



STATE OF THE NATION REPORT

Examining attitudes towards e-bike usage in 12 European countries



Welcome to State of the Nation 2022

Shimano is pleased to share the results of their European-wide research into e-bike attitudes and use.

Welcome to the fourth of Shimano’s State of the Nation reports. This report has been commissioned to look at the place e-bikes have in our societies and how current European trends and concerns have influenced consumer interest in purchasing or using e-bikes. The aim of the report is to examine the motivations of e-bike users and better understand the changes to the e-bike market that have emerged in the last 12 months.

A year ago we were seeking a way to understand what the ‘new normal’ would look like, as we emerged from the global COVID-19 pandemic, predictions were wide-ranging. As Europe advances further from the lockdowns, the view is that societies appear to be adapting well. We are now able to make a post- COVID comparison on European attitudes towards buying and using e-bikes.

The awareness of (and even attitudes towards) those who interact with an e-bike in some way are shifting upwards. The positive contribution of using an e-bike regularly, and what cycling in general brings to the mind and body is well researched; a third of our over 15,500 respondents surveyed agreed that an increase in awareness of how e-bikes can improve health and fitness would encourage their use (32%), with around half seeing e-bikes as ‘for commuters’ (48%). And let’s not forget the all-important consideration of safety. Despite the progress of improved infrastructure (in a time which saw the rapid introduction of ‘Covid cycle lanes’), perception of these improvements varies across European countries. Well-maintained cycling infrastructure may encourage more individuals to purchase an e-bike (31%), in general; in combination with an e-bike subsidy (41%).

Society, and the bike industry however, have reasons to remain cautious: particularly in the face of new crises that could not only impact the industry’s supply chain and manufacturing practices, but in some instances society’s basic needs, including food and the cost of energy. In fact, our survey suggests that across all 12 European countries profiled, cost-of-living (for example, higher car fuel prices) is the primary motivating factor (47%) in e-bike usage now, compared to one year ago. Such impacts will continue to be felt, compounded by the addition of an anticipated energy crisis.

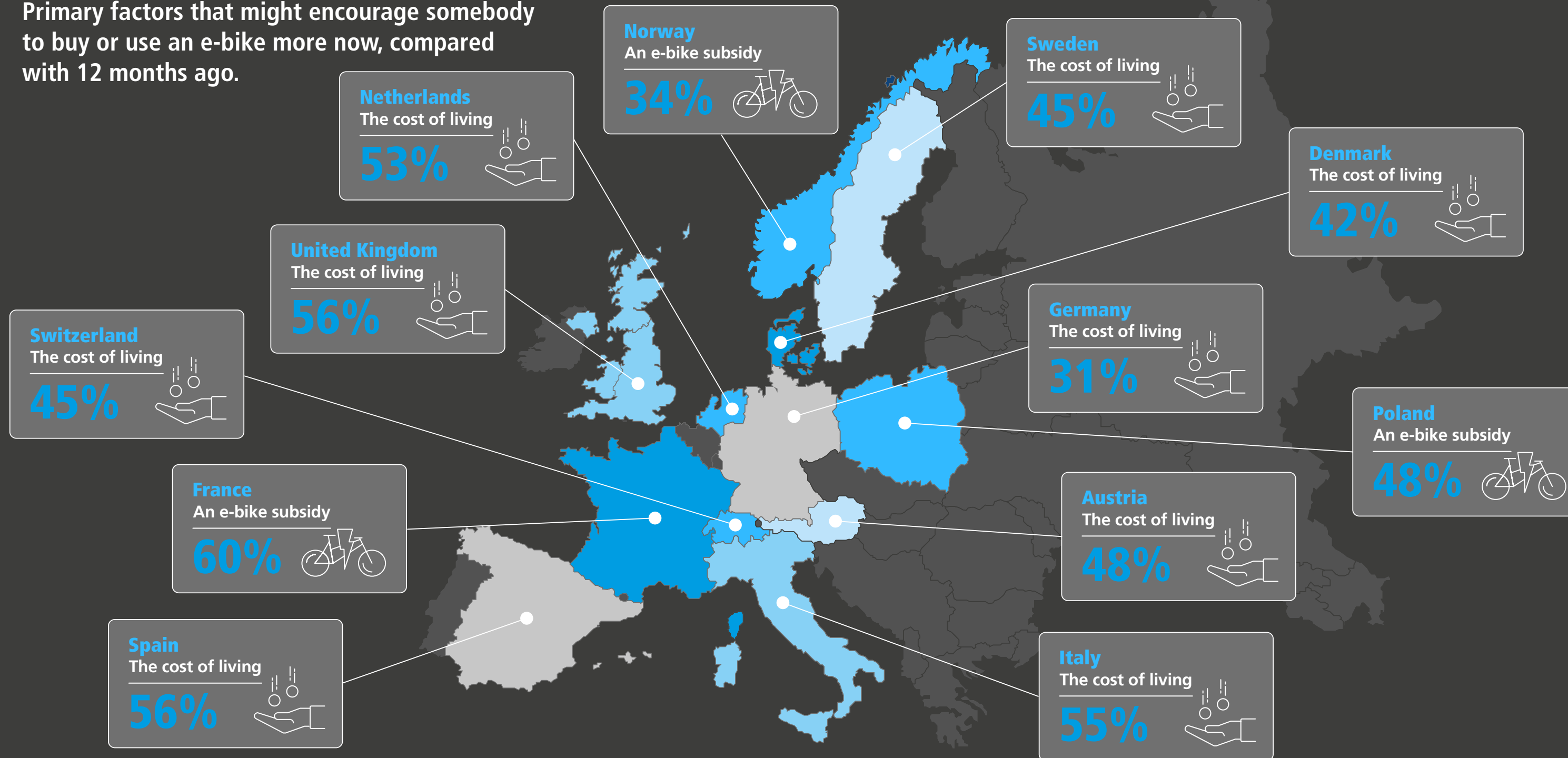
We invite you to consider this information, regardless of your role, there is plenty of food for thought inside this report.

¹ Specifically Austria, Denmark, France, Germany, Italy, the Netherlands, Norway, Poland, Spain, Sweden, Switzerland, and the UK.Switzerland, and the UK.

4-5	European Trends
6-11	Who Are E-bikes For?
12-17	Section 1: Reasons To Ride
18-23	Section 2: Cycling Infrastructure
24-29	Section 3: Attitudes Towards E-bikes
30-35	Section 4: Servicing
36-38	Partner Comments
39-40	Closing Statement
41-118	Appendix: YouGov Survey Data

European Trends

Primary factors that might encourage somebody to buy or use an e-bike more now, compared with 12 months ago.



Economic factors are seen by Europeans as the strongest encouragement for buying or using an e-bike more. On average across Europe, 47% see the cost of living as primary motivation and 41% see purchase subsidies as an encouragement to more e-bike use.

Sweden, Norway, Austria, France, Germany and Scotland (part of the UK) have all offered e-bike subsidies either currently or in recent years. Only three countries (France, Norway and Poland) have put subsidies ahead of Cost of Living as the primary reason people may ride more now. France offered incentives of up to EUR 4,000 to people who want to switch their cars for bicycles or e-bikes, 60% of French respondents say a subsidy is an encouraging reason to buy or use an e-bike.

Henk Swarttouw

President of the European Cyclists' Federation

Henk Swarttouw was elected as President of the European Cyclists' Federation (ECF) in 2021, advocating for more and better cycling for all in Europe and beyond. He has been a professional diplomat in the Dutch foreign service for 30+ years, serving in the US, France and the UK. Henk was Dutch ambassador to Finland 2012 - 2015 and to Denmark 2015 - 2019. He is now an independent advisor on sustainability and international cooperation. Since his arrival in Finland in 2012, he has been actively engaging in cycling diplomacy.

25% of our greenhouse gas (GHG) emissions are attributable to transport. Unlike other sectors, the emissions of the transport sector are still rising. About 75% of transport emissions are from road transport and two-thirds of those from cars and vans. Electrifying all those cars and vans will take many decades. It will not happen fast enough to achieve the emission reduction goals that we have set ourselves. This is where (electric) bicycles come in. 50% of all car trips are shorter than 5 kilometres and can easily be replaced by bike rides. One in three respondents cite the climate as an important factor to encourage purchase of an e-bike, but the survey cites the cost of living as the most important factor (47%).

In countries such as Germany, Belgium and the Netherlands, electric bikes already outsell traditional bikes. Electric bikes make cycling accessible to those who have been hesitant as to their physical prowess, in particular women and the elderly, but e-bikes also give short shrift to hills and headwinds. People who shift to e-bikes make on average 1.5 times more trips on their bike, which are on average twice as long as trips on regular bikes, which adds up to a 200% in the total distance cycled.

When we ask people why they don't cycle, over half of respondents cite concern over a perceived lack of safety. Cyclists' perceived sense of safety can be enhanced by building adequate, separate high-quality cycling infrastructure. "If you build it, they will come" is an adage that continues to be true, particularly in countries with less developed cycling infrastructure as confirmed by respondents in Poland (43%), France (42%) and Spain (41%). Many governments have been investing in cycling infrastructure over the past year. Respondents are divided over the speed and quality of improvements, with low levels in the UK (27%), Sweden (30%) & Denmark (32%) agreeing that their local cycle infrastructure has improved over the last 12 months.

Countries with a rising uptake of e-bikes are seeing increased competition for the limited available cycling infrastructure, which becomes scarcer as demand for cycle space rises when more people choose (e-) bikes for their commute, running errands or leisure. The increasing diversity on the cycle path, including higher-speed e-bikes and wide and heavy (e)-cargo bikes lead to competition for the scarce road space that is presently reserved for cycling. Traffic planners and road authorities struggle to keep up with this trend. Road users can switch from a car to an e-bike in a day, but changing road lay-outs may take years.

As stated before, e-bikes can and will attract people to cycling who did not cycle before. But e-bikes can also extend the cycling life of those who would have stopped cycling because of old age or diminished physical capability. Particularly in the Netherlands and Belgium there is a very high uptake of e-cycling among pensioners and the elderly. Admittedly this is leading to a noticeable increase in crashes and injuries among the older cohorts.

The World health Organisation is including cycling and active mobility in its healthy ageing agenda and relevant research suggests that the aggregate collective health effects of cycling into old age far outweigh the negative impact of the increase in crashes and injuries. Particularly in the Netherlands (65%), Denmark (55%) and Austria (52%) the elderly are considered an important target group for e-bikes.

The cost of e-bikes remains a threshold for their uptake. National subsidy schemes, fiscal measures or employee benefits can lower the threshold. 41% of Europeans surveyed say subsidies might encourage them to buy or hire an e-bike. The EU has created the possibility to apply lower VAT rates to the sale and repair of (e-) bikes. National governments can implement this in their tax legislation to stimulate the purchase and maintenance of e-bikes. The higher investment in an e-bike, combined with its relative technical complexity, will mean that the demand for regular professional servicing may increase as 51% of those who are likely to get their bike serviced in the next 6-months say it is important to make bikes last longer. Some e-bike suppliers are starting to include regular servicing in their offers.

An unfortunate consequence of the higher value of e-bikes is the increased risk of theft. 26% of respondents consider secure bike parking an important condition for the purchase of e-bikes. Local authorities, housing associations and employers will need to invest in safe and secure bicycle parking facilities.

Not included in this survey, but worth mentioning is the increasing use of e-cargo bikes in logistics. Particularly in urban centres, e-cargo bikes prove to provide a nimbler, more efficient way to deliver packages than the traditional vans. As logistics companies remove delivery vans from the streets, the pressure on the cycling infrastructure continues to increase.



"E-bikes can and will attract people to cycling who did not cycle before. But e-bikes can also extend the cycling life of those who would have stopped cycling because of old age or diminished physical capability"

Who are e-bikes for?

Nature lovers. **Austria**

People who are worried about the environment. **Sweden**

Nature lovers, people who love freedom. **Poland**

52% of Europeans think e-bikes are for environmentally conscious people.

Anyone who wants exercise, fresh air and at the same time save costs for fossil fuel and thus contribute to a greener climate. **Denmark**

Anyone who wishes to cycle with ease. **UK**

People who need it to work and do not have money to buy or maintain a car. **Spain**

Families with children. **Denmark**

People who are worried about the environment. **UK**

47% of Europeans think the cost of living is a reason for somebody to buy or hire an e-bike now compared to 12 months ago.

People who need to save money but are rich enough to buy one. **Spain**

People who want an alternative to a car or public transport. **Poland**

Adults who prefer to travel by bike or who simply enjoy cycling. **Austria**

Who are e-bikes for?

Who are e-bikes for?



Who are e-bikes for?



Who are e-bikes for?

WHO DO EUROPEANS THINK E-BIKES ARE FOR?



Statistics are unable to convey the nuances of opinion, so we gave respondents the freedom to share their own words. This allowed us to discover how they really feel about e-bikes. It is enlightening to read the full range of answers. E-bikes can be divisive with some Europeans feeling they are only for 'the rich', some said they were for people who were 'lazy' or 'hypocritical,' if they really cared about the environment they would ride an ordinary bike. Many more suggested that e-bikes are beneficial for those who 'for other reasons are unable to cycle', those who 'live near mountains' or 'do not have money for a motor vehicle.' However, the dominant answer across all nationalities and in all languages was that e-bikes are for 'everyone.'

(Full data including open-ended answers is available on request from Shimano)

What will motivate more Europeans to ride e-bikes?

Investigating factors that might encourage someone to buy or hire an e-bike

Cost of living, subsidies and environmental concerns lead the reasons why more people may consider using an e-bike.

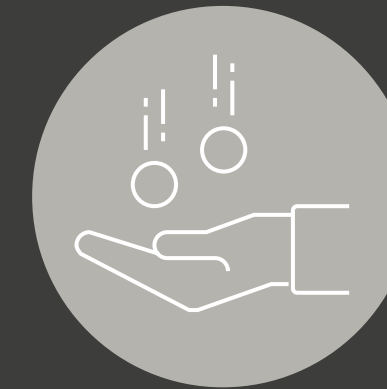
In 2021 we asked if Europeans were more or less likely to ride e-bikes than before the pandemic and why. At that time 2 in 5 (39%) told us they felt that a primary reason for using an e-bike was avoiding public transport because of the risk of catching COVID-19. Now, in 2022 only 1 in 5 (18%) think of it as their primary reason, compared with the previous 12 months.

However it is cost of living which is on our minds with 47% perceiving it as a reason to use an e-bike (presumably in response to rising fuel and public transport costs) and 41% saying an e-bike subsidy which would relieve the burden of the initial purchase would motivate them to buy an e-bike.

Environmental concerns have come to the fore in 2022 and while across Europe an average of 33% of people surveyed say that knowing it will lessen their environmental impact is a reason to ride, in countries affected by heat and drought the percentage is much higher (Italy 51% and Spain 46%). 18-24 year olds are most concerned with their environmental impact.

47%

of Europeans feel the cost of living and higher car fuel prices is a reason to ride



35%

of those age 55+ consider personal health and fitness to be a reason to ride e-bikes



1 in 3

Europeans are motivated by lessening their environmental impact



36%

of women see lessening their environmental impact as a reason to ride vs 30% of men

51%

of women are motivated to use an e-bike to reduce their cost of living vs 43% of men



29%

of Spanish respondents felt that more education is needed about the benefits of e-bike use





Who are e-bikes for?

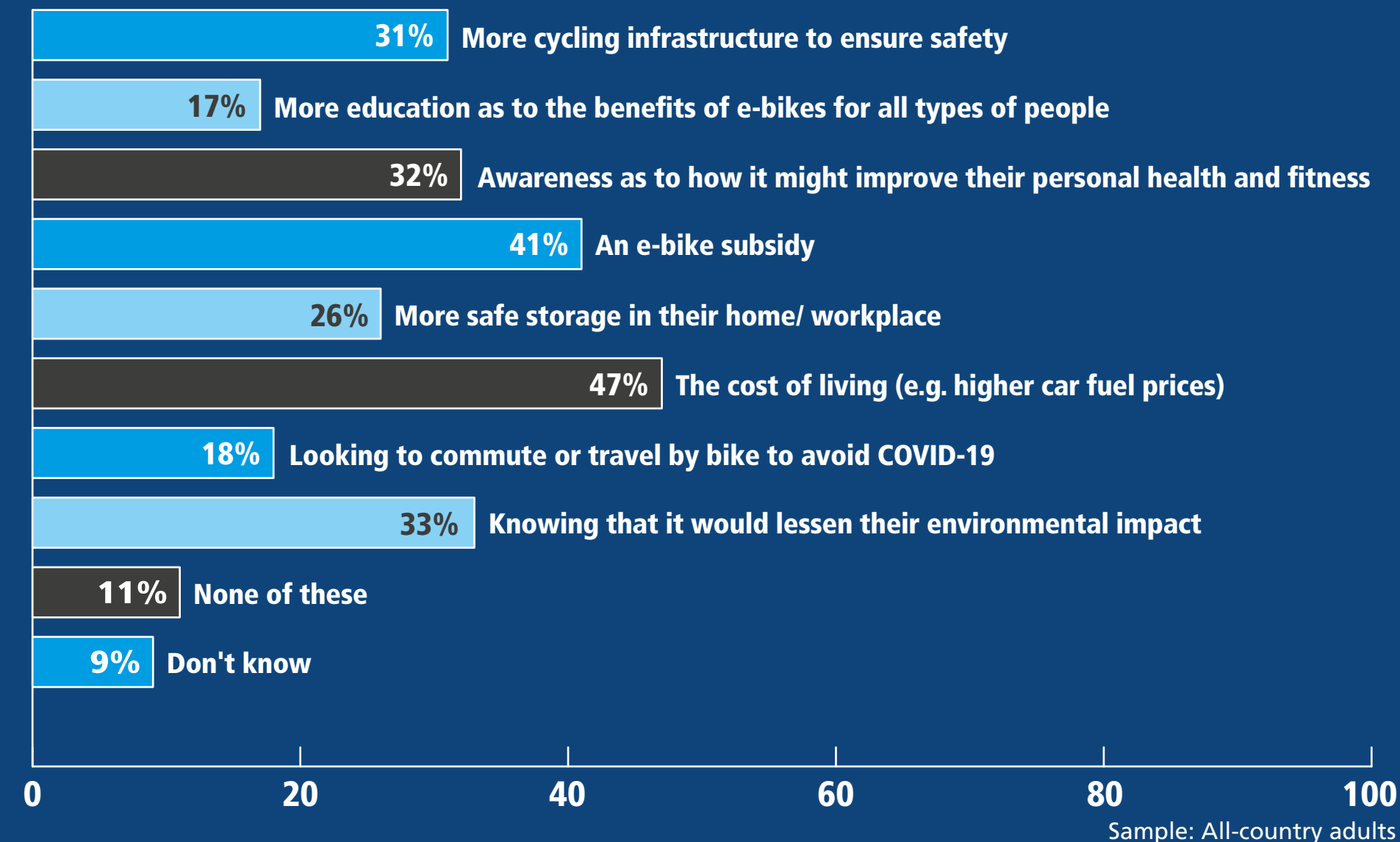
People who have to get from A to B but don't want to be completely sweaty when they get there **Denmark**

Economic reasons (cost of living and e-bike subsidies) are now the major push-factors towards increasing e-bike use, our 2022 survey found. All countries except Norway and Poland placed cost of living (e.g. higher car fuel prices) as their primary motivation towards more e-bike use. Norway and Poland felt that e-bike subsidies were the top factor, followed by cost of living concerns. Cost of living is consistently perceived as the strongest reason to buy or hire an e-bike across all age groups.

An awareness of the benefits of e-bike use to improve health and fitness is strongest amongst the age group 55+ (35% versus an average of 32%). E-bikes support riders in cycling further and faster than they can on their own thus helping them maintain an active lifestyle. From this survey it suggests the message is reaching the target audience. Further advice, education and marketing to this age group on the theme of health and well-being would be well-received.

In 2021, 19% of those surveyed felt that 'people don't know enough about e-bikes' was a reason people were less likely to buy or use an e-bike compared with before the pandemic. In 2022, 17% of all respondents felt that more education was needed around the benefits of e-bike use to all types of people. The younger age group (18-24 year olds) cited education as most encouraging to people to buy/hire an e-bike (19% versus an average of 17%). It is unclear from the survey whether this is because they feel their age group needs more education or that older age-groups do.

WHICH, IF ANY, OF THE FOLLOWING DO YOU THINK MIGHT ENCOURAGE SOMEBODY TO BUY OR HIRE AN E-BIKE MORE NOW, COMPARED TO 12 MONTHS AGO?



Hirra Khan Adeogun

Head of Car Free Cities

As head of Car Free Cities, Hirra Khan Adeogun currently leads on Possible's landmark programme to kickstart the process of making private cars obsolete in UK cities, accelerating the move to a zero carbon Britain built by and for everyone. She is passionate about designing sustainable futures that centre social justice, human rights and community cohesion.

Earlier this year, my climate action charity Possible challenged ten drivers to live without their cars for a month.

We wanted to find out what the barriers were for ordinary people taking up walking, cycling and public transport. One of the participants was a young mum from north London, and we helped her get an e-bike to ride instead of driving her car. She said it changed her life, saved her money, cut her carbon emissions, and led to her living a happier, healthier lifestyle. After handing back her e-bike, she started saving for her own.

Given the incredible results of our trial, I was really interested to read this new research asking what would motivate Europeans to start riding an e-bike.

I wasn't surprised to see a clear majority of respondents saying that the cost of living crisis would be a motivating factor. Here in the UK, the spiralling fuel prices are part of a broader cost of living emergency, particularly worsened by the impacts of leaving the European Union. This unique dimension might explain why of all the countries polled, this was a particularly motivating factor to the UK.

The good news is that giving up your car is indeed likely to save you money. When we ran our car free trial, eight out of the ten participants reported saving money, with one participant pocketing an extra £53/€61 a week.

But it's not just about the pound in your pocket. The European Environment Agency (EEA) report stated that road transportation accounts for 24% of Europe's CO2 emissions, transport produces a whopping 27% of emissions in the UK. It's heartening to see that knowing e-bikes would reduce environmental impact is also a strong motivating factor for riding, and particularly so in the UK compared to the polling average.

Switching to low carbon transport like an e-bike is one of the single most impactful carbon savings you can make as an individual, and so to see that 33% of Europeans polled think this is a motivating factor that would get people on their bikes is hopeful.

Of course, one absolutely fundamental factor for motivating people to get out of their cars and onto an e-bike is having the decent and safe infrastructure to enable it. Here in the UK, this came out as a key theme in the recent research with 36% of respondents saying more infrastructure would encourage them onto an e-bike, which is a full 5% above the European average (31%).

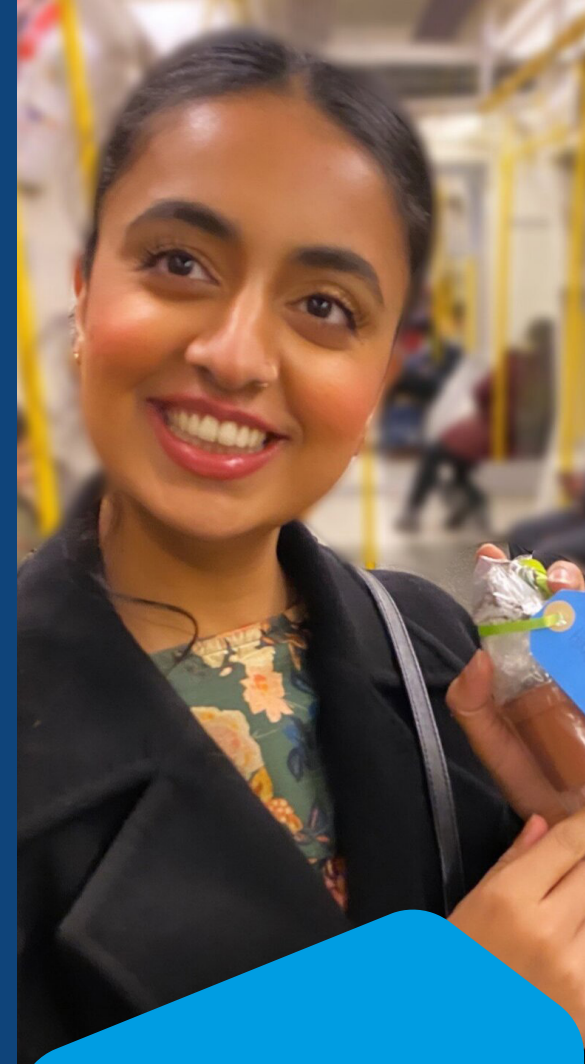
And it's not just about bike lanes. The recent #ThisIsAwkward campaign from Clean Cities UK highlighted the lack of storage for bikes around the country, revealing the spots cyclists are forced to shove their bikes, from the bedroom to the shower. Clearly, when it comes to infrastructure, it's not just about getting around, but more secure parking at home and wherever we're going. 26% of Europeans feel that more storage would encourage more people to ride e-bikes.

All of which is to say there are a range of ways to motivate people to take up an e-bike and for success we most make efforts to use all of them.

A few months after we asked ten people to go car free, we invited the public at large to give up their cars for a month and nearly a thousand people answered our call. Quite honestly, I wasn't prepared for the results. After they took part, an astonishing 98% said they wanted to cut down the use of their car permanently.

Clearly, there is a growing appetite for car-free living here in the UK, and e-bikes will play a vital role in enabling that transition. I'm so pleased to see that this research from Shimano shows that people across Europe can see so many good reasons to get out of the car, and onto an e-bike.

"The good news is that giving up your car is indeed likely to save you money. When we ran our car free trial, eight out of the ten participants reported saving money."



Has cycling infrastructure improved?

Investigating the perceptions of Europeans on their local infrastructure

The majority of Europeans either don't think their local cycling infrastructure has improved or they are unsure if it has.

Cycling infrastructure can have a huge impact on people's motivation to use e-bikes. In our 2021 report, we discovered that not feeling safe riding one (e.g. a lack of cycling infrastructure in their town or city) meant that 24% of Europeans were less likely to buy or use an e-bike at the time of the survey compared to before the COVID-19 Pandemic. In this year's report 31% thought more cycling infrastructure might encourage someone to buy or use an e-bike compared with the previous 12 months. In this question we try to establish how much cycling infrastructure has improved in the last 12 months.

Broadly Europeans don't feel it has, with 45% saying they don't agree it has improved and a further 17% saying they don't know. The Highest level of disagreement was found in Italy (52%), Germany (49%) & UK (49%). Poland was a notable exception with 56% agreeing that local infrastructure has improved. While there were inter-country differences we found little difference of opinion between age-groups or genders in each country.

31%

of Europeans think more cycling infrastructure might encourage someone to use an e-bike



1 in 4

Europeans feel that more safe bike storage is needed to encourage e-bike use



45%

of Europeans don't agree that their local cycling infrastructure has improved



49%

of UK respondents don't agree that infrastructure has improved

1 in 2

Italians don't agree that their local cycling infrastructure has improved



56%

of Polish people agree that their local cycling infrastructure has improved





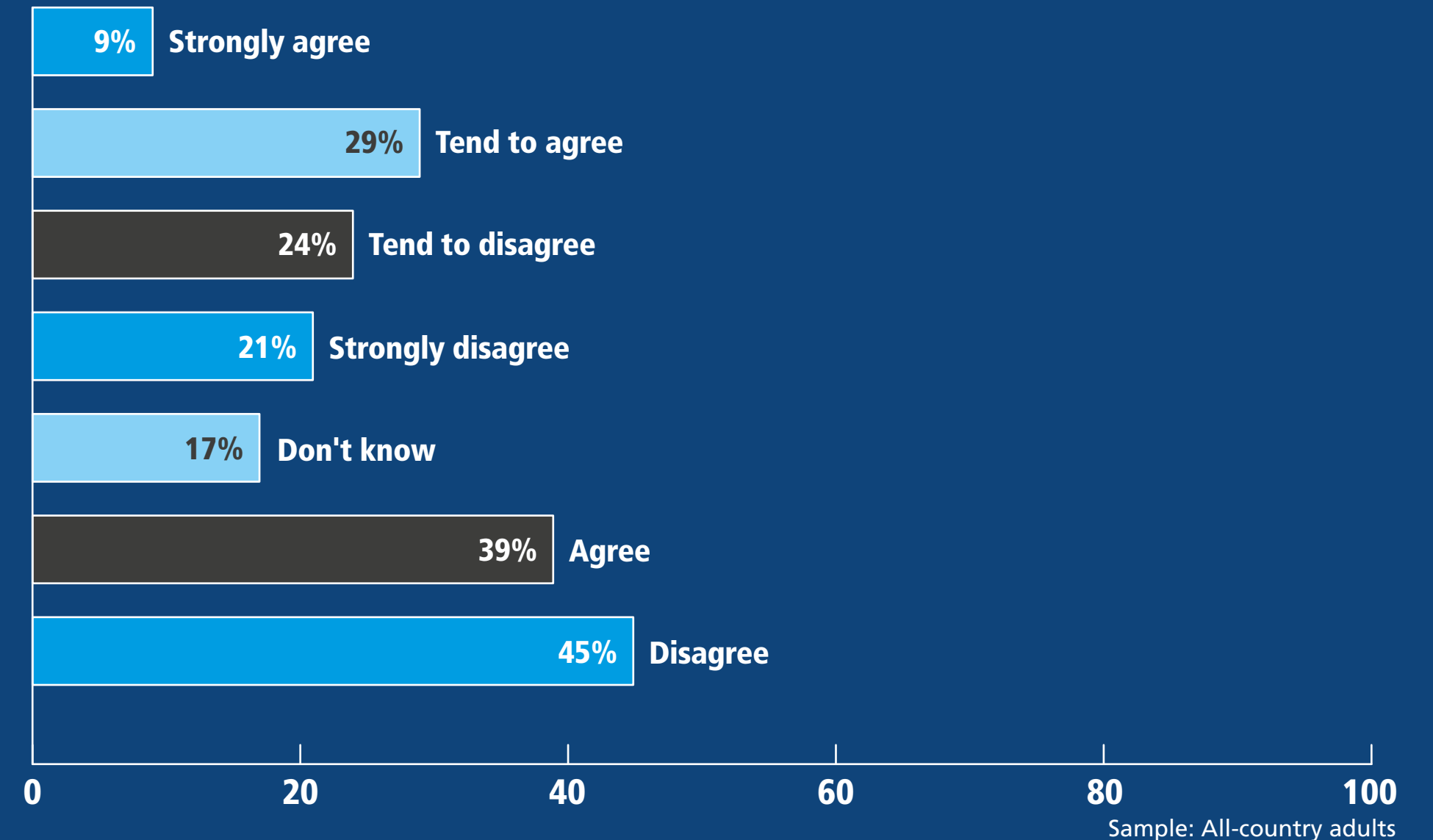
Who are e-bikes for?

People wanting to get out but fed up of being in a car **United Kingdom**

Results need to be viewed in the light of infrastructure change and development in each country and bear further local investigation. For example, 36% of UK respondents gave the answer that they felt “more cycling infrastructure to ensure safety” would encourage e-bike use, compared to 12 months ago. Which, when combined with the 49% of respondents who don’t think their local infrastructure has improved, paints a picture of why e-bike uptake may struggle in the UK. Alternatively, 43% of Polish respondents stated that more infrastructure was a factor in encouraging e-bike use and 56% say that it has improved in the last 12-months.

Making bikes welcome and part of the fabric of a city extends beyond installing cycle paths. Over a quarter of Europeans (26%) say that having more safe bike storage at home or work is a factor in encouraging e-bike use. This is consistent across all countries except for France (35%) and Spain (36%) and Germany (20%). As e-bikes are expensive to own this is a clear concern for many nationalities and is something that planners need to factor into new developments and infrastructure of the future.

THE CYCLING INFRASTRUCTURE HAS IMPROVED IN MY LOCAL AREA IN THE LAST 12 MONTHS



Georgia Yexley

General Manager UK and Ireland, TIER

Georgia Yexley has worked in the bike sharing space since its early inception and is the General Manager for the UK and Ireland at TIER, the world's largest shared mobility provider, operating in over 560 cities worldwide. She has experienced first hand the evolution of urban mobility in cities like Beijing and London and is committed to breaking down the barriers to cycling and creating more livable cities.

It is encouraging to see just how far the acceptance and adoption of e-bikes has come in the last few years. The findings of this report feel like a watershed moment, where the e-bike has been embraced across Europe as a viable and normalised mode of transport. This progression shifts focus from convincing gatekeepers on the accessibility advantages and mode shift impacts of e-bikes, to addressing the barriers to the broad and inclusive adoption of e-bikes and active travel.

Low on the list of factors encouraging e-bike usage, compared to 12 months ago, are progress of installing appropriate cycle infrastructure in cities across the continent, closely followed by affordable, accessible availability of the mode. As a provider of public shared micro-mobility services, TIER often enables members of the public to have the opportunity to try an e-bike for the first time, for example at our safety and training events.

There are two key moments you have the pleasure of witnessing when someone has their first go on an e-bike. First, there's the lightbulb moment where you see them 'get' the benefits of e-bikes. The second is the unmistakable e-bike grin on their face! That joy and fun is a great starting point, but what the State of the Nation research shows is that across the board people have come to accept e-bikes as useful mobility tools. In cities like London or Paris where the sheer scale of the city can make travelling by push bike intimidating, e-bikes offer a sustainable and quick way to get to work. We're encouraged to see further public investment in enabling this first ride.

Amongst our own user base our riders skew younger, and also more male and generally white, and this is similar across all of our markets. There are a range of factors behind this, but we know that shared modes of transport are more readily adopted by younger users, and owning

an e-bike is expensive and perceived as difficult if you live in a block of flats for example. In urban areas our customers use our e-bikes to go to the shops, visit friends or get to work, safe in the knowledge that they can park up and not have to worry about theft or charging.

With the barrier of public image around e-bikes lowered, the issue of sharing road space with cars and other vehicles comes to the fore. Unfortunately, around half (45%) of respondents in all countries report that infrastructure development has not improved in the last 12 months, despite the critical need for it in many countries. This is a shame as we know that a major barrier to active travel, especially amongst women and minority groups, is the fear of sharing road space with cars and other vehicles.

It is interesting to note that countries where cycling infrastructure is already fairly well established like the Netherlands don't think of infrastructure as important, possibly because they are already at a good baseline. Countries like Poland, France and the UK however do not have the same level of high quality safe segregated infrastructure, which could explain why they view infrastructure as more important.

What this report shows, and it echoes findings from research we are doing ourselves, is that public sentiment is much more in favour of the installation of segregated infrastructure than is widely believed or rather pitched in the media.

The need for improved cycling and micro-mobility focused infrastructure is high, especially if we want to improve the demographics of people who cycle and if we want to create urban landscapes where everyone can cycle safely.

"Countries where cycling infrastructure is already fairly well established like the Netherlands don't think of infrastructure as important, possibly because they are already at a good baseline."



Who do you think e-bikes are for?

Understanding people's perception of the target market for e-bikes

Environmentally conscious people and commuters are seen as the primary audiences for e-bikes followed by elderly people, budget conscious people and parents.

Europeans perceive e-bikes to be primarily for environmentally conscious people (52%), which in part shows an understanding of the role e-bikes can play in reducing motor vehicle use and congestion. This also reflects that lessening your environmental impact is seen as an encouraging factor in e-bike use.

Slightly behind environmentally conscious people were commuters (48% v. 52%), this demonstrates an understanding of e-bikes as a viable alternative to public transport or a personal motor vehicle for getting through the daily rush hour.

Only 38% of Europeans perceived E-bikes as being for elderly people but there were some significant variations between countries, in the Netherlands the figure was 65%. Parents – were the lowest ranking group across almost all countries except for Denmark and the Netherlands.

70%

of Spanish respondents think e-bikes are for commuters



65%

of Dutch respondents think e-bikes are for the elderly



14%

of Italians think e-bikes are for parents



56%

of women think e-bikes are for environmentally conscious people, as opposed to 46% of men



18-34

year olds are most likely to think e-bikes are for the budget conscious



41%

of older people 55+ think e-bikes are for the elderly





Who are e-bikes for?

People worried about the environment

United Kingdom

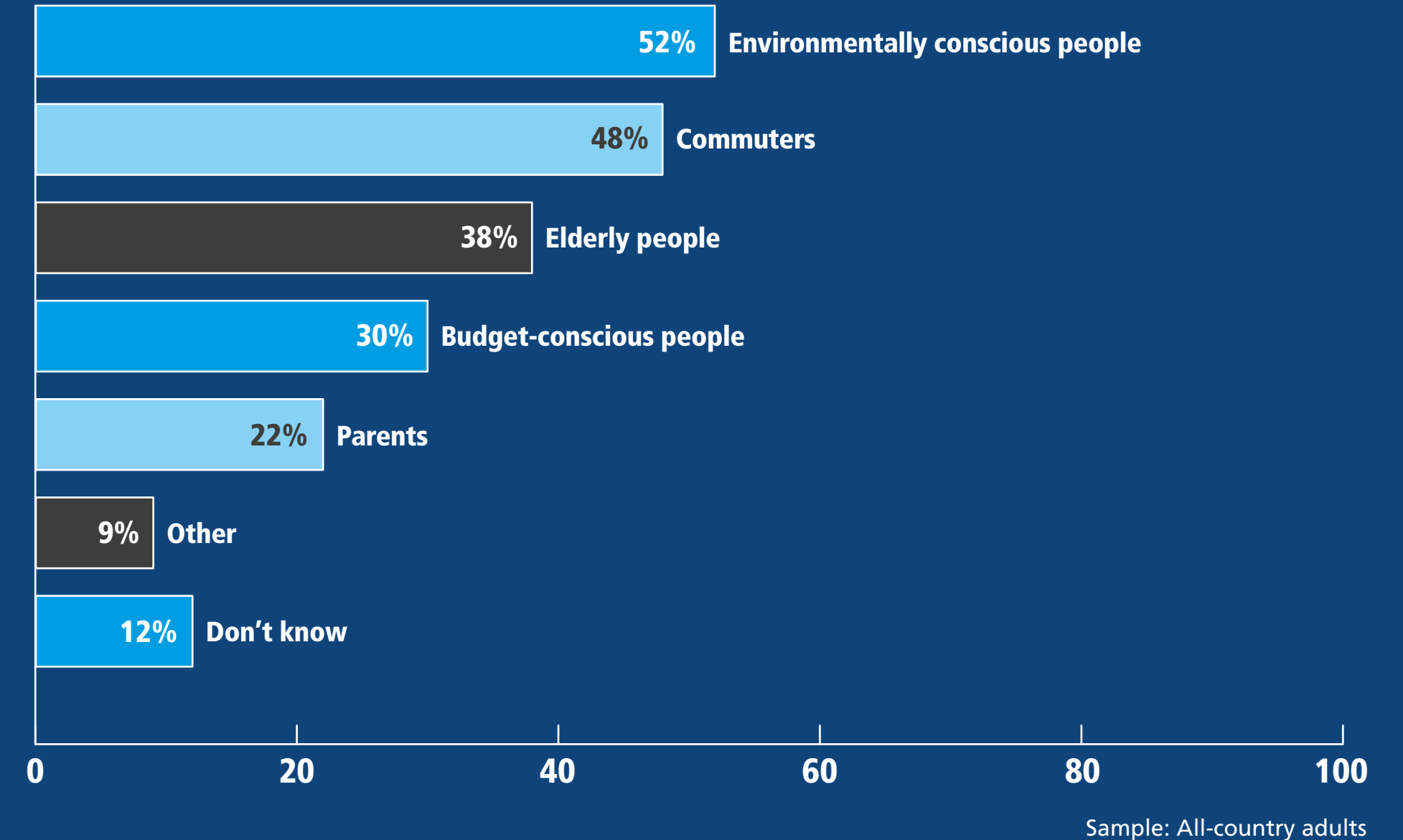
Despite Economic factors being perceived as the primary motivations to ride an e-bike – cost of living (47%) and purchase subsidies (41%) – there is a disconnect between that and who people perceive e-bikes are for, with only 30% considering them to be for budget conscious people. This may have arisen because people have the initial cost of purchasing an e-bike at the forefront of their mind (State of the Nation 2021 - 54% considered e-bikes being too expensive as a reason why people were less likely to buy or use an e-bike compared with before the covid-19 pandemic).

