

SHIMANO



STATE OF THE NATION REPORT

Examining attitudes towards e-bike usage in 12 European countries



Ben Hillsdon

**Head of PR & Communications,
Shimano Europe**

Welcome to the third 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 COVID-19 and the events of 2020/2021 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.

Our first report was conducted together with YouGov in 2019. At the time it was the one of largest e-bike consumer surveys ever conducted. 2020’s report was researched and written right at the very beginning of the global COVID-19 Pandemic, when we were still uncertain about what the ‘new normal’ would look like, or how long the pandemic would last. This year we have looked at 12 European countries, specifically Austria, Denmark, France, Germany, Italy, Netherlands, Norway, Poland, Spain, Sweden, Switzerland, United Kingdom and surveyed over 14,000 people.

Our intention for a year-on-year direct comparison of e-bike use has, of course, not been possible due to the unprecedented impact of the COVID-19 pandemic. However, what it has allowed us to do is chart the behavioural changes COVID-19 has wrought on our societies and on the use of e-bikes. We also asked social commentators and members of the bicycle industry for their views on the findings and their own observations.

Over all the last 12 months have seen some positive, and hopefully, lasting changes. There have been policy changes and practical actions taken to make cycling more attractive, in many countries the temporary infrastructure of ‘covid-lanes’ have proven their value and become a permanent feature. On an individual basis our research shows that Europeans are looking for healthier, safer alternatives to public transport. The pandemic has been a strong ‘push’ factor toward greater bike use.

Whilst the global pandemic undoubtedly has had a significant impact on the bicycle industry and attitudes toward cycling, another global crisis has also thrust e-bikes and urban travel into the limelight; climate change. Environmental issues are bringing e-bikes into the public consciousness. Particularly amongst the younger age groups surveyed, e-bikes and e-cargo bikes are now seen as alternatives to the motor vehicle and as a way of reducing their personal carbon footprint.

We commissioned this YouGov report to better understand the role e-bikes can play in improving the lives and environments of individuals and communities. Within this report you will find well-researched data, informed expert opinion and insightful commentary that will prove useful in understanding current attitudes to e-bike use. It is interesting, indeed essential reading for anyone in the bike industry and those involved in urban travel or planning. We sincerely hope that it will be of benefit to all those who read it and we invite your feedback.

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Gathering the opinions of respondents from 12 countries, this survey of over 14,000 people has helped to reveal the barriers and motivations for e-bike use in the period immediately following the COVID-19 global pandemic.

Providing a rich source of data, it has highlighted trends and given huge insight into the attitudes of users and non-users of e-bikes.

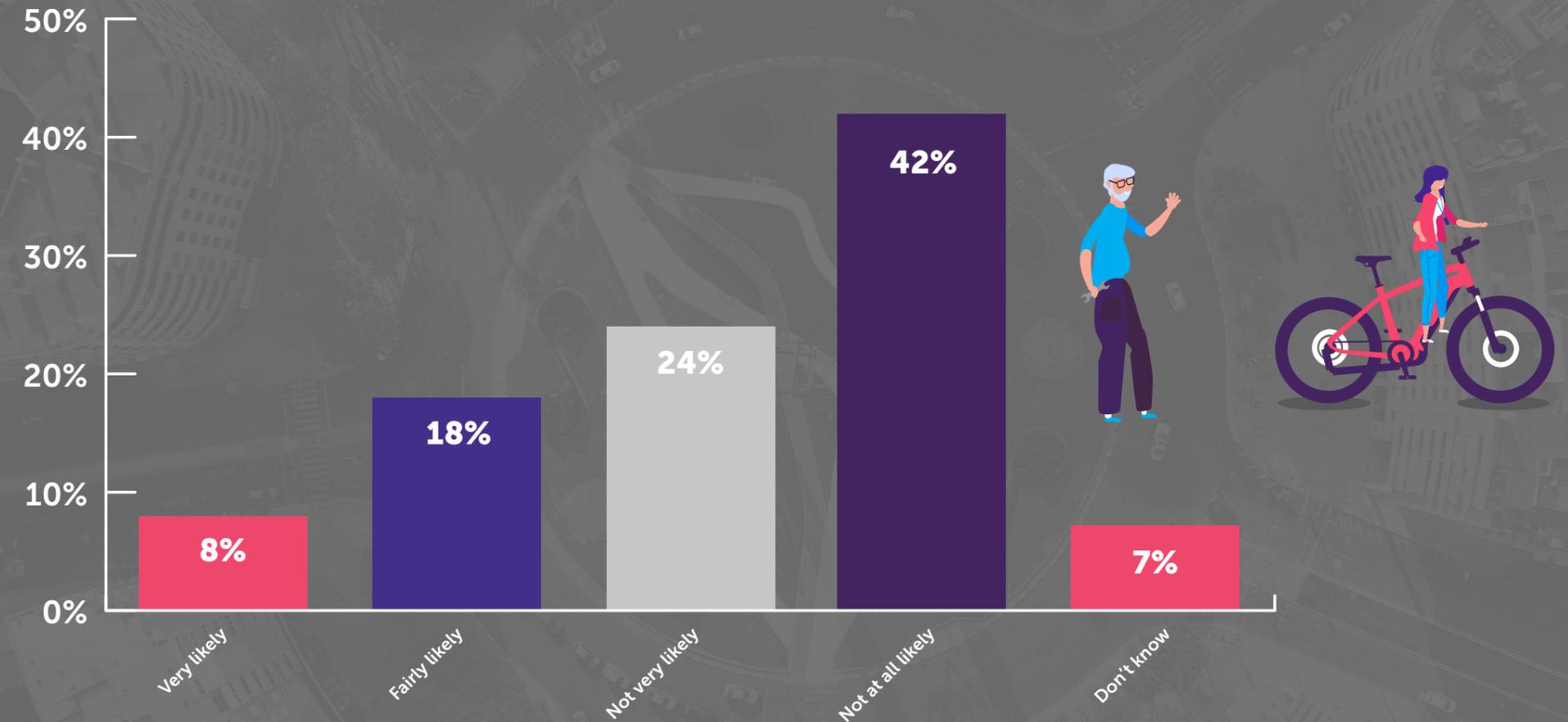
In this section we have combined and summarised the data at a European level.

All figures, unless otherwise stated, are from YouGov Plc. Total sample size was 14,419 adults. Fieldwork was undertaken between 19th - 29th July 2021. The survey was carried out online. Fