
<td>15</td>
<td>30</td>
<td>21</td>
<td>45%</td>
</tr>
</tbody>
</table>
Improvements for cycling (1/2)

Urban vs. rural area

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

- Build more cycle paths: 64% (Urban) vs. 60% (Rural)
- Separate cyclists from car drivers: 50% (Urban) vs. 53% (Rural)
- Separate cyclists from pedestrians: 41% (Urban) vs. 45% (Rural)
- Establish more advisory and mandatory cycle lanes: 42% (Urban) vs. 45% (Rural)
- Provide secure parking facilities: 41% (Urban) vs. 44% (Rural)
- Establish more cycle-only roads: 40% (Urban) vs. 43% (Rural)
- Improve surface of cycle paths: 36% (Urban) vs. 40% (Rural)
- Improve visibility at intersections: 35% (Urban) vs. 37% (Rural)
- Build more parking facilities: 29% (Urban) vs. 35% (Rural)

Figures in percent

N = 3,053; all persons surveyed
Improvements for cycling (2/2)

Urban vs. rural area

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

<table>
<thead>
<tr>
<th>Improvement</th>
<th>Urban Area (%)</th>
<th>Rural Area (%)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Make existing cycle paths wider (also for cargo bikes)</td>
<td>34</td>
<td>27</td>
</tr>
<tr>
<td>Campaigns for improving mutual respect between pedestrians, cyclists and car drivers</td>
<td>30</td>
<td>25</td>
</tr>
<tr>
<td>Provide mobility and road safety education, e.g. in schools</td>
<td>28</td>
<td>21</td>
</tr>
<tr>
<td>Make traffic rules more cycle-friendly/safer for cyclists</td>
<td>27</td>
<td>23</td>
</tr>
<tr>
<td>Reduce number of cycle paths directly next to parking cars</td>
<td>27</td>
<td>18</td>
</tr>
<tr>
<td>Make known traffic rules for cyclists</td>
<td>23</td>
<td>16</td>
</tr>
<tr>
<td>Provide (better) waiting spots for cyclists at intersections</td>
<td>20</td>
<td>15</td>
</tr>
<tr>
<td>Start image campaigns for more cycling</td>
<td>14</td>
<td>11</td>
</tr>
</tbody>
</table>

Figures in percent

N = 3,053; all persons surveyed
"Why do you feel (rather) insecure?" (more than one answer possible)

- There is too much traffic on the roads. (61% urban, 69% rural)
- Other car drivers behave recklessly. (62% urban, 68% rural)
- Cars are being driven too fast. (55% urban, 61% rural)
- There is the danger that doors of parking vehicles are suddenly being opened. (38% urban, 56% rural)
- Too many vehicle drivers consider cycle paths a drop-off zone. (30% urban, 44% rural)
- Other cyclists behave recklessly. (20% urban, 40% rural)
- Many cycle paths are in poor condition. (29% urban, 35% rural)
- There are too many cyclists riding at different speeds on the cycle track. (14% urban, 22% rural)

Figures in percent

N= 1,035; cyclists who feel (rather) insecure on the bicycle
### Summary: urban vs. rural area

#### Overview of the most significant differences

<table>
<thead>
<tr>
<th>Means of transport that will be used more frequently in the future*</th>
<th>Rural area (population up to 20,000)</th>
<th>Urban area (population of 50,000 or more)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Car (34 %)</td>
<td>Bicycle (43 %)</td>
<td></td>
</tr>
</tbody>
</table>

| Regular bicycle use (at least several times a week) | 33 % | 45 % |

<table>
<thead>
<tr>
<th>Reasons insecurity on bicycle* (Basis: cyclists who feel insecure)</th>
<th>Reckless car drivers (62 %)</th>
<th>Too much traffic on the roads (69 %)</th>
</tr>
</thead>
</table>

| Most frequently used type of bicycle routes* (Basis: cyclists) | Roadway without marked cycle lanes (51 %) | Roadway with separately marked cycle lanes (53 %) |

| Feeling of security on this type of track | 80 % feel insecure | 34 % feel insecure |

| Regular use of cycle helmets (Basis: cyclists) | 37 % | 38 % |

| Cycling in my city is fun. | 55 % | 49 % |

| Awareness of bike rental systems | 56 % | 71 % |

| Interest in pedelecs | 48 % | 44 % |

| Awareness of cargo bikes | 41 % | 56 % |

| Cargo bike potential | 7 % | 11 % |

*refers to the most frequently given response in each case