Of all the questions asked in this survey it was “Who are e-bikes for?” that had the most inter-country variation. While most countries placed “environmentally conscious people” as the primary group that e-bikes are for, Denmark and the Netherlands placed elderly people ahead of them, (55% and 65%, respectively). Interestingly, Denmark and the Netherlands did not consider lessening their environmental impact as a more important factor in encouraging e-bike purchase/hire (the European average was 33% but only 23% of Danish respondents and 24% of Dutch gave this answer).

This might reflect the normalcy of cycling in those countries, only 13% of Danish respondents did not own a bike, compared to 63% in the UK. If you are already cycling frequently on a conventional bike then an e-bikes does not lessen your environmental impact, if anything it increases it. Riding an e-bike only lessens your environmental impact when it replaces a journey otherwise taken by a motor vehicle. However the reverse was seen in Italy (65%), Poland (62%), Spain (60%), France (59%) and Switzerland (58%) where being environmentally conscious was by far the most given answer.

That only 22% of all respondents think e-bikes are for parents suggests that the family sized e-cargo bike has yet to hit the mainstream consciousness. France and Switzerland (both 27%) were top, with only 14% of Italians thinking e-bikes are for parents. It would be interesting to see how this relates to European e-cargo sales.

IN GENERAL, WHO DO YOU THINK E-BIKES ARE FOR?



Jim Cherrington

Senior Lecturer in Sport and Physical Activity, Sheffield Hallam University

Jim Cherrington is a sociologist and political ecologist who examines the interrelationships between cycling, environments, and societies. In particular, he is interested in how a range of identities, bodies, knowledge, and objects are mobilised in/through contemporary cycling cultures, with much of his recent work dedicated to investigating historical, technological, and political developments in recreational mountain biking. He is currently compiling an edited collection titled Mountain Biking, Culture and Society (Routledge, 2023). As well as having an academic interest in cycling, Jim is also an active member of Peak District MTB, an advocacy group for mountain bikers in the Peak District National Park.

This report by Shimano represents a huge leap forward in terms of our understanding of e-cyclists' motivations, as well as the social, environmental and political shifts that are required to integrate this technology into everyday living. The growth of e-bike sales offers a unique opportunity to explore a number of global health objectives, whilst implementing long-term and sustainable behaviour change. For example, data from this research suggests that e-bikes can, under the right circumstances, make commuting easier, cheaper, and more accessible than traditional modes of transport. The upshot of this is that commuting to work can be made more interesting and enjoyable (Bourne, 2020). Yet, until now, little has been done to address consumers reasons for buying e-bikes or the impact that such technologies may have on the culture of cycling and physical activity. My hope is this report, and others like it, will facilitate further interpretation of how riders experience, make sense of, and attach meaning to e-bikes, whilst helping to paint a more complex picture of future trends and developments.

As an e-bike user myself, I am acutely aware of the stigmas that are attached to e-bike technology, and the potential conflicts that can occur during its use. At the centre of this debate are legitimate concerns regarding the safety of pedestrians, the exclusivity of their usership, and the morality of assisted cycling. For instance, a large proportion of respondents (31%) remain concerned with the safety of existing infrastructure, and 41% of the respondents believe that better subsidies are needed to encourage e-bike purchase/use.

However, as a researcher with an interest in equality, diversity, and inclusion, I feel that these concerns must be weighed against the myriad physical and mental health benefits that e-bikes offer to those, such as the elderly or the disabled, whose participation in cycling might otherwise be limited by a traditional push bike (Cherrington, 2022). As such, I agree with many of the written comments from the survey, where it is suggested that e-bikes are useful in addressing physical and mental disabilities and can be an invaluable tool for 'people needing a little extra help to enjoy cycling'.

As one of the most significant social, cultural and economic catastrophes in our history, the COVID-19 pandemic has, for better and for worse, radically altered the global landscape of work, consumption, and travel. The world somehow feels smaller; in a relatively short amount of time, we have been exposed to issues relating to climate change, pollution, poverty, mental health, and obesity, which have changed the way we look at the world and the people in it. As a result, we seem more willing to experiment with ways of living and exercising that would have otherwise seemed unthinkable only two or three years ago. Individuals who have never ridden a bike are cycling to work and for leisure for the first time, non-assisted cyclists are switching to e-bikes, and all kinds of people have had their passion for cycling reignited because of emerging e-bike technologies. This has led to unprecedented changes to cycling and e-cycling provision in some countries, including an increase in the cap on government backed cycle-to-work schemes, restrictions on motor vehicles, and large swathes of urban space being reserved exclusively for bicycles (Buehler, 2022). But as the dust settles, and the e-bike industry celebrates one of its most successful years to date, it is important that we continue to capitalise upon this success, whilst looking towards practical, long-term, and sustainable cycling solutions that are built around education and infrastructure. Doing so will ensure that e-bikes are more fully integrated into the fabric of every European city, which will, in turn, contribute to healthier, happier, and more active populations.

References

- Bourne, J., Sauchelli, S., Perry, R., Page, A., Leary, S., England, C., and Cooper, A. Health benefits of electrically-assisted cycling: a systematic review. *International Journal of Behavioral Nutrition and Physical Activity*.15. 116.
- Buehler, R., and Pucher, J. (2022). Cycling through the COVID-19 Pandemic to a More Sustainable Transport Future: Evidence from Case Studies of 14 Large Bicycle-Friendly Cities in Europe and North America. *Sustainability*. 14. 7293.
- Cherrington, J. (2022). Electric Mountain Bikes, Ableism, and 'Enwheelment' in Outdoor Leisure. In M. Baker and Carr, N (eds). *Inclusion and Equity in Outdoor Leisure: Who's Body Belongs?*. Wallingford: CABI.



"E-bikes are useful in addressing physical and mental disabilities and can be an invaluable tool for 'people needing a little extra help to enjoy cycling'"

Importance of bike shops and bike servicing

How often do Europeans visit bike shops and their reasons for servicing

A quarter of those who own bikes plan to get their bikes serviced in the next six months but bike ownership is far from universal amongst Europeans.

By asking how many Europeans plan to visit a bike shop to have their bike serviced, the survey also revealed the number of Europeans who do not own a bike. 41% of those asked do not own a bike, with some countries showing significantly less bike ownership than the European average. In the UK 63% do not own a bike and in France it is 51%. The Netherlands has the highest number of bike owners with just 13% responding that they do not own a bike.

When the 2021 State of The Nation Report asked a similar question, "How likely, if at all, are you to visit a bike shop to get your bike serviced over the next twelve months," 30% responded that they did not own a bike, suggesting that European bike ownership has decreased.

The Dutch are the most dedicated to bike shops and bike servicing with 48% of those with bikes saying they are likely to get their bike serviced in the next 6 months, in the UK it is only 10%. 24% of Norwegians say they are "not at all likely" to visit a bike shop in the next 6 months. However, this first question does not reveal which nations are expert home mechanics and which ones are unaware of the need for regular servicing.

2 in 5

Europeans do not own a bike



48%

of Europeans aged 55+ do not own bike



63%

of UK respondents do not own a bike



1 in 4

Europeans are likely to get their bike serviced in the next 6-months

51%*

of bike owners say servicing is important for keeping their bike in good condition



12%*

only visit a service centre when their bike breaks



*of bike owners who are likely to get their bike serviced in the next 6 months



When do you visit a bike shop to get your bike serviced?

When my bike makes noise and needs to be tightened

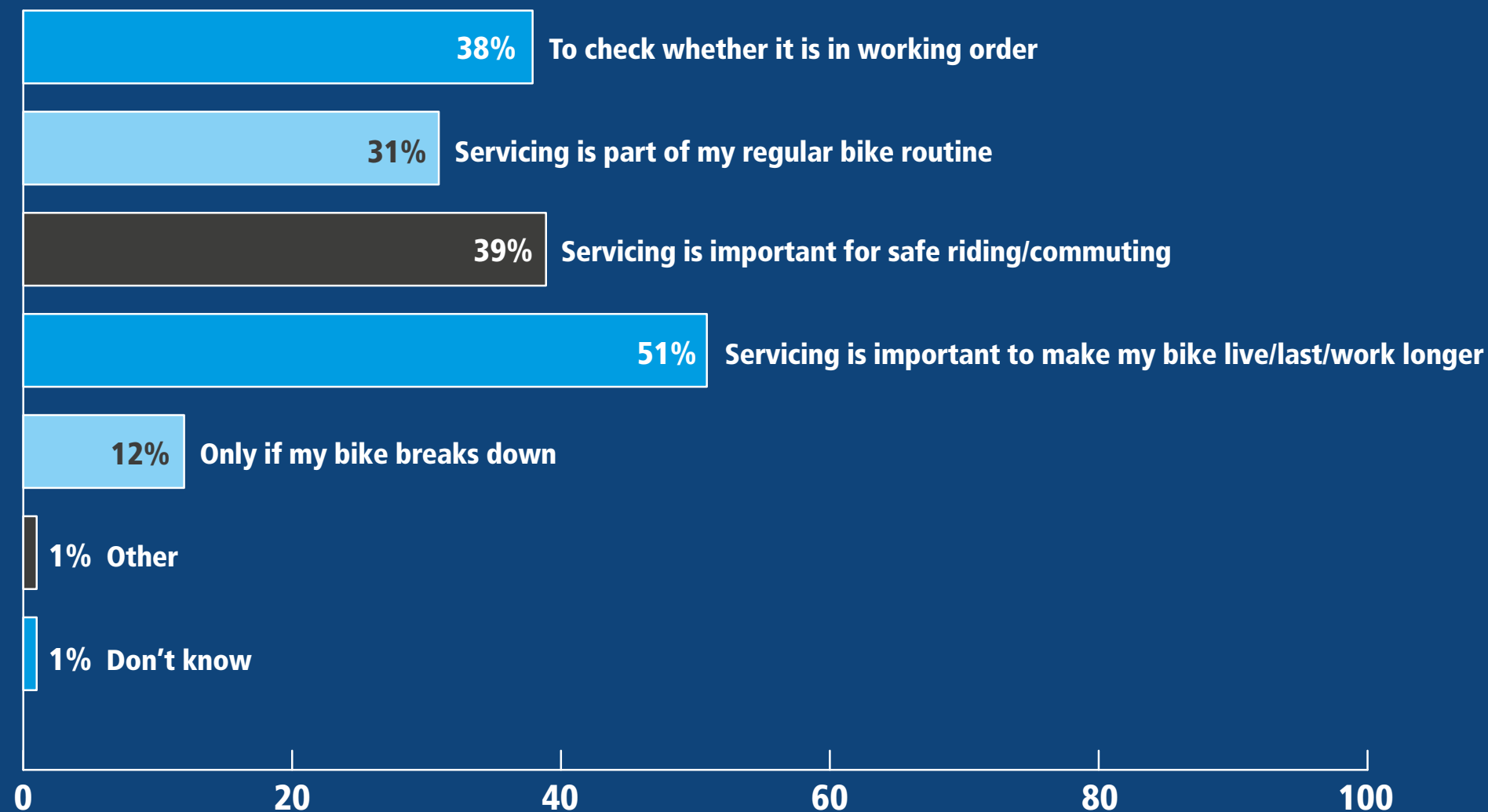
Denmark

Understanding the reasons why people are likely to visit a bike shop to get their bike serviced can help us to better see the gaps in education around bike service needs.

Of Europeans who are likely to get their bike serviced in the next 6 months, 51% recognise the importance of regular servicing to help make their bike last longer, but only 31% say that getting a service is part of their regular routine, with this dropping to 28% amongst females in this category. Pleasingly it is only a minority, 12%, who visit a bike shop only once their bike has broken down. Though Sweden is the exception with 21% waiting until there is a problem to visit a mechanic.

Helping your bike to last longer seems more of a motivating factor for regular bike maintenance than safety, 39% recognise that servicing is part of safe riding and commuting, but this is lowest (28%) amongst 18-24 year olds. Appealing to riders pockets with the cost-saving benefits of regular maintenance may get more positive results than focusing on safety.

REASONS FOR GETTING BIKE SERVICED



Sample: All-country adults

Didac Sabaté

Co-Founder PANOT Mobility

Didac Sabaté spent 10 years as Marketing Manager for SCOTT Spain.

He launched PANOT Mobility in September 2021 with the aim of offering sustainable mobility solutions for new cities. PANOT's mission is to contribute to the ecological transition by accelerating the adoption of new mobility models, models that are already working successfully in other European countries.

Urban mobility is changing and although, at present, we can consider that the adoption of e-bikes as an alternative to private motor vehicles and other means of transport is good, I believe that we are in the midst of a process of change. Changes that paint a very positive picture for the expansion of e-bikes as the main means of transport in cities.

The potential for growth is still very large and there are many factors that facilitate their expansion. Urban mobility planning in many cities is unsustainable and has collapsed from the point of view of conventional private transport, leading to complete saturation of roads and an unsustainable traffic situation. In this scenario, the e-bike is positioned as one of the best alternatives to traffic jams. The possibility of gaining time lost in everyday life is an increasingly appreciated advantage.

The COVID pandemic has prompted a change of habits in a significant part of society, and official bodies have accelerated a series of changes in urban infrastructures that favour the use of the bicycle and penalise, even more, the daily use of the private car. A new mobility culture is reaching beyond conventional cyclists and into the population base not directly related to cycling, a sector where the real potential for growth in terms of urban e-bike users lies.

The rising cost of energy also adds to the list of factors that make the urban e-bike one of the best options for short and medium distance journeys. The economic savings that can be made is, in itself, a great point in favour of e-bikes.

Personally, I feel this is a favourable situation for the use of e-bikes in urban journeys and to all these advantages (economic, environmental, time optimisation) I would add that of wellbeing and improvement in health, both physically and mentally. I am the father of two daughters and every

morning I make the journey to school with them on our PANOT e-bike. It is something that has changed our lives and has allowed all three of us to start the day in a more positive, happy and active way.

One aspect to consider is the safety of cycling in urban environments. In Spain, this is one of the major barriers to the adoption of cycling as a means of transport. Only improvements in infrastructure and road safety education can break down this wall that is holding back part of the population from changing their mobility habits.

The rise of urban e-bikes and the increasing number of users also brings with it a series of duties for the sector. Once the users have been recruited, we must be able to make them loyal to the use of bicycles in their daily lives. To this end, it is essential to raise awareness of the importance of keeping their bicycles in perfect condition at all times. The reliability, resistance and safety of bicycles must be a priority, as in practice it can make the difference between a good or bad experience.

A large and professional network of official and authorised workshops is essential to ensure sustainable growth in the sector. We need to work on raising awareness of the importance of correct maintenance and, in this sense, I think it is important to look at the dynamics of other sectors with a longer track record and where the concept of preventive mechanics, going for maintenance before problems occur and to prevent them from happening, is a pillar of their strategy. Automating and facilitating information on when, how and where to perform maintenance is very important for the overall user experience to remain positive over time. And it also allows users to understand, from their arrival in the world of urban e-bikes, that preventive maintenance is part of their cycle of use.

Although there are many challenges to be faced, the urban e-bike is going through its best moment and has a great margin for growth, currently boosted by a series of external factors that place it as the solution to a large part of the problems of urban mobility.



“it is essential to raise awareness of the importance of keeping bicycles in perfect condition at all times. The reliability, resistance and safety of bicycles must be a priority, as in practice it can make the difference between a good or bad experience.”

Marek Kimiecik

Marketing and Product Director – Kross Poland

The State of the Nation research and reports are one of the most valuable sources of knowledge for our industry, especially for marketing divisions.

There are some issues concerning infrastructure which go beyond urban commuting infrastructure only. In Poland, bike riding centres and bike parks are developing rapidly. It is happening not only in mountain areas, where investors actively transform ski resorts to summer bike attractions, but also in more urbanised areas where new pump tracks or bike skill parks are built. In some areas these parks become local bike micro-community centres which is important for developing new bike culture in our country.

Developing touristic bike routes in non-urban areas and bike-friendly infrastructure (combined with the rapidly growing e-bike market) also allows us to use bicycles in various new ways. Recreation was always the main reason for Poles to use a bicycle but thanks to new investments on the field of touristic infrastructure - sightseeing by bike or vacation on bike has become much easier and safer.

During our last qualitative research, we also realized that an e-bike, especially in the mountain areas, gives a rider some independence from the infrastructural conditions. An MTB e-bike allows users to access hiking routes which are not prepared for bike usage. Therefore, an e-bike gives a boost not only to rider's range and ability to reach more altitude but also to successfully complete routes unavailable or very hard to overcome before.

Nevertheless, the recreation segment (city, trekking, cross & ATB, also for e-bikes) remains the highest in volume for our local market. Urban infrastructure plays an important role for city commuting which wasn't very popular in Poland until cities started to develop their own bicycle road networks in greater scale. Polish Critical Mass, which was a main lobby for developing bicycle infrastructure, stopped monthly manifestations in 2016. The community stated that their main goals were reached because the voice of bikers is finally being heard by local authorities.

The legal perspective is also interesting to explore. Polish law and regulations seem to be an obstacle in increasing interest in individual micro-mobility, especially e-bikes. Unfortunately, our country has no national bike-strategy, so developing bike infrastructure is mainly in the hands of

local authorities. In effect this situation causes discrepancies between particular agglomerations in quality of infrastructure and pace of its development. It would be interesting to explore how cyclists from various countries assess the quality and development of different kinds of infrastructure in their areas.

Legal regulations in various countries, combined with infrastructure quality may also affect user's sense of safety. For instance, the law obliges cyclists in Poland to use roads for cars if there is no bike road or lane available. Using pavement is allowed only when riding together with a child, during hard weather conditions or on roads with speed limit higher than 50 km (but at the same time the pavement area must be wide enough). Cyclists tend to bend these rules because drivers in our country often don't respect speed limits and safe distance when overtaking a cyclist. Lack of infrastructure (or its poor quality) together with unfavorable legal regulations and a poor sense of safety may strongly affect the decision of choosing a bicycle as a mode of everyday transportation.

One of the important arguments against buying an e-bike and using it for commuting in Poland is fear of its loss through theft or fear of its damage due to weather conditions. Therefore, access to a safe parking place in the city or even a bike shed may also play a role. In Polish cities safe parking for bikes is provided mainly by technological parks or business centers and as far as I know there is only one automatic underground bike parking in the city of Warsaw.

On the topic of bike servicing: Polish e-bike market is still in its initial phase of development, so mainstream bikers have a very basic knowledge about servicing an e-bike (or no knowledge at all), therefore access to proper service is less often considered during the decision-making process when buying an e-bike



“Urban infrastructure plays an important role for city commuting which wasn’t very popular in Poland until cities started to develop their own bicycle road networks in greater scale.”

While the impacts of the COVID-19 pandemic have lingered on there are new concerns on the minds of Europeans, primarily the cost of living and the environment. Some of the promises of a better ‘new normal’ have not materialised as many Europeans remain dissatisfied by cycling infrastructure improvements in their local area. We can now look fondly back to the time of the rapidly installed ‘COVID-19 cycle lanes’ that supported the sudden increase in cycling during the pandemic. Now, many feel that more cycling infrastructure will encourage more e-bike use and this continues to be an issue for cycling advocacy in most countries.

Another benefit of the COVID-19 pandemic was the recognition of cycle shops as “essential.” This year we looked at opinions and attitudes towards the use of bike shops and service centres and while results were not universal it is encouraging to see that many consumers recognise the importance of bike servicing to safety and to the longevity of their bicycle, however with only 25% of bike owners saying they will visit a bike shop in the next 6 months, there is work to be done to build those relationships.

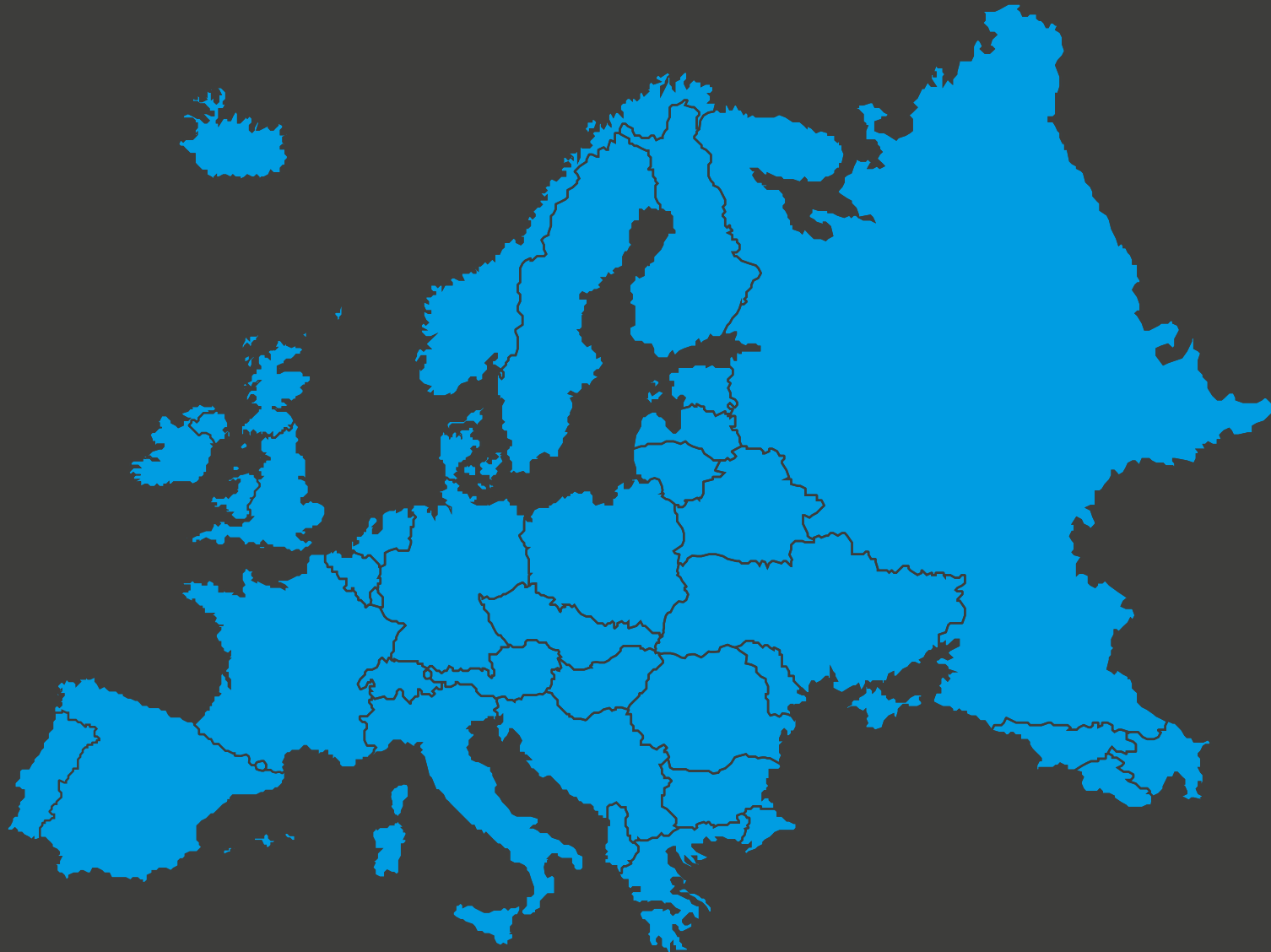
We asked the question ‘who are e-bikes for’ and found the answers enlightening. E-bikes are perceived to be for those with environmental concerns, commuters and for the elderly, but there are interesting variations between countries that bear further investigation. Understanding this can be pivotal in the way we educate the public on e-bike use. The information contained in this report will undoubtedly contribute towards our own learning. We sincerely hope everyone interested in e-bikes — from industry partners, researchers and consumers — can learn from it too.

Data Collection Method

All figures, unless otherwise stated, are from YouGov Plc. Total sample size was 15,792 adults in the UK, Spain, France, Germany, Netherlands, Italy, Austria, Sweden, Norway, Denmark, Poland and Switzerland. Fieldwork was undertaken between 17th -25th August 2022. The survey was carried out online. The figures have been given an even weighting for each country to produce an ‘average’ value.

For Shimano’s other e-bike studies visit: <https://media.shimano-eu.com/en-CEU/tags/e-bikes>

Survey commissioned by Shimano Europe
Report compiled and edited by Fusion Media
Designed by Diecast Design
Published September 2022



Europe

1. For the following question, by “cycling infrastructure”, we mean transportation systems and services that are designed to be safe and usable for bicycles. To what extent do you agree or disagree with the following statement? “The cycling infrastructure has improved in my local area in the last 12 months”.

RESPONSE	TOTAL	Age					Gender	
		18-24	25-34	35-44	45-54	55+	Male	Female
Strongly agree	9%	9%	11%	11%	9%	9%	10%	9%
Tend to agree	29%	33%	31%	29%	28%	29%	32%	27%
Tend to disagree	24%	25%	24%	23%	23%	24%	24%	23%
Strongly disagree	21%	14%	17%	21%	24%	22%	20%	22%
Don't know	17%	18%	18%	16%	16%	16%	14%	19%
Net: Agree	39%	42%	41%	39%	37%	38%	42%	36%
Net: Disagree	45%	39%	41%	44%	47%	46%	44%	45%

2. Which, if any, of the following do you think might encourage somebody to buy or hire an e-bike more now, compared to 12 months ago? (Please select all that apply)

RESPONSE	TOTAL	Age					Gender	
		18-24	25-34	35-44	45-54	55+	Male	Female
More cycling infrastructure to ensure safety	31%	28%	30%	31%	30%	32%	31%	31%
More education around the benefits of e-bikes for all types of people	17%	19%	16%	14%	15%	18%	17%	16%
Awareness as to how it might improve their personal health and fitness	32%	33%	29%	29%	31%	35%	30%	34%
An e-bike subsidy	41%	34%	41%	43%	45%	40%	41%	41%
More safe storage in their home/ workplace	26%	27%	27%	26%	27%	26%	26%	27%
The cost of living (e.g. higher car fuel prices)	47%	44%	49%	47%	47%	47%	43%	51%
Looking to commute or travel by bike to avoid COVID-19	18%	18%	17%	18%	18%	18%	17%	19%
Knowing that it would lessen their environmental impact	33%	37%	32%	32%	32%	34%	30%	36%
None of these	11%	7%	8%	10%	13%	12%	12%	9%
Don't know	9%	8%	8%	8%	8%	9%	8%	9%

3. In general, who do you think e-bikes are for? (Please select all that apply)

RESPONSE	TOTAL	Age					Gender	
		18-24	25-34	35-44	45-54	55+	Male	Female
Commuters	48%	47%	49%	51%	49%	47%	47%	49%
Parents	22%	25%	27%	25%	22%	18%	21%	23%
Elderly people	38%	33%	37%	36%	37%	41%	40%	37%
Environmentally-conscious people	52%	48%	49%	51%	52%	55%	48%	56%
Budget-conscious people	30%	32%	32%	30%	28%	29%	28%	31%
Other	9%	5%	7%	9%	10%	10%	9%	9%
Don't know	12%	13%	11%	13%	13%	13%	12%	13%

4. For the following question, if you do not own a bike, please select the “Not applicable” option. Thinking about the next six months (i.e. before February 2023)... How likely, if at all, are you to visit a bike shop to get your bike serviced?

RESPONSE	TOTAL	Age					Gender	
		18-24	25-34	35-44	45-54	55+	Male	Female
Very Likely	9%	10%	9%	10%	9%	9%	10%	8%
Fairly likely	16%	18%	20%	19%	16%	13%	18%	14%
Not very likely	15%	21%	18%	16%	15%	13%	17%	14%
Not at all likely	14%	15%	13%	15%	16%	14%	15%	14%
Don't know	4%	5%	5%	5%	5%	3%	4%	4%
Not applicable - I do not own a bike	41%	31%	34%	35%	39%	48%	35%	46%
Net: Likely	25%	27%	29%	29%	26%	22%	29%	22%
Net: Not likely	30%	37%	31%	31%	31%	27%	32%	27%

5. You previously told us that you are likely to get your bike serviced in the next six months... Which, if any, of the following are reasons for this? (Please select all that apply)

RESPONSE	TOTAL	Age					Gender	
		18-24	25-34	35-44	45-54	55+	Male	Female
To check whether it is in working order (i.e. in case something has gone wrong)	38%	34%	39%	40%	37%	38%	38%	38%
Servicing is part of my regular bike routine	31%	24%	26%	32%	31%	36%	34%	28%
Servicing is important for safe riding/ commuting	39%	28%	39%	41%	40%	41%	38%	40%
Servicing is important to make my bike live/ last/ work longer	51%	39%	42%	46%	53%	60%	50%	52%
Only if my bike breaks down	12%	13%	14%	11%	12%	10%	10%	13%
Other	1%	1%	1%	1%	2%	2%	1%	2%
Don't know	1%	1%	2%	1%	1%	1%	1%	1%



Austria

1. For the following question, by “cycling infrastructure”, we mean transportation systems and services that are designed to be safe and usable for bicycles. To what extent do you agree or disagree with the following statement? “The cycling infrastructure has improved in my local area in the last 12 months”.

RESPONSE	TOTAL	Age					Gender	
		18-24	25-34	35-44	45-54	55+	Male	Female
Strongly agree	11%	11%	11%	11%	12%	10%	12%	10%
Tend to agree	32%	35%	27%	29%	28%	37%	33%	31%
Tend to disagree	27%	30%	27%	24%	24%	29%	25%	29%
Strongly disagree	17%	10%	21%	23%	21%	14%	18%	17%
Don't know	12%	13%	13%	13%	15%	10%	11%	13%
Net: Agree	43%	46%	38%	39%	40%	47%	45%	41%
Net: Disagree	45%	40%	49%	47%	45%	43%	43%	46%

2. Which, if any, of the following do you think might encourage somebody to buy or hire an e-bike more now, compared to 12 months ago? (Please select all that apply)

RESPONSE	TOTAL	Age					Gender	
		18-24	25-34	35-44	45-54	55+	Male	Female
More cycling infrastructure to ensure safety	24%	27%	21%	25%	21%	26%	25%	23%
More education around the benefits of e-bikes for all types of people	16%	19%	18%	10%	19%	16%	18%	14%
Awareness as to how it might improve their personal health and fitness	41%	37%	36%	41%	36%	46%	38%	44%
An e-bike subsidy	38%	42%	36%	42%	42%	34%	37%	39%
More safe storage in their home/ workplace	25%	25%	22%	24%	25%	28%	26%	25%
The cost of living (e.g. higher car fuel prices)	48%	47%	51%	52%	44%	47%	47%	49%
Looking to commute or travel by bike to avoid COVID-19	17%	12%	15%	17%	15%	20%	15%	20%
Knowing that it would lessen their environmental impact	39%	41%	35%	42%	31%	41%	34%	43%
None of these	11%	5%	7%	11%	14%	11%	13%	9%
Don't know	5%	8%	5%	3%	5%	5%	4%	5%

3. In general, who do you think e-bikes are for? (Please select all that apply)

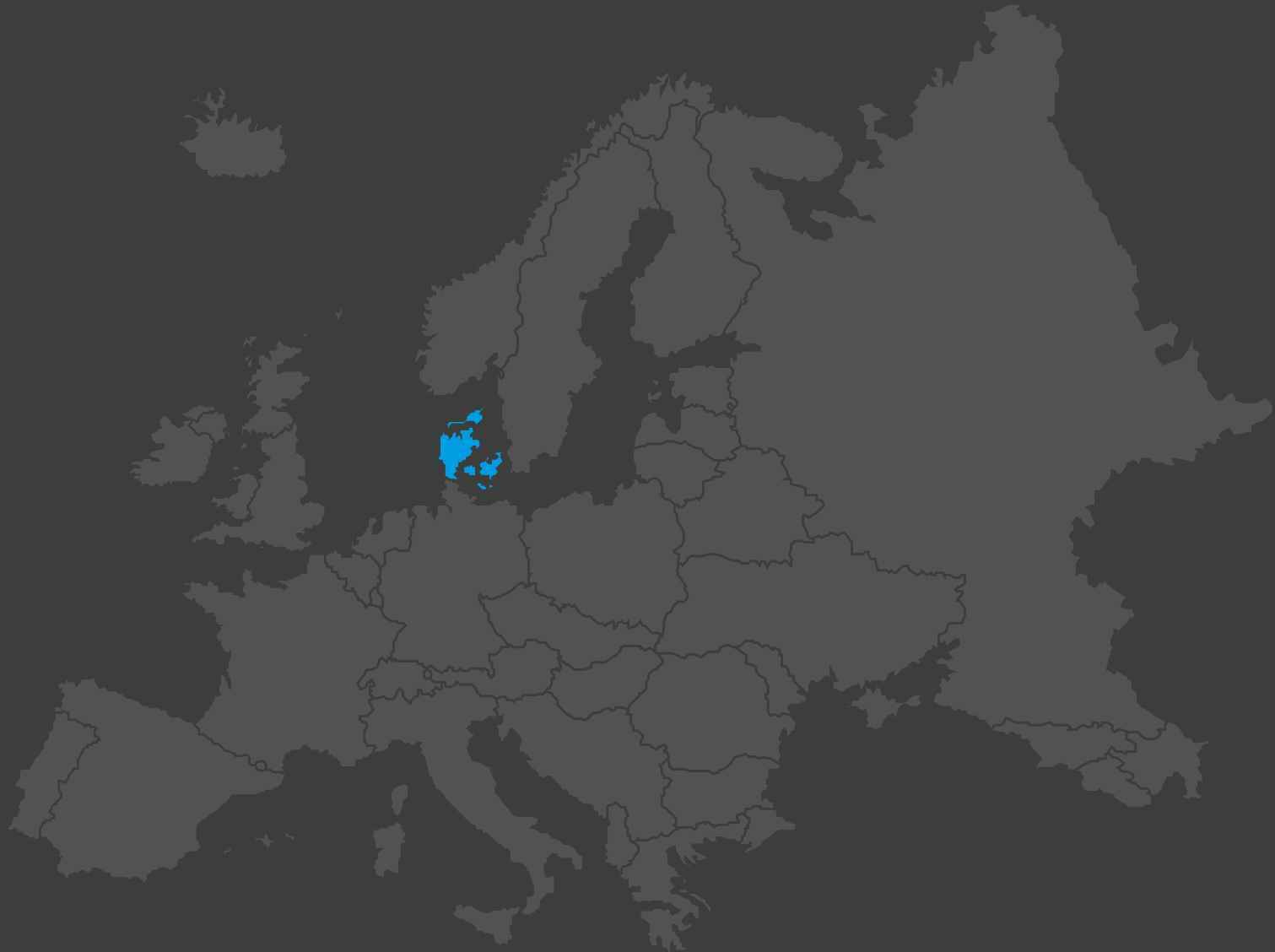
RESPONSE	TOTAL	Age					Gender	
		18-24	25-34	35-44	45-54	55+	Male	Female
Commuters	34%	43%	35%	37%	36%	30%	33%	36%
Parents	19%	28%	27%	27%	15%	12%	17%	21%
Elderly people	52%	48%	57%	53%	45%	53%	53%	51%
Environmentally conscious people	52%	49%	45%	53%	46%	57%	51%	53%
Budget-conscious people	22%	31%	22%	23%	16%	23%	22%	23%
Other	8%	7%	5%	7%	9%	9%	8%	8%
Don't know	10%	10%	8%	13%	12%	10%	10%	11%

4. For the following question, if you do not own a bike, please select the “Not applicable” option. Thinking about the next six months (i.e. before February 2023)... How likely, if at all, are you to visit a bike shop to get your bike serviced?

RESPONSE	TOTAL	Age					Gender	
		18-24	25-34	35-44	45-54	55+	Male	Female
Very likely	13%	12%	12%	12%	10%	14%	11%	14%
Fairly likely	19%	11%	19%	21%	21%	19%	21%	17%
Not very likely	17%	24%	18%	15%	16%	16%	19%	15%
Not at all likely	14%	16%	15%	20%	13%	11%	16%	12%
Don't know	4%	2%	5%	6%	3%	3%	3%	4%
Not applicable - I do not own a bike	34%	34%	31%	25%	36%	37%	29%	38%
Net: Likely	31%	24%	31%	33%	31%	33%	32%	31%
Net: Not likely	31%	40%	33%	35%	29%	27%	36%	26%

5. You previously told us that you are likely to get your bike serviced in the next six months... Which, if any, of the following are reasons for this? (Please select all that apply)

RESPONSE	TOTAL	Age					Gender	
		18-24 (n=23)	25-34	35-44	45-54	55+	Male	Female
To check whether it is in working order (i.e. in case something has gone wrong)	42%	31%	45%	48%	45%	40%	40%	44%
Servicing is part of my regular bike routine	34%	30%	27%	33%	28%	41%	30%	38%
Servicing is important for safe riding/ commuting	47%	39%	39%	44%	43%	53%	45%	48%
Servicing is important to make my bike live/ last/ work longer	57%	52%	55%	46%	57%	63%	55%	59%
Only if my bike breaks down	7%	9%	6%	10%	10%	5%	8%	6%
Other	1%	-	-	4%	-	1%	1%	1%
Don't know	0%	4%	-	-	-	-	-	1%



Denmark

1. For the following question, by “cycling infrastructure”, we mean transportation systems and services that are designed to be safe and usable for bicycles. To what extent do you agree or disagree with the following statement? “The cycling infrastructure has improved in my local area in the last 12 months”.

RESPONSE	TOTAL	Age					Gender	
		18-24	25-34	35-44	45-54	55+	Male	Female
Strongly agree	5%	3%	6%	5%	2%	6%	6%	4%
Tend to agree	27%	36%	29%	23%	22%	28%	31%	23%
Tend to disagree	22%	31%	29%	21%	22%	18%	25%	20%
Strongly disagree	23%	5%	15%	34%	32%	25%	22%	25%
Don't know	22%	24%	22%	19%	22%	23%	17%	28%
Net: Agree	32%	40%	35%	27%	25%	34%	37%	27%
Net: Disagree	46%	36%	43%	54%	53%	43%	46%	45%

2. Which, if any, of the following do you think might encourage somebody to buy or hire an e-bike more now, compared to 12 months ago? (Please select all that apply)

RESPONSE	TOTAL	Age					Gender	
		18-24	25-34	35-44	45-54	55+	Male	Female
More cycling infrastructure to ensure safety	29%	27%	28%	28%	29%	31%	27%	32%
More education around the benefits of e-bikes for all types of people	20%	21%	15%	14%	20%	25%	22%	19%
Awareness as to how it might improve their personal health and fitness	24%	21%	20%	11%	23%	29%	27%	20%
An e-bike subsidy	35%	32%	32%	47%	42%	30%	33%	36%
More safe storage in their home/ workplace	24%	37%	21%	29%	24%	22%	23%	25%
The cost of living (e.g. higher car fuel prices)	42%	42%	40%	48%	47%	40%	38%	47%
Looking to commute or travel by bike to avoid COVID-19	18%	13%	17%	19%	17%	20%	19%	18%
Knowing that it would lessen their environmental impact	23%	33%	25%	16%	24%	22%	21%	25%
None of these	8%	6%	9%	8%	8%	8%	9%	7%
Don't know	12%	9%	13%	12%	9%	15%	11%	14%

3. In general, who do you think e-bikes are for? (Please select all that apply)

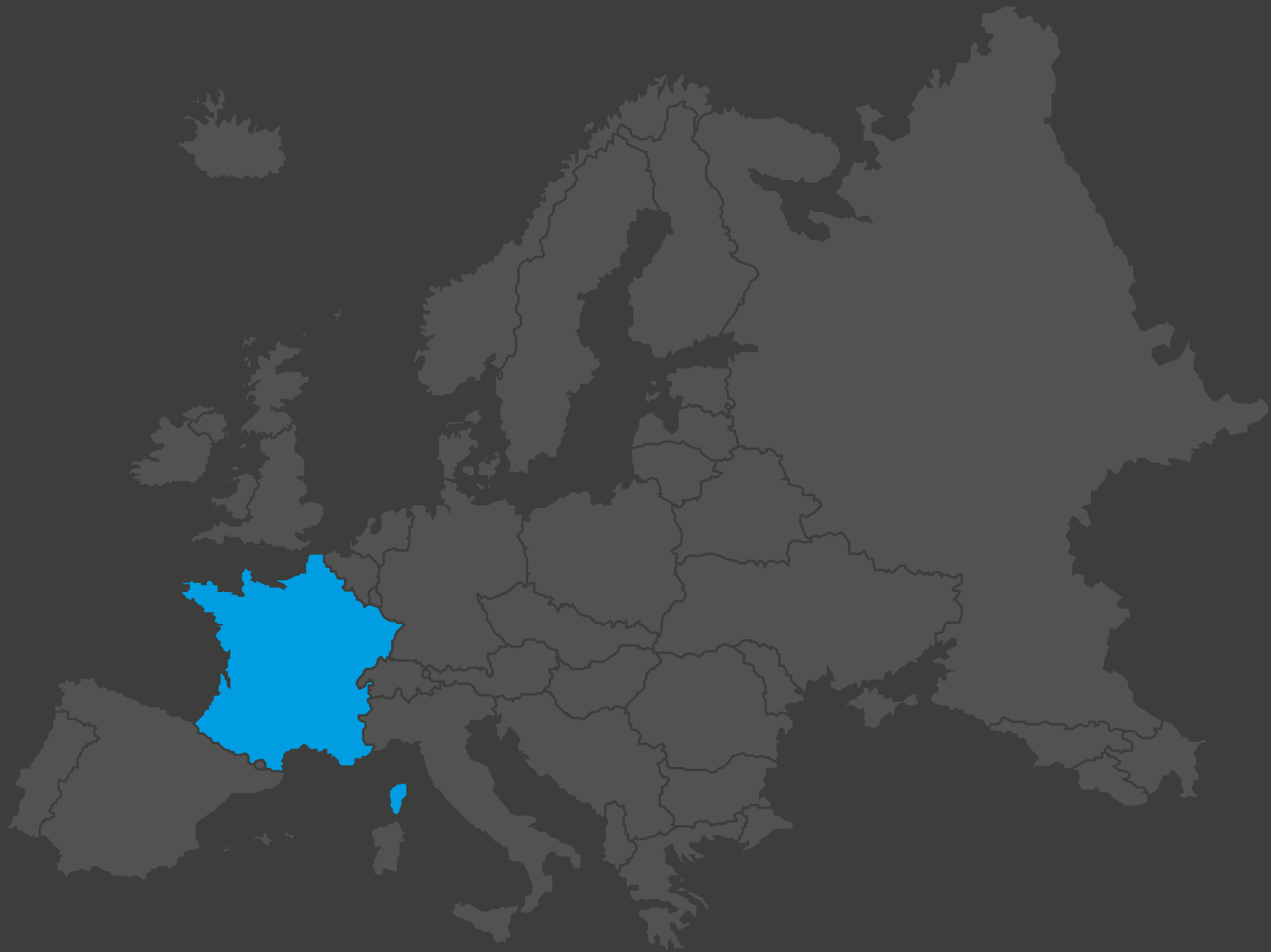
RESPONSE	TOTAL	Age					Gender	
		18-24	25-34	35-44	45-54	55+	Male	Female
Commuters	43%	33%	40%	45%	41%	47%	43%	43%
Parents	25%	23%	35%	29%	27%	18%	23%	27%
Elderly people	55%	43%	47%	56%	57%	61%	56%	54%
Environmentally-conscious people	41%	41%	33%	33%	44%	46%	38%	45%
Budget-conscious people	21%	21%	25%	19%	21%	19%	19%	23%
Other	7%	5%	3%	6%	14%	8%	7%	8%
Don't know	12%	11%	15%	16%	11%	10%	11%	13%

4. For the following question, if you do not own a bike, please select the “Not applicable” option. Thinking about the next six months (i.e. before February 2023)... How likely, if at all, are you to visit a bike shop to get your bike serviced?

RESPONSE	TOTAL	Age					Gender	
		18-24	25-34	35-44	45-54	55+	Male	Female
Very likely	9%	5%	6%	6%	14%	10%	9%	9%
Fairly likely	17%	25%	25%	17%	13%	13%	20%	14%
Not very likely	18%	14%	24%	23%	13%	17%	19%	18%
Not at all likely	16%	19%	12%	11%	21%	16%	18%	13%
Don't know	4%	8%	4%	5%	5%	2%	3%	4%
Not applicable - I do not own a bike	37%	29%	29%	38%	35%	42%	31%	42%
Net: Likely	26%	30%	30%	23%	27%	23%	29%	23%
Net: Not likely	34%	33%	36%	34%	33%	33%	36%	31%

5. You previously told us that you are likely to get your bike serviced in the next six months... Which, if any, of the following are reasons for this? (Please select all that apply)

RESPONSE	TOTAL	Age					Gender	
		18-24	25-34	35-44	45-54	55+	Male	Female
To check whether it is in working order (i.e. in case something has gone wrong)	36%	32%	37%	27%	46%	35%	34%	39%
Servicing is part of my regular bike routine	36%	41%	23%	38%	33%	43%	38%	32%
Servicing is important for safe riding/ commuting	37%	12%	39%	41%	41%	40%	31%	45%
Servicing is important to make my bike live/ last/ work longer	47%	37%	40%	47%	61%	48%	42%	53%
Only if my bike breaks down	8%	12%	10%	7%	6%	6%	5%	11%
Other	3%	-	-	-	9%	3%	-	6%
Don't know	1%	-	1%	-	-	2%	1%	1%



France

1. For the following question, by “cycling infrastructure”, we mean transportation systems and services that are designed to be safe and usable for bicycles. To what extent do you agree or disagree with the following statement? “The cycling infrastructure has improved in my local area in the last 12 months”.

RESPONSE	TOTAL	Age					Gender	
		18-24	25-34	35-44	45-54	55+	Male	Female
Strongly agree	14%	13%	19%	16%	11%	13%	14%	14%
Tend to agree	35%	40%	34%	32%	37%	35%	37%	34%
Tend to disagree	22%	21%	20%	22%	24%	22%	23%	21%
Strongly disagree	20%	14%	19%	19%	20%	23%	18%	22%
Don't know	9%	11%	9%	11%	8%	7%	8%	9%
Net: Agree	49%	53%	53%	48%	48%	48%	51%	47%
Net: Disagree	42%	35%	38%	41%	44%	45%	41%	43%

2. Which, if any, of the following do you think might encourage somebody to buy or hire an e-bike more now, compared to 12 months ago? (Please select all that apply)

RESPONSE	TOTAL	Age					Gender	
		18-24	25-34	35-44	45-54	55+	Male	Female
More cycling infrastructure to ensure safety	42%	32%	37%	37%	44%	48%	43%	42%
More education as to the benefits of e-bikes for all types of people	17%	21%	12%	16%	16%	18%	17%	16%
Awareness as to how it might improve their personal health and fitness	30%	30%	25%	25%	26%	34%	28%	31%
An e-bike subsidy	60%	46%	56%	56%	62%	65%	58%	61%
More safe storage in their home/ workplace	34%	28%	33%	31%	37%	37%	35%	34%
The cost of living (e.g. higher car fuel prices)	55%	50%	61%	54%	53%	54%	49%	59%
Looking to commute or travel by bike to avoid COVID-19	17%	17%	21%	19%	18%	15%	18%	16%
Knowing that it would lessen their environmental impact	35%	35%	37%	31%	34%	36%	33%	37%
None of these	5%	1%	4%	8%	6%	6%	6%	4%
Don't know	5%	7%	5%	6%	5%	4%	5%	5%

3. In general, who do you think e-bikes are for? (Please select all that apply)

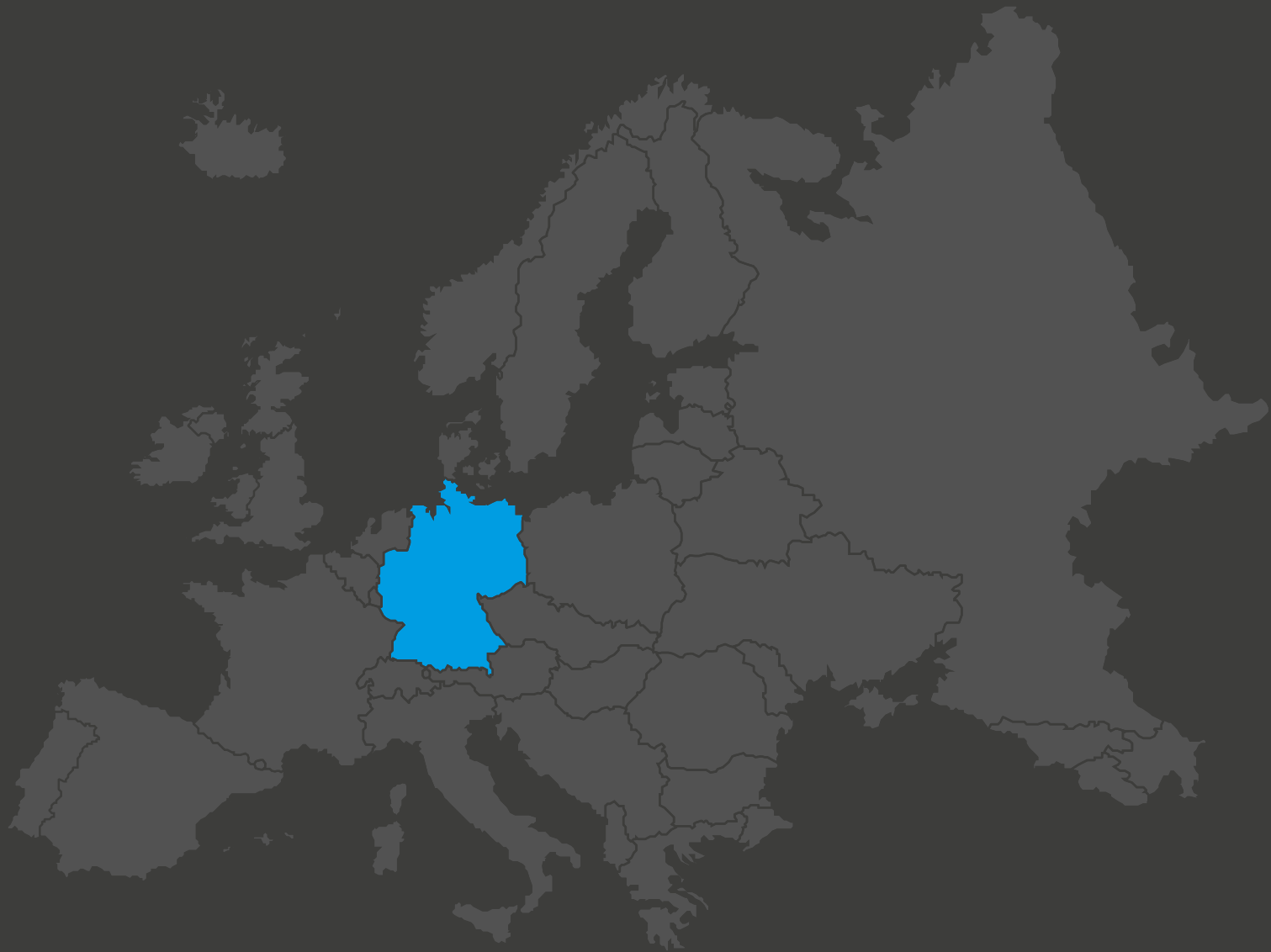
RESPONSE	TOTAL	Age					Gender	
		18-24	25-34	35-44	45-54	55+	Male	Female
Commuters	56%	59%	58%	57%	51%	56%	53%	59%
Parents	27%	30%	31%	27%	25%	26%	28%	26%
Elderly people	32%	23%	32%	32%	26%	37%	35%	30%
Environmentally-conscious people	59%	54%	54%	56%	57%	63%	55%	62%
Budget-conscious people	34%	41%	34%	33%	30%	34%	33%	34%
Other	10%	4%	11%	11%	13%	10%	10%	10%
Don't know	9%	8%	6%	10%	12%	9%	9%	9%

4. For the following question, if you do not own a bike, please select the “Not applicable” option. Thinking about the next six months (i.e. before February 2023)... How likely, if at all, are you to visit a bike shop to get your bike serviced?

RESPONSE	TOTAL	Age					Gender	
		18-24	25-34	35-44	45-54	55+	Male	Female
Very likely	8%	8%	12%	9%	7%	7%	10%	6%
Fairly likely	16%	20%	15%	19%	16%	15%	18%	14%
Not very likely	11%	19%	12%	11%	12%	10%	13%	10%
Not at all likely	11%	12%	11%	11%	13%	9%	11%	10%
Don't know	3%	2%	2%	5%	3%	3%	3%	3%
Not applicable - I do not own a bike	51%	39%	48%	45%	49%	57%	43%	57%
Net: Likely	24%	28%	27%	28%	23%	22%	29%	20%
Net: Not likely	22%	31%	23%	22%	25%	18%	25%	20%

5. You previously told us that you are likely to get your bike serviced in the next six months... Which, if any, of the following are reasons for this? (Please select all that apply)

RESPONSE	TOTAL	Age					Gender	
		18-24 (n=37)	25-34	35-44	45-54	55+	Male	Female
To check whether it is in working order (i.e. in case something has gone wrong)	36%	34%	33%	39%	25%	42%	37%	36%
Servicing is part of my regular bike routine	28%	29%	25%	24%	28%	31%	31%	23%
Servicing is important for safe riding/ commuting	32%	17%	35%	37%	32%	33%	32%	31%
Servicing is important to make my bike live/ last/ work longer	44%	33%	40%	44%	38%	52%	45%	43%
Only if my bike breaks down	16%	21%	15%	11%	21%	14%	13%	19%
Other	1%	-	-	-	1%	2%	2%	-
Don't know	1%	-	1%	-	1%	1%	1%	1%



Germany

1. For the following question, by “cycling infrastructure”, we mean transportation systems and services that are designed to be safe and usable for bicycles. To what extent do you agree or disagree with the following statement? “The cycling infrastructure has improved in my local area in the last 12 months”.

RESPONSE	TOTAL	Age					Gender	
		18-24	25-34	35-44	45-54	55+	Male	Female
Strongly agree	7%	4%	12%	9%	8%	5%	8%	6%
Tend to agree	25%	28%	30%	26%	22%	23%	29%	21%
Tend to disagree	28%	34%	25%	28%	23%	29%	27%	28%
Strongly disagree	21%	13%	13%	19%	25%	25%	21%	22%
Don't know	19%	21%	19%	18%	22%	19%	16%	23%
Net: Agree	32%	33%	42%	36%	29%	28%	37%	27%
Net: Disagree	49%	46%	39%	47%	49%	54%	48%	50%

2. Which, if any, of the following do you think might encourage somebody to buy or hire an e-bike more now, compared to 12 months ago? (Please select all that apply)

RESPONSE	TOTAL	Age					Gender	
		18-24	25-34	35-44	45-54	55+	Male	Female
More cycling infrastructure to ensure safety	21%	18%	24%	21%	22%	20%	21%	21%
More education as to the benefits of e-bikes for all types of people	10%	14%	15%	7%	9%	9%	11%	9%
Awareness as to how it might improve their personal health and fitness	26%	27%	27%	27%	28%	25%	24%	29%
An e-bike subsidy	25%	21%	27%	23%	31%	23%	23%	26%
More safe storage in their home/ workplace	20%	26%	23%	21%	19%	18%	21%	20%
The cost of living (e.g. higher car fuel prices)	31%	27%	30%	31%	34%	31%	28%	34%
Looking to commute or travel by bike to avoid COVID-19	17%	22%	16%	17%	17%	16%	15%	18%
Knowing that it would lessen their environmental impact	27%	28%	24%	26%	27%	28%	24%	30%
None of these	27%	17%	16%	21%	33%	33%	28%	26%
Don't know	11%	10%	12%	12%	9%	12%	10%	13%

3. In general, who do you think e-bikes are for? (Please select all that apply)

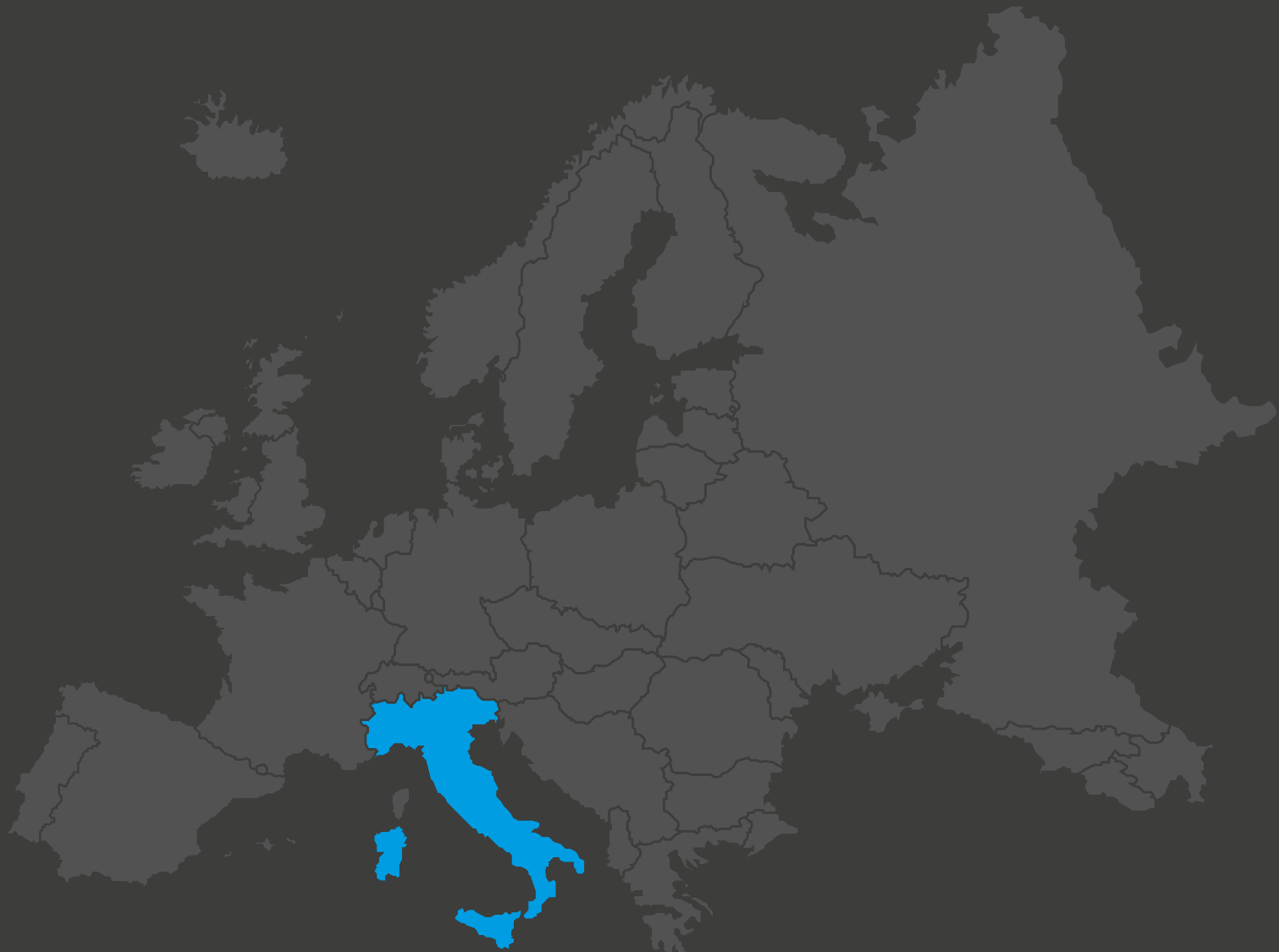
RESPONSE	TOTAL	Age					Gender	
		18-24	25-34	35-44	45-54	55+	Male	Female
Commuters	39%	31%	39%	41%	41%	40%	37%	40%
Parents	20%	19%	25%	25%	19%	17%	17%	23%
Elderly people	48%	43%	44%	48%	50%	50%	48%	48%
Environmentally-conscious people	43%	36%	35%	41%	40%	48%	41%	45%
Budget-conscious people	22%	26%	23%	24%	19%	22%	22%	23%
Other	5%	3%	3%	4%	5%	5%	4%	5%
Don't know	20%	18%	17%	18%	23%	20%	18%	22%

4. For the following question, if you do not own a bike, please select the “Not applicable” option. Thinking about the next six months (i.e. before February 2023)... How likely, if at all, are you to visit a bike shop to get your bike serviced?

RESPONSE	TOTAL	Age					Gender	
		18-24	25-34	35-44	45-54	55+	Male	Female
Very likely	10%	13%	9%	14%	9%	8%	11%	9%
Fairly likely	14%	20%	21%	18%	13%	9%	17%	11%
Not very likely	14%	16%	18%	15%	14%	11%	14%	14%
Not at all likely	14%	11%	11%	13%	15%	16%	15%	14%
Don't know	6%	10%	9%	7%	6%	4%	6%	6%
Not applicable - I do not own a bike	42%	30%	31%	34%	42%	52%	37%	47%
Net: Likely	24%	34%	30%	31%	22%	17%	28%	19%
Net: Not likely	28%	27%	30%	28%	29%	28%	29%	28%

5. You previously told us that you are likely to get your bike serviced in the next six months... Which, if any, of the following are reasons for this? (Please select all that apply)

RESPONSE	TOTAL	Age					Gender	
		18-24	25-34	35-44	45-54	55+	Male	Female
To check whether it is in working order (i.e. in case something has gone wrong)	39%	32%	43%	40%	42%	37%	39%	40%
Servicing is part of my regular bike routine	31%	19%	25%	33%	39%	35%	33%	29%
Servicing is important for safe riding/ commuting	43%	26%	35%	39%	48%	55%	42%	44%
Servicing is important to make my bike live/ last/ work longer	50%	38%	36%	36%	63%	64%	46%	55%
Only if my bike breaks down	9%	9%	14%	12%	8%	5%	9%	9%
Other	2%	3%	2%	2%	-	2%	1%	2%
Don't know	1%	-	-	2%	1%	1%	1%	0%



Italy

1. For the following question, by “cycling infrastructure”, we mean transportation systems and services that are designed to be safe and usable for bicycles. To what extent do you agree or disagree with the following statement? “The cycling infrastructure has improved in my local area in the last 12 months”.

RESPONSE	TOTAL	Age					Gender	
		18-24	25-34	35-44	45-54	55+	Male	Female
Strongly agree	9%	4%	13%	8%	11%	7%	9%	9%
Tend to agree	31%	27%	25%	35%	27%	33%	33%	28%
Tend to disagree	23%	23%	26%	23%	21%	22%	24%	22%
Strongly disagree	29%	32%	25%	28%	32%	30%	25%	33%
Don't know	8%	14%	10%	6%	9%	8%	9%	8%
Net: Agree	39%	31%	38%	43%	38%	40%	42%	37%
Net: Disagree	52%	55%	52%	51%	53%	52%	49%	55%

2. Which, if any, of the following do you think might encourage somebody to buy or hire an e-bike more now, compared to 12 months ago? (Please select all that apply)

RESPONSE	TOTAL	Age					Gender	
		18-24	25-34	35-44	45-54	55+	Male	Female
More cycling infrastructure to ensure safety	32%	33%	28%	34%	28%	34%	34%	29%
More education as to the benefits of e-bikes for all types of people	18%	16%	19%	18%	15%	20%	18%	19%
Awareness as to how it might improve their personal health and fitness	35%	20%	34%	36%	33%	39%	32%	38%
An e-bike subsidy	47%	37%	48%	49%	44%	49%	49%	45%
More safe storage in their home/ workplace	26%	28%	27%	26%	26%	25%	26%	26%
The cost of living (e.g. higher car fuel prices)	55%	39%	54%	55%	58%	58%	51%	59%
Looking to commute or travel by bike to avoid COVID-19	19%	24%	18%	19%	21%	17%	17%	20%
Knowing that it would lessen their environmental impact	51%	55%	51%	48%	47%	54%	47%	55%
None of these	2%	2%	1%	2%	4%	2%	2%	2%
Don't know	4%	6%	3%	2%	4%	4%	3%	4%

3. In general, who do you think e-bikes are for? (Please select all that apply)

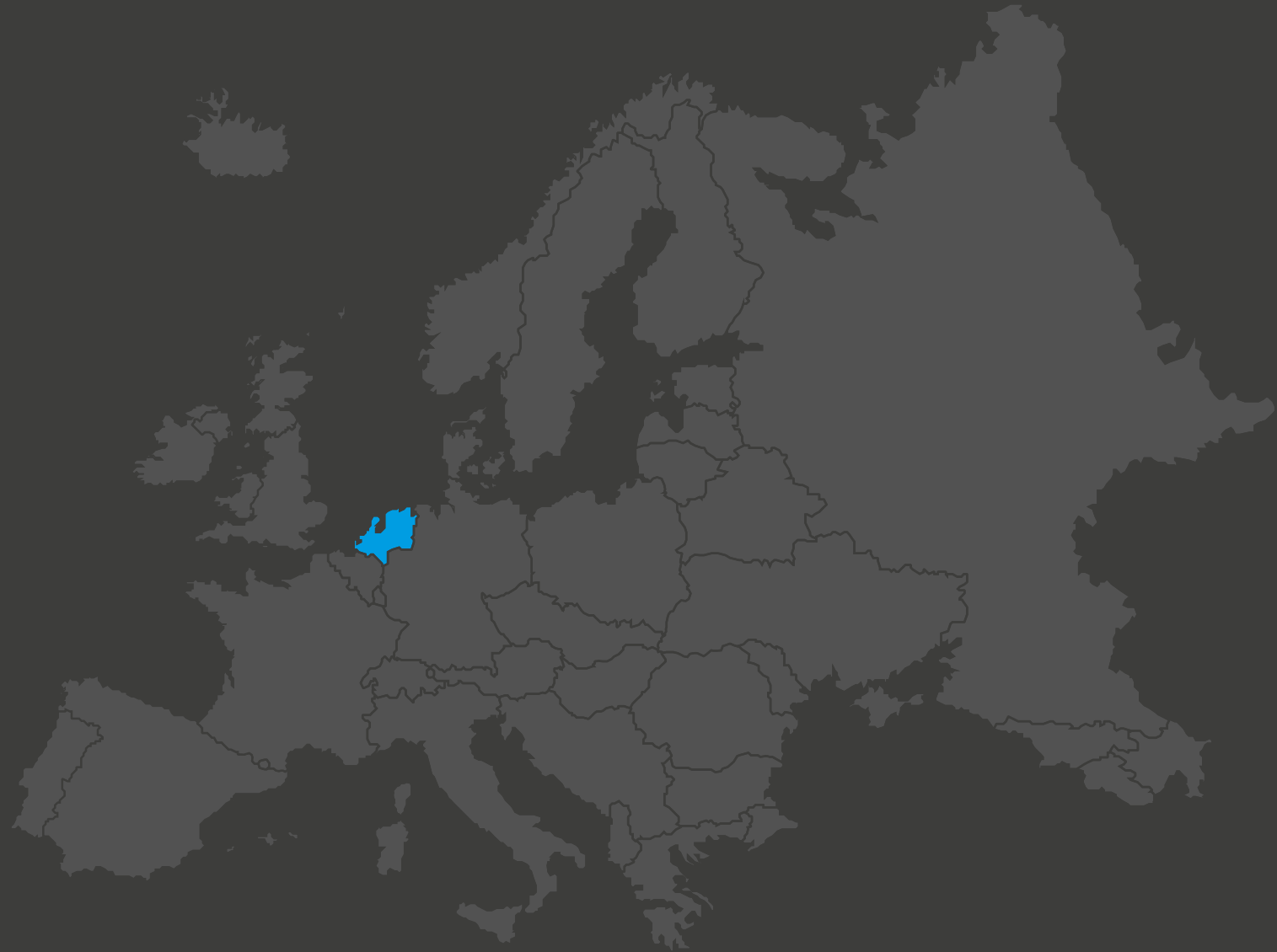
RESPONSE	TOTAL	Age					Gender	
		18-24	25-34	35-44	45-54	55+	Male	Female
Commuters	40%	49%	46%	39%	42%	36%	39%	41%
Parents	14%	12%	18%	17%	19%	11%	18%	12%
Elderly people	29%	27%	25%	27%	28%	31%	33%	25%
Environmentally conscious people	65%	65%	60%	59%	69%	67%	60%	69%
Budget-conscious people	30%	31%	31%	24%	33%	31%	29%	31%
Other	10%	2%	10%	12%	9%	10%	8%	11%
Don't know	8%	10%	10%	7%	7%	8%	9%	6%

4. For the following question, if you do not own a bike, please select the “Not applicable” option. Thinking about the next six months (i.e. before February 2023)... How likely, if at all, are you to visit a bike shop to get your bike serviced?

RESPONSE	TOTAL	Age					Gender	
		18-24	25-34	35-44	45-54	55+	Male	Female
Very likely	9%	8%	11%	10%	12%	7%	11%	7%
Fairly likely	20%	18%	21%	26%	19%	19%	22%	19%
Not very likely	15%	19%	16%	15%	16%	14%	17%	13%
Not at all likely	11%	20%	10%	13%	11%	10%	11%	11%
Don't know	5%	6%	8%	3%	8%	4%	5%	6%
Not applicable - I do not own a bike	39%	29%	35%	33%	35%	45%	34%	43%
Net: Likely	29%	26%	32%	36%	30%	27%	33%	26%
Net: Not likely	27%	39%	26%	28%	27%	24%	29%	25%

5. You previously told us that you are likely to get your bike serviced in the next six months... Which, if any, of the following are reasons for this? (Please select all that apply)

RESPONSE	TOTAL	Age					Gender	
		18-24 (n=13)	25-34 (n=47)	35-44	45-54	55+	Male	Female
To check whether it is in working order (i.e. in case something has gone wrong)	40%	15%	47%	41%	47%	38%	42%	37%
Servicing is part of my regular bike routine	28%	23%	28%	27%	31%	29%	29%	27%
Servicing is important for safe riding/ commuting	44%	30%	51%	47%	45%	42%	43%	44%
Servicing is important to make my bike live/ last/ work longer	59%	70%	51%	54%	53%	66%	61%	57%
Only if my bike breaks down	7%	15%	8%	8%	3%	7%	6%	9%
Other	1%	-	-	2%	-	1%	1%	1%
Don't know	0%	-	2%	-	-	-	-	1%



Netherlands

1. For the following question, by “cycling infrastructure”, we mean transportation systems and services that are designed to be safe and usable for bicycles. To what extent do you agree or disagree with the following statement? “The cycling infrastructure has improved in my local area in the last 12 months”.

RESPONSE	TOTAL	Age					Gender	
		18-24	25-34	35-44	45-54	55+	Male	Female
Strongly agree	6%	10%	6%	7%	7%	5%	6%	6%
Tend to agree	31%	41%	29%	37%	25%	30%	34%	28%
Tend to disagree	24%	24%	21%	19%	30%	25%	25%	24%
Strongly disagree	17%	8%	17%	18%	14%	19%	15%	18%
Don't know	21%	16%	27%	19%	24%	21%	19%	24%
Net: Agree	37%	51%	35%	44%	32%	35%	41%	34%
Net: Disagree	41%	33%	39%	38%	44%	44%	40%	42%

2. Which, if any, of the following do you think might encourage somebody to buy or hire an e-bike more now, compared to 12 months ago? (Please select all that apply)

RESPONSE	TOTAL	Age					Gender	
		18-24	25-34	35-44	45-54	55+	Male	Female
More cycling infrastructure to ensure safety	17%	15%	19%	16%	15%	19%	20%	15%
More education around the benefits of e-bikes for all types of people	18%	24%	13%	19%	14%	20%	17%	20%
Awareness as to how it might improve their personal health and fitness	31%	27%	29%	31%	28%	34%	29%	33%
An e-bike subsidy	50%	39%	56%	61%	49%	48%	49%	52%
More safe storage in their home/ workplace	23%	29%	29%	22%	17%	22%	22%	24%
The cost of living (e.g. higher car fuel prices)	53%	44%	55%	55%	52%	54%	50%	56%
Looking to commute or travel by bike to avoid COVID-19	23%	19%	19%	19%	20%	29%	24%	23%
Knowing that it would lessen their environmental impact	24%	30%	29%	25%	21%	21%	24%	24%
None of these	7%	8%	5%	3%	12%	7%	8%	7%
Don't know	6%	4%	5%	6%	5%	7%	5%	6%

3. In general, who do you think e-bikes are for? (Please select all that apply)

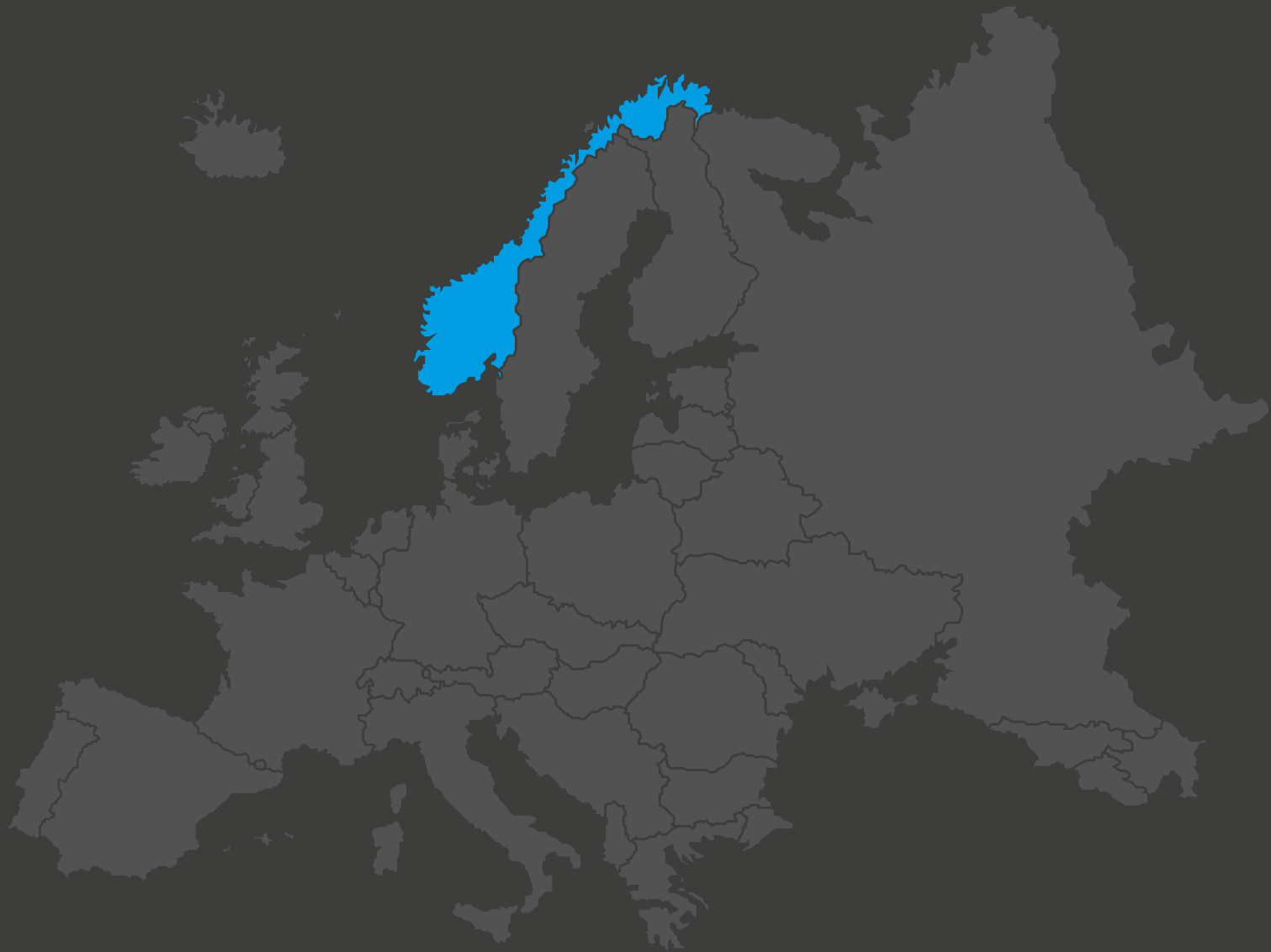
RESPONSE	TOTAL	Age					Gender	
		18-24	25-34	35-44	45-54	55+	Male	Female
Commuters	37%	15%	32%	35%	37%	44%	39%	35%
Parents	24%	31%	28%	28%	24%	20%	24%	25%
Elderly people	65%	67%	70%	61%	60%	66%	65%	65%
Environmentally-conscious people	42%	36%	43%	38%	45%	43%	40%	44%
Budget-conscious people	22%	16%	21%	20%	22%	25%	24%	21%
Other	11%	7%	10%	10%	9%	13%	9%	12%
Don't know	7%	8%	5%	10%	7%	7%	6%	8%

4. For the following question, if you do not own a bike, please select the “Not applicable” option. Thinking about the next six months (i.e. before February 2023)... How likely, if at all, are you to visit a bike shop to get your bike serviced?

RESPONSE	TOTAL	Age					Gender	
		18-24	25-34	35-44	45-54	55+	Male	Female
Very likely	23%	13%	10%	18%	23%	33%	22%	24%
Fairly likely	25%	23%	28%	30%	34%	18%	26%	23%
Not very likely	18%	28%	22%	19%	17%	14%	23%	14%
Not at all likely	17%	22%	21%	17%	13%	17%	14%	20%
Don't know	4%	6%	6%	2%	3%	3%	4%	3%
Not applicable - I do not own a bike	13%	7%	14%	14%	11%	15%	11%	16%
Net: Likely	48%	36%	38%	48%	56%	51%	49%	47%
Net: Not likely	35%	51%	42%	36%	30%	31%	37%	34%

5. You previously told us that you are likely to get your bike serviced in the next six months... Which, if any, of the following are reasons for this? (Please select all that apply)

RESPONSE	TOTAL	Age					Gender	
		18-24 (n=38)	25-34	35-44	45-54	55+	Male	Female
To check whether it is in working order (i.e. in case something has gone wrong)	37%	21%	38%	43%	36%	39%	41%	34%
Servicing is part of my regular bike routine	33%	16%	15%	33%	32%	41%	37%	29%
Servicing is important for safe riding/ commuting	34%	20%	26%	43%	33%	37%	33%	35%
Servicing is important to make my bike live/ last/ work longer	54%	27%	39%	52%	52%	66%	54%	54%
Only if my bike breaks down	14%	29%	28%	11%	17%	6%	12%	16%
Other	3%	3%	-	3%	3%	3%	3%	3%
Don't know	1%	3%	-	-	-	1%	1%	0%



Norway

1. For the following question, by “cycling infrastructure”, we mean transportation systems and services that are designed to be safe and usable for bicycles. To what extent do you agree or disagree with the following statement? “The cycling infrastructure has improved in my local area in the last 12 months”.

RESPONSE	TOTAL	Age					Gender	
		18-24	25-34	35-44	45-54	55+	Male	Female
Strongly agree	7%	9%	5%	6%	10%	6%	8%	5%
Tend to agree	31%	36%	35%	25%	33%	31%	34%	28%
Tend to disagree	22%	21%	26%	24%	16%	22%	22%	22%
Strongly disagree	19%	14%	15%	21%	25%	19%	19%	19%
Don't know	21%	19%	20%	24%	16%	23%	16%	26%
Net: Agree	38%	45%	40%	31%	43%	36%	43%	33%
Net: Disagree	41%	36%	41%	45%	41%	41%	41%	41%

2. Which, if any, of the following do you think might encourage somebody to buy or hire an e-bike more now, compared to 12 months ago? (Please select all that apply)

RESPONSE	TOTAL	Age					Gender	
		18-24	25-34	35-44	45-54	55+	Male	Female
More cycling infrastructure to ensure safety	29%	25%	29%	37%	28%	26%	29%	29%
More education around the benefits of e-bikes for all types of people	16%	16%	15%	11%	15%	19%	16%	16%
Awareness as to how it might improve their personal health and fitness	24%	23%	22%	18%	25%	28%	23%	25%
An e-bike subsidy	34%	22%	35%	39%	41%	31%	37%	31%
More safe storage in their home/ workplace	23%	23%	27%	23%	29%	19%	25%	21%
The cost of living (e.g. higher car fuel prices)	31%	32%	34%	29%	35%	28%	28%	34%
Looking to commute or travel by bike to avoid COVID-19	9%	18%	9%	11%	11%	5%	9%	10%
Knowing that it would lessen their environmental impact	19%	21%	18%	22%	16%	19%	18%	21%
None of these	10%	6%	10%	8%	8%	11%	11%	8%
Don't know	17%	12%	18%	13%	14%	22%	16%	18%

3. In general, who do you think e-bikes are for? (Please select all that apply)

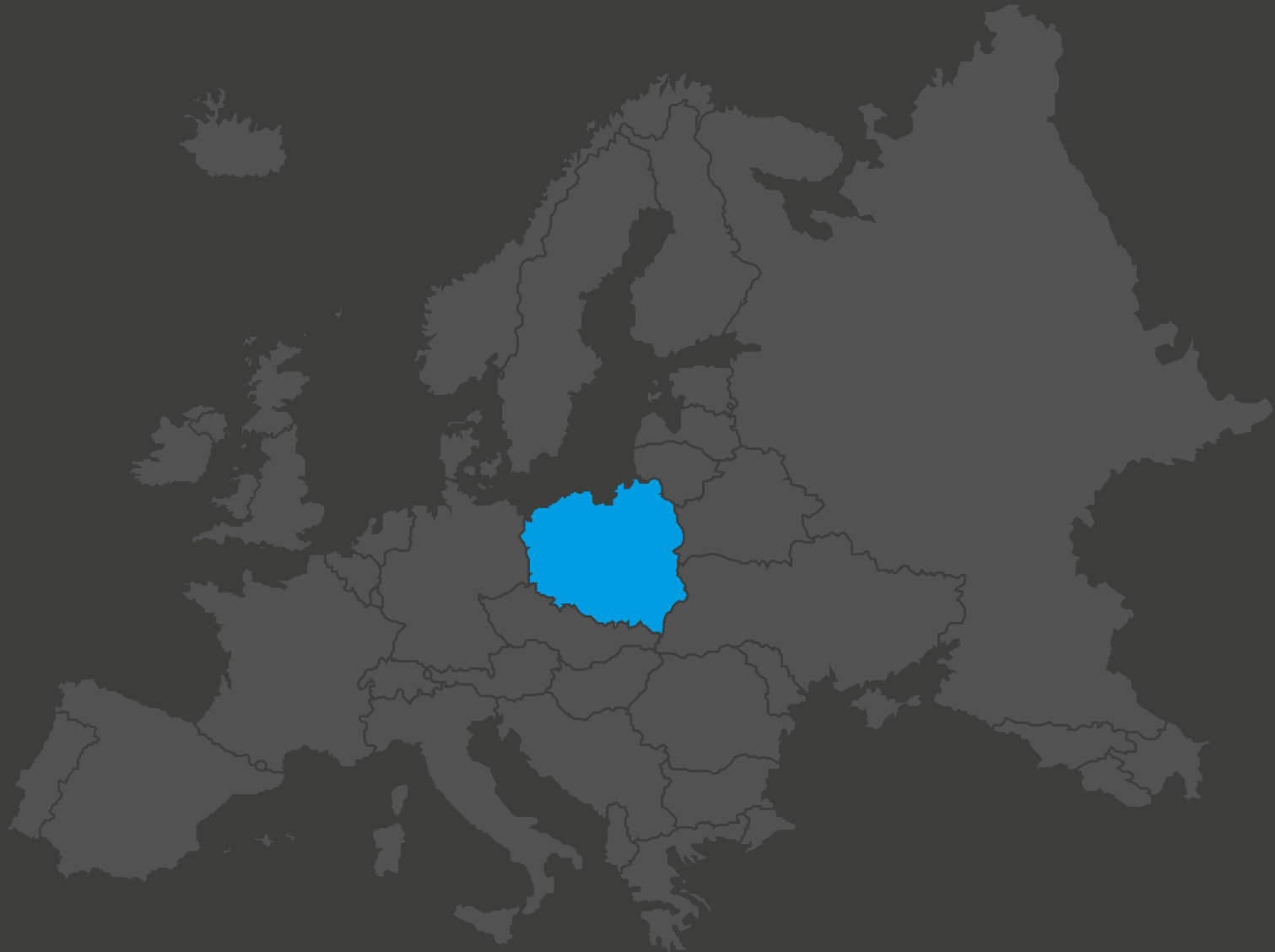
RESPONSE	TOTAL	Age					Gender	
		18-24	25-34	35-44	45-54	55+	Male	Female
Commuters	39%	36%	42%	47%	36%	34%	39%	39%
Parents	25%	30%	28%	33%	20%	21%	25%	25%
Elderly people	33%	23%	29%	34%	33%	37%	34%	32%
Environmentally-conscious people	44%	43%	47%	51%	43%	40%	42%	46%
Budget-conscious people	35%	32%	41%	38%	34%	32%	31%	39%
Other	12%	10%	6%	14%	16%	13%	13%	11%
Don't know	18%	17%	14%	15%	18%	21%	17%	19%

4. For the following question, if you do not own a bike, please select the “Not applicable” option. Thinking about the next six months (i.e. before February 2023)... How likely, if at all, are you to visit a bike shop to get your bike serviced?

RESPONSE	TOTAL	Age					Gender	
		18-24	25-34	35-44	45-54	55+	Male	Female
Very likely	4%	7%	4%	7%	5%	3%	6%	3%
Fairly likely	15%	14%	27%	15%	16%	10%	18%	13%
Not very likely	26%	35%	21%	28%	25%	25%	27%	25%
Not at all likely	24%	18%	15%	23%	29%	28%	24%	23%
Don't know	7%	11%	9%	7%	7%	6%	7%	8%
Not applicable - I do not own a bike	23%	15%	24%	21%	17%	28%	18%	28%
Net: Likely	20%	21%	30%	21%	21%	13%	23%	16%
Net: Not likely	50%	53%	37%	50%	55%	53%	51%	48%

5. You previously told us that you are likely to get your bike serviced in the next six months... Which, if any, of the following are reasons for this? (Please select all that apply)

RESPONSE	TOTAL	Age					Gender	
		18-24	25-34	35-44	45-54	55+	Male	Female
To check whether it is in working order (i.e. in case something has gone wrong)	37%	53%	36%	38%	35%	32%	36%	39%
Servicing is part of my regular bike routine	39%	19%	42%	54%	25%	40%	43%	33%
Servicing is important for safe riding/ commuting	30%	29%	39%	37%	20%	19%	36%	20%
Servicing is important to make my bike live/ last/ work longer	42%	36%	32%	47%	43%	51%	39%	46%
Only if my bike breaks down	8%	12%	8%	5%	7%	10%	9%	7%
Other	3%	-	1%	2%	3%	7%	1%	6%
Don't know	3%	-	3%	2%	8%	3%	2%	5%



Poland

1. For the following question, by “cycling infrastructure”, we mean transportation systems and services that are designed to be safe and usable for bicycles. To what extent do you agree or disagree with the following statement? “The cycling infrastructure has improved in my local area in the last 12 months”.

RESPONSE	TOTAL	Age					Gender	
		18-24	25-34	35-44	45-54	55+	Male	Female
Strongly agree	19%	14%	20%	20%	18%	20%	21%	16%
Tend to agree	37%	36%	42%	38%	37%	35%	36%	39%
Tend to disagree	18%	20%	15%	14%	19%	21%	18%	18%
Strongly disagree	15%	19%	14%	18%	14%	14%	15%	16%
Don't know	11%	12%	9%	10%	12%	11%	10%	12%
Net: Agree	56%	50%	62%	58%	55%	55%	57%	55%
Net: Disagree	33%	39%	29%	32%	32%	35%	33%	34%

2. Which, if any, of the following do you think might encourage somebody to buy or hire an e-bike more now, compared to 12 months ago? (Please select all that apply)

RESPONSE	TOTAL	Age					Gender	
		18-24	25-34	35-44	45-54	55+	Male	Female
More cycling infrastructure to ensure safety	43%	33%	44%	41%	42%	47%	44%	43%
More education around the benefits of e-bikes for all types of people	18%	16%	18%	16%	19%	20%	18%	19%
Awareness as to how it might improve their personal health and fitness	39%	38%	39%	32%	38%	44%	36%	45%
An e-bike subsidy	48%	39%	44%	47%	54%	49%	49%	45%
More safe storage in their home/ workplace	24%	24%	31%	24%	27%	20%	24%	24%
The cost of living (e.g. higher car fuel prices)	45%	48%	53%	42%	38%	44%	44%	47%
Looking to commute or travel by bike to avoid COVID-19	18%	13%	17%	19%	21%	18%	16%	21%
Knowing that it would lessen their environmental impact	34%	27%	32%	30%	35%	37%	31%	39%
None of these	5%	8%	3%	6%	5%	5%	7%	3%
Don't know	5%	5%	3%	5%	7%	6%	5%	6%

3. In general, who do you think e-bikes are for? (Please select all that apply)

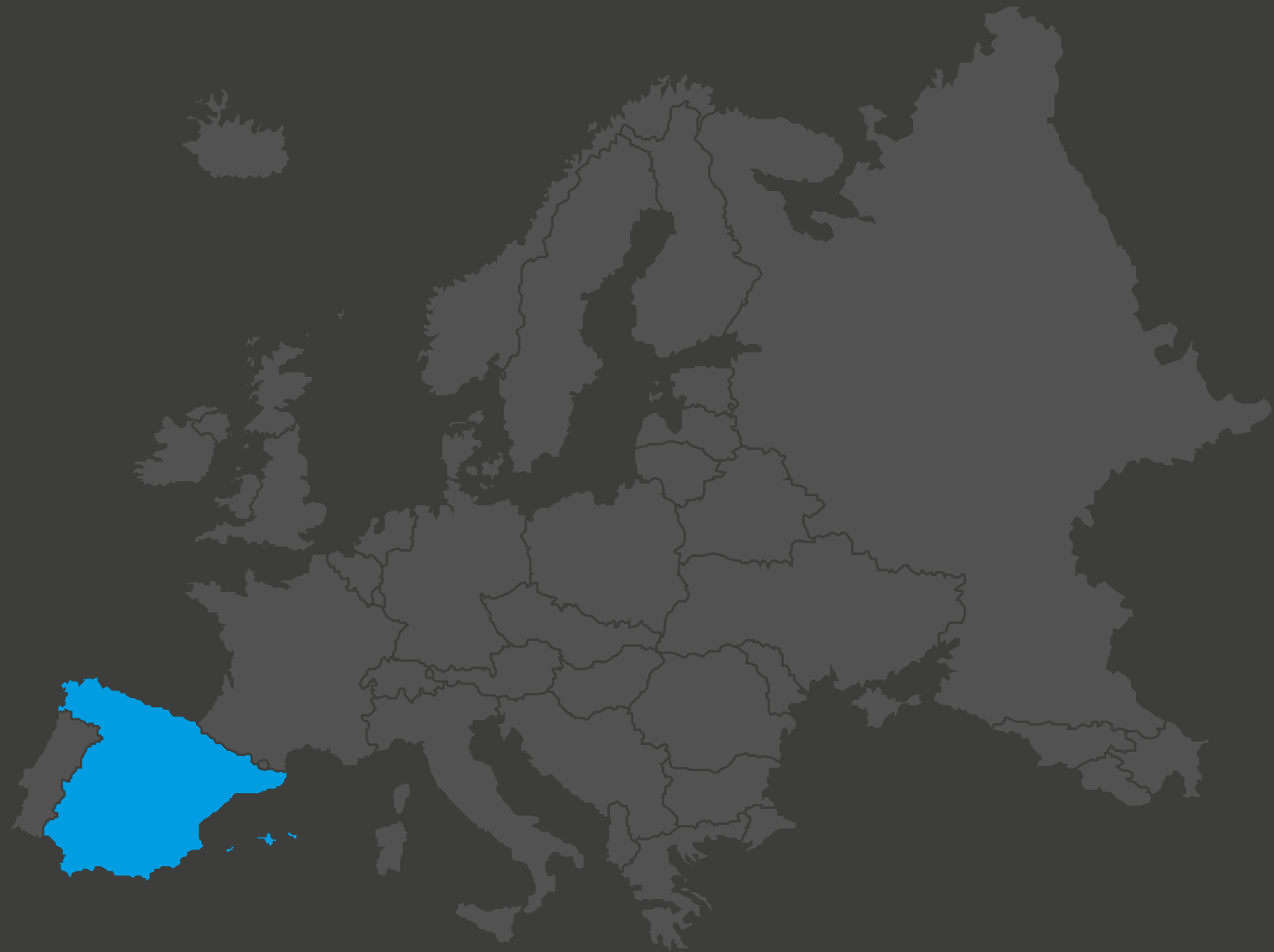
RESPONSE	TOTAL	Age					Gender	
		18-24	25-34	35-44	45-54	55+	Male	Female
Commuters	63%	57%	65%	64%	69%	60%	63%	63%
Parents	26%	31%	37%	28%	26%	17%	25%	27%
Elderly people	43%	35%	42%	38%	42%	48%	44%	41%
Environmentally-conscious people	62%	45%	59%	60%	64%	67%	59%	66%
Budget-conscious people	44%	36%	50%	50%	46%	40%	43%	47%
Other	6%	8%	6%	6%	6%	5%	7%	4%
Don't know	9%	16%	7%	10%	5%	9%	9%	9%

4. For the following question, if you do not own a bike, please select the “Not applicable” option. Thinking about the next six months (i.e. before February 2023)... How likely, if at all, are you to visit a bike shop to get your bike serviced?

RESPONSE	TOTAL	Age					Gender	
		18-24	25-34	35-44	45-54	55+	Male	Female
Very likely	13%	17%	16%	11%	16%	10%	14%	11%
Fairly likely	23%	21%	21%	28%	22%	22%	22%	24%
Not very likely	22%	22%	26%	25%	21%	18%	24%	18%
Not at all likely	11%	10%	11%	11%	11%	11%	11%	11%
Don't know	8%	6%	7%	9%	6%	9%	7%	9%
Not applicable - I do not own a bike	24%	24%	18%	16%	24%	31%	22%	26%
Net: Likely	36%	38%	37%	40%	38%	31%	36%	35%
Net: Not likely	32%	32%	38%	36%	33%	28%	35%	29%

5. You previously told us that you are likely to get your bike serviced in the next six months... Which, if any, of the following are reasons for this? (Please select all that apply)

RESPONSE	TOTAL	Age					Gender	
		18-24 (n=34)	25-34	35-44	45-54	55+	Male	Female
To check whether it is in working order (i.e. in case something has gone wrong)	37%	32%	37%	42%	41%	35%	36%	40%
Servicing is part of my regular bike routine	32%	13%	21%	35%	38%	40%	39%	23%
Servicing is important for safe riding/ commuting	44%	39%	50%	33%	57%	42%	43%	45%
Servicing is important to make my bike live/ last/ work longer	56%	60%	44%	39%	67%	67%	57%	54%
Only if my bike breaks down	11%	5%	11%	15%	7%	12%	12%	9%
Other	0%	-	-	-	1%	-	-	0%
Don't know	0%	2%	-	-	-	-	-	0%



Spain

1. For the following question, by “cycling infrastructure”, we mean transportation systems and services that are designed to be safe and usable for bicycles. To what extent do you agree or disagree with the following statement? “The cycling infrastructure has improved in my local area in the last 12 months”.

RESPONSE	TOTAL	Age					Gender	
		18-24	25-34	35-44	45-54	55+	Male	Female
Strongly agree	14%	15%	14%	14%	14%	13%	13%	14%
Tend to agree	34%	32%	33%	34%	35%	34%	36%	32%
Tend to disagree	17%	22%	20%	20%	13%	16%	18%	16%
Strongly disagree	24%	20%	22%	23%	26%	24%	26%	22%
Don't know	12%	11%	11%	10%	12%	13%	8%	16%
Net: Agree	47%	46%	47%	47%	49%	47%	49%	46%
Net: Disagree	41%	43%	42%	43%	39%	40%	44%	38%

2. Which, if any, of the following do you think might encourage somebody to buy or hire an e-bike more now, compared to 12 months ago? (Please select all that apply)

RESPONSE	TOTAL	Age					Gender	
		18-24	25-34	35-44	45-54	55+	Male	Female
More cycling infrastructure to ensure safety	41%	40%	40%	35%	39%	46%	39%	43%
More education around the benefits of e-bikes for all types of people	29%	34%	24%	26%	23%	33%	28%	29%
Awareness as to how it might improve their personal health and fitness	39%	47%	40%	35%	39%	39%	35%	42%
An e-bike subsidy	48%	46%	48%	45%	50%	48%	47%	48%
More safe storage in their home/ workplace	36%	35%	31%	36%	41%	36%	35%	37%
The cost of living (e.g. higher car fuel prices)	56%	54%	59%	51%	54%	58%	52%	59%
Looking to commute or travel by bike to avoid COVID-19	23%	28%	21%	19%	25%	22%	22%	23%
Knowing that it would lessen their environmental impact	46%	56%	43%	40%	41%	52%	43%	49%
None of these	6%	2%	7%	6%	7%	6%	6%	6%
Don't know	5%	-	4%	5%	8%	5%	5%	5%

3. In general, who do you think e-bikes are for? (Please select all that apply)

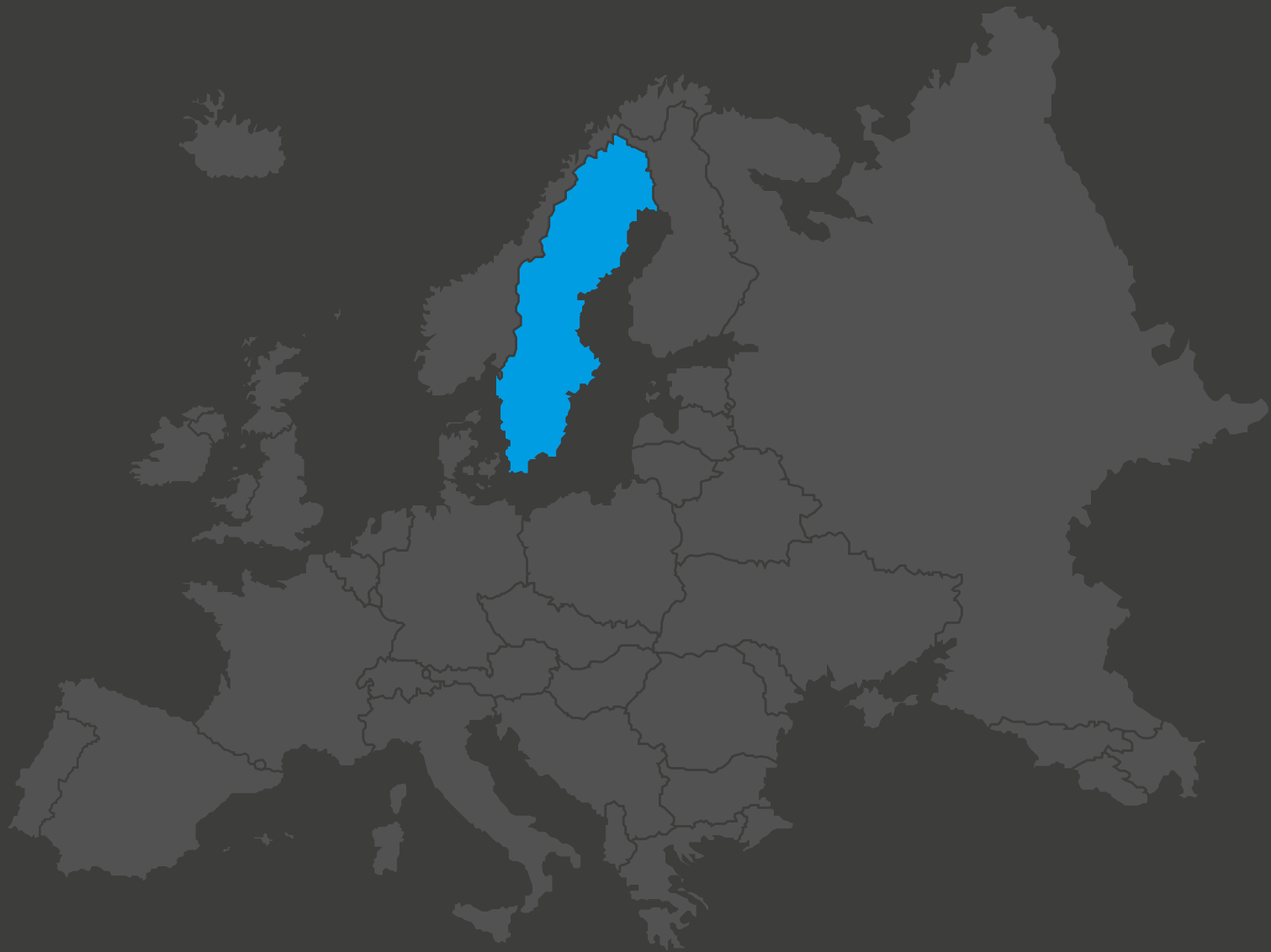
RESPONSE	TOTAL	Age					Gender	
		18-24	25-34	35-44	45-54	55+	Male	Female
Commuters	70%	66%	66%	68%	67%	74%	68%	71%
Parents	18%	20%	19%	15%	22%	17%	19%	17%
Elderly people	22%	22%	21%	18%	18%	25%	24%	19%
Environmentally-conscious people	60%	51%	55%	60%	63%	62%	57%	62%
Budget-conscious people	40%	36%	44%	39%	45%	37%	38%	42%
Other	5%	6%	3%	5%	5%	5%	6%	3%
Don't know	6%	3%	7%	8%	7%	6%	5%	8%

4. For the following question, if you do not own a bike, please select the “Not applicable” option. Thinking about the next six months (i.e. before February 2023)... How likely, if at all, are you to visit a bike shop to get your bike serviced?

RESPONSE	TOTAL	Age					Gender	
		18-24	25-34	35-44	45-54	55+	Male	Female
Very likely	8%	10%	10%	14%	7%	5%	10%	7%
Fairly likely	17%	18%	15%	19%	19%	15%	19%	14%
Not very likely	16%	35%	19%	15%	14%	12%	19%	13%
Not at all likely	13%	17%	15%	13%	10%	12%	12%	14%
Don't know	2%	1%	3%	2%	3%	2%	2%	3%
Not applicable - I do not own a bike	44%	19%	38%	37%	47%	53%	38%	49%
Net: Likely	25%	28%	25%	33%	25%	20%	29%	21%
Net: Not likely	29%	52%	34%	28%	24%	25%	30%	27%

5. You previously told us that you are likely to get your bike serviced in the next six months... Which, if any, of the following are reasons for this? (Please select all that apply)

RESPONSE	TOTAL	Age					Gender	
		18-24 (n=25)	25-34 (n=40)	35-44	45-54	55+	Male	Female
To check whether it is in working order (i.e. in case something has gone wrong)	46%	52%	45%	42%	44%	50%	45%	48%
Servicing is part of my regular bike routine	33%	32%	28%	34%	41%	30%	35%	30%
Servicing is important for safe riding/ commuting	40%	28%	48%	44%	41%	37%	40%	41%
Servicing is important to make my bike live/ last/ work longer	54%	36%	65%	47%	54%	61%	52%	58%
Only if my bike breaks down	11%	8%	5%	7%	10%	19%	11%	12%
Other	0%	-	-	-	-	1%	-	1%
Don't know	0%	-	-	1%	-	-	1%	-



Sweden

1. For the following question, by “cycling infrastructure”, we mean transportation systems and services that are designed to be safe and usable for bicycles. To what extent do you agree or disagree with the following statement? “The cycling infrastructure has improved in my local area in the last 12 months”.

RESPONSE	TOTAL	Age					Gender	
		18-24	25-34	35-44	45-54	55+	Male	Female
Strongly agree	6%	12%	5%	7%	5%	5%	6%	5%
Tend to agree	24%	32%	30%	19%	22%	23%	24%	24%
Tend to disagree	21%	19%	25%	25%	19%	19%	23%	20%
Strongly disagree	24%	11%	14%	23%	33%	28%	25%	23%
Don't know	25%	27%	27%	25%	22%	25%	22%	28%
Net: Agree	30%	44%	35%	26%	27%	28%	31%	29%
Net: Disagree	45%	30%	39%	48%	52%	47%	47%	43%

2. Which, if any, of the following do you think might encourage somebody to buy or hire an e-bike more now, compared to 12 months ago? (Please select all that apply)

RESPONSE	TOTAL	Age					Gender	
		18-24	25-34	35-44	45-54	55+	Male	Female
More cycling infrastructure to ensure safety	24%	37%	26%	26%	21%	22%	26%	23%
More education around the benefits of e-bikes for all types of people	10%	18%	12%	12%	10%	6%	9%	10%
Awareness as to how it might improve their personal health and fitness	27%	34%	24%	27%	22%	29%	25%	29%
An e-bike subsidy	32%	23%	36%	40%	40%	26%	31%	33%
More safe storage in their home/ workplace	27%	21%	29%	30%	32%	25%	26%	29%
The cost of living (e.g. higher car fuel prices)	45%	42%	47%	48%	43%	44%	39%	50%
Looking to commute or travel by bike to avoid COVID-19	15%	18%	16%	14%	19%	14%	11%	20%
Knowing that it would lessen their environmental impact	25%	29%	23%	25%	27%	24%	20%	30%
None of these	12%	3%	8%	10%	16%	14%	14%	10%
Don't know	11%	5%	11%	9%	8%	14%	10%	11%

3. In general, who do you think e-bikes are for? (Please select all that apply)

RESPONSE	TOTAL	Age					Gender	
		18-24	25-34	35-44	45-54	55+	Male	Female
Commuters	44%	57%	42%	55%	45%	39%	44%	45%
Parents	21%	32%	22%	29%	21%	15%	18%	24%
Elderly people	31%	27%	31%	30%	31%	32%	32%	29%
Environmentally-conscious people	47%	51%	48%	44%	47%	47%	39%	55%
Budget-conscious people	29%	30%	37%	29%	28%	25%	24%	35%
Other	13%	2%	5%	11%	15%	19%	14%	12%
Don't know	15%	11%	11%	18%	17%	16%	16%	14%

4. For the following question, if you do not own a bike, please select the “Not applicable” option. Thinking about the next six months (i.e. before February 2023)... How likely, if at all, are you to visit a bike shop to get your bike serviced?

RESPONSE	TOTAL	Age					Gender	
		18-24	25-34	35-44	45-54	55+	Male	Female
Very likely	8%	10%	11%	6%	8%	6%	9%	6%
Fairly likely	14%	22%	20%	17%	12%	10%	14%	14%
Not very likely	16%	23%	18%	14%	16%	13%	16%	15%
Not at all likely	20%	18%	14%	18%	25%	23%	23%	18%
Don't know	5%	6%	10%	8%	2%	2%	4%	6%
Not applicable - I do not own a bike	37%	21%	28%	37%	36%	46%	33%	41%
Net: Likely	22%	31%	31%	23%	19%	16%	24%	20%
Net: Not likely	36%	41%	31%	32%	42%	36%	39%	33%

5. You previously told us that you are likely to get your bike serviced in the next six months... Which, if any, of the following are reasons for this? (Please select all that apply)

RESPONSE	TOTAL	Age					Gender	
		18-24 (n=20)	25-34	35-44 (n=32)	45-54 (n=36)	55+	Male	Female
To check whether it is in working order (i.e. in case something has gone wrong)	27%	27%	36%	41%	13%	18%	30%	23%
Servicing is part of my regular bike routine	22%	30%	28%	20%	13%	20%	31%	13%
Servicing is important for safe riding/ commuting	28%	32%	30%	41%	21%	21%	33%	22%
Servicing is important to make my bike live/ last/ work longer	41%	44%	36%	45%	44%	41%	42%	39%
Only if my bike breaks down	21%	8%	18%	22%	24%	29%	14%	30%
Other	4%	-	2%	-	9%	9%	6%	3%
Don't know	1%	-	5%	-	-	-	3%	-



Switzerland

1. For the following question, by “cycling infrastructure”, we mean transportation systems and services that are designed to be safe and usable for bicycles. To what extent do you agree or disagree with the following statement? “The cycling infrastructure has improved in my local area in the last 12 months”.

RESPONSE	TOTAL	Age					Gender	
		18-24	25-34	35-44	45-54	55+	Male	Female
Strongly agree	11%	10%	14%	15%	6%	11%	13%	10%
Tend to agree	32%	39%	29%	28%	32%	34%	36%	29%
Tend to disagree	28%	21%	27%	25%	32%	29%	29%	28%
Strongly disagree	16%	19%	15%	18%	16%	15%	13%	19%
Don't know	12%	11%	15%	14%	14%	10%	10%	15%
Net: Agree	44%	49%	43%	43%	38%	46%	49%	39%
Net: Disagree	44%	40%	42%	43%	48%	44%	42%	46%

2. Which, if any, of the following do you think might encourage somebody to buy or hire an e-bike more now, compared to 12 months ago? (Please select all that apply)

RESPONSE	TOTAL	Age					Gender	
		18-24	25-34	35-44	45-54	55+	Male	Female
More cycling infrastructure to ensure safety	27%	23%	28%	26%	24%	29%	25%	28%
More education around the benefits of e-bikes for all types of people	15%	15%	20%	13%	12%	16%	16%	15%
Awareness as to how it might improve their personal health and fitness	39%	44%	37%	38%	36%	40%	37%	40%
An e-bike subsidy	30%	20%	27%	35%	33%	29%	31%	28%
More safe storage in their home/ workplace	24%	26%	22%	20%	26%	27%	24%	24%
The cost of living (e.g. higher car fuel prices)	45%	43%	49%	49%	43%	44%	42%	48%
Looking to commute or travel by bike to avoid COVID-19	20%	18%	18%	22%	20%	19%	17%	22%
Knowing that it would lessen their environmental impact	39%	44%	35%	40%	36%	42%	36%	43%
None of these	9%	8%	8%	6%	9%	13%	11%	8%
Don't know	7%	7%	5%	9%	11%	6%	5%	9%

3. In general, who do you think e-bikes are for? (Please select all that apply)

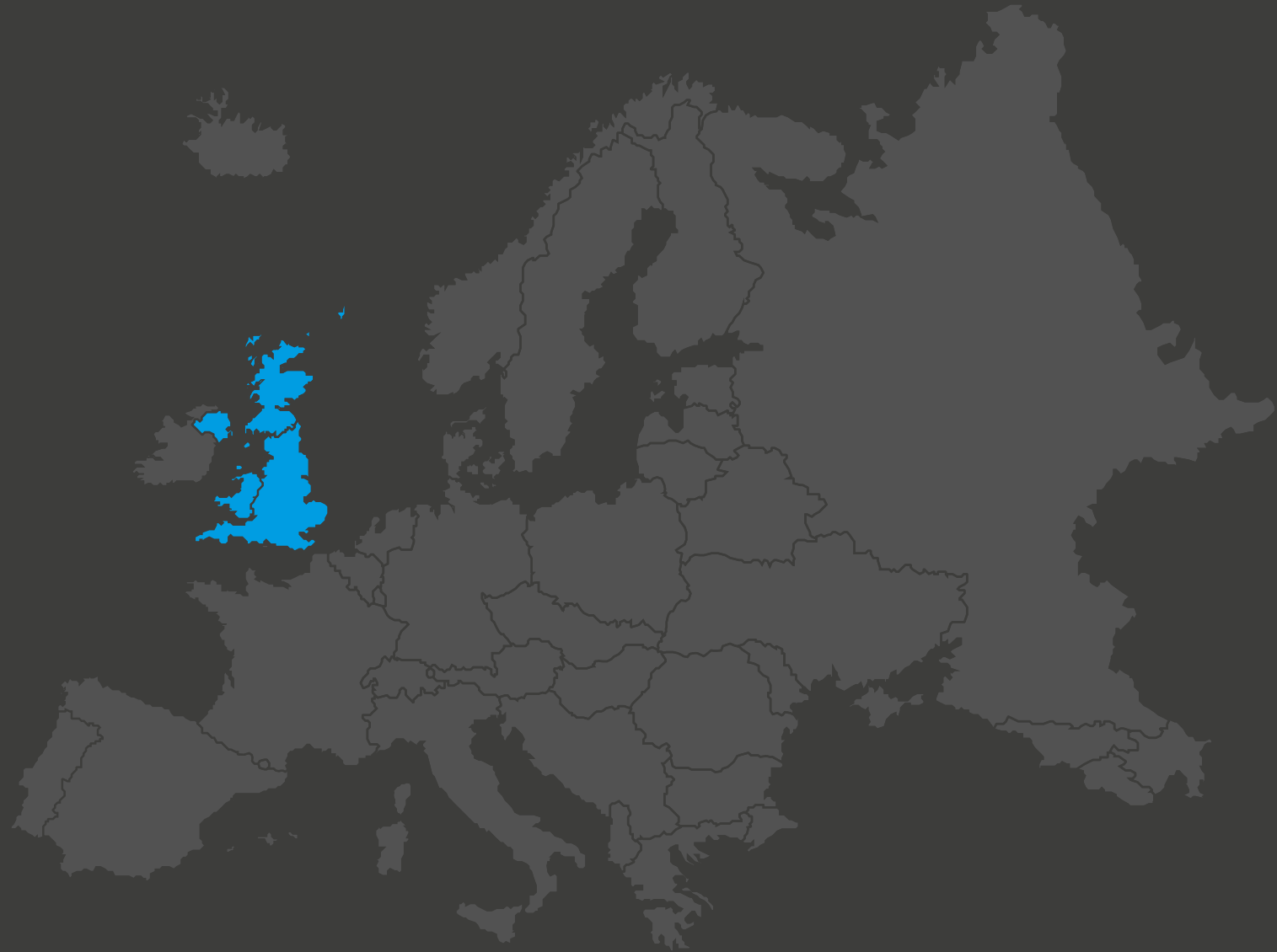
RESPONSE	TOTAL	Age					Gender	
		18-24	25-34	35-44	45-54	55+	Male	Female
Commuters	57%	49%	58%	54%	63%	56%	57%	57%
Parents	27%	29%	39%	36%	26%	18%	26%	28%
Elderly people	39%	43%	42%	37%	42%	37%	43%	36%
Environmentally-conscious people	58%	52%	56%	57%	51%	63%	51%	64%
Budget-conscious people	26%	37%	30%	24%	24%	23%	25%	27%
Other	9%	4%	7%	14%	6%	11%	9%	10%
Don't know	8%	8%	7%	9%	11%	8%	7%	9%

4. For the following question, if you do not own a bike, please select the “Not applicable” option. Thinking about the next six months (i.e. before February 2023)... How likely, if at all, are you to visit a bike shop to get your bike serviced?

RESPONSE	TOTAL	Age					Gender	
		18-24	25-34	35-44	45-54	55+	Male	Female
Very likely	10%	9%	10%	15%	9%	10%	12%	9%
Fairly likely	18%	16%	23%	19%	21%	16%	21%	16%
Not very likely	16%	30%	18%	16%	15%	12%	17%	15%
Not at all likely	10%	13%	15%	10%	11%	6%	11%	9%
Don't know	4%	3%	3%	3%	6%	4%	4%	4%
Not applicable - I do not own a bike	41%	29%	31%	36%	39%	53%	35%	48%
Net: Likely	29%	25%	33%	34%	30%	25%	33%	25%
Net: Not likely	26%	43%	33%	27%	26%	18%	28%	23%

5. You previously told us that you are likely to get your bike serviced in the next six months... Which, if any, of the following are reasons for this? (Please select all that apply)

RESPONSE	TOTAL	Age					Gender	
		18-24 (n=23)	25-34	35-44	45-54	55+	Male	Female
To check whether it is in working order (i.e. in case something has gone wrong)	36%	17%	31%	43%	42%	36%	35%	37%
Servicing is part of my regular bike routine	30%	30%	22%	30%	26%	36%	32%	26%
Servicing is important for safe riding/ commuting	46%	32%	38%	54%	44%	51%	44%	49%
Servicing is important to make my bike live/ last/ work longer	52%	48%	46%	49%	47%	61%	48%	57%
Only if my bike breaks down	12%	14%	19%	8%	12%	9%	11%	13%
Other	1%	4%	2%	-	-	-	1%	1%
Don't know	1%	4%	2%	2%	-	-	1%	1%



United Kingdom

1. For the following question, by “cycling infrastructure”, we mean transportation systems and services that are designed to be safe and usable for bicycles. To what extent do you agree or disagree with the following statement? “The cycling infrastructure has improved in my local area in the last 12 months”.

RESPONSE	TOTAL	Age					Gender	
		18-24	25-34	35-44	45-54	55+	Male	Female
Strongly agree	5%	9%	4%	5%	6%	5%	5%	6%
Tend to agree	21%	21%	25%	21%	18%	21%	21%	21%
Tend to disagree	27%	26%	28%	27%	29%	25%	27%	26%
Strongly disagree	22%	13%	17%	21%	27%	25%	22%	22%
Don't know	25%	31%	26%	26%	20%	24%	25%	25%
Net: Agree	27%	30%	29%	27%	24%	26%	26%	27%
Net: Disagree	49%	39%	45%	48%	56%	50%	49%	48%

2. Which, if any, of the following do you think might encourage somebody to buy or hire an e-bike more now, compared to 12 months ago? (Please select all that apply)

RESPONSE	TOTAL	Age					Gender	
		18-24	25-34	35-44	45-54	55+	Male	Female
More cycling infrastructure to ensure safety	36%	31%	37%	38%	37%	34%	36%	35%
More education around the benefits of e-bikes for all types of people	16%	20%	14%	12%	16%	18%	15%	17%
Awareness as to how it might improve their personal health and fitness	34%	41%	30%	25%	34%	38%	32%	37%
An e-bike subsidy	40%	33%	46%	38%	47%	37%	41%	39%
More safe storage in their home/ workplace	26%	23%	28%	27%	25%	25%	24%	27%
The cost of living (e.g. higher car fuel prices)	56%	56%	56%	52%	59%	57%	51%	61%
Looking to commute or travel by bike to avoid COVID-19	18%	18%	17%	19%	19%	18%	15%	21%
Knowing that it would lessen their environmental impact	37%	45%	39%	32%	39%	34%	31%	41%
None of these	12%	9%	12%	14%	13%	12%	15%	9%
Don't know	12%	15%	10%	11%	11%	14%	13%	12%

3. In general, who do you think e-bikes are for? (Please select all that apply)

RESPONSE	TOTAL	Age					Gender	
		18-24	25-34	35-44	45-54	55+	Male	Female
Commuters	53%	55%	61%	55%	55%	47%	48%	58%
Parents	16%	20%	17%	14%	17%	15%	12%	20%
Elderly people	24%	17%	21%	20%	27%	27%	23%	25%
Environmentally-conscious people	53%	56%	55%	52%	51%	52%	46%	59%
Budget-conscious people	32%	34%	31%	29%	30%	33%	27%	36%
Other	13%	5%	11%	12%	12%	17%	13%	12%
Don't know	17%	22%	15%	18%	16%	17%	19%	16%

4. For the following question, if you do not own a bike, please select the “Not applicable” option. Thinking about the next six months (i.e. before February 2023)... How likely, if at all, are you to visit a bike shop to get your bike serviced?

RESPONSE	TOTAL	Age					Gender	
		18-24	25-34	35-44	45-54	55+	Male	Female
Very likely	3%	5%	4%	4%	3%	3%	5%	2%
Fairly likely	7%	9%	10%	9%	6%	5%	9%	5%
Not very likely	10%	12%	13%	11%	11%	6%	10%	9%
Not at all likely	15%	17%	11%	17%	18%	13%	17%	13%
Don't know	2%	4%	2%	4%	3%	1%	3%	2%
Not applicable - I do not own a bike	63%	52%	60%	55%	59%	72%	57%	69%
Net: Likely	10%	14%	14%	13%	9%	7%	13%	8%
Net: Not likely	24%	29%	24%	28%	29%	19%	27%	22%

5. You previously told us that you are likely to get your bike serviced in the next six months... Which, if any, of the following are reasons for this? (Please select all that apply)

RESPONSE	TOTAL	Age					Gender	
		18-24 (n=30)	25-34 (n=43)	35-44 (n=43)	45-54 (n=27)	55+	Male	Female
To check whether it is in working order (i.e. in case something has gone wrong)	40%	61%	40%	32%	23%	43%	44%	34%
Servicing is part of my regular bike routine	30%	16%	36%	29%	25%	36%	33%	24%
Servicing is important for safe riding/ commuting	45%	43%	46%	33%	41%	57%	42%	50%
Servicing is important to make my bike live/ last/ work longer	47%	17%	36%	52%	64%	60%	48%	45%
Only if my bike breaks down	12%	6%	14%	16%	11%	10%	10%	15%
Other	1%	-	2%	-	-	2%	1%	1%
Don't know	3%	-	6%	7%	-	-	3%	3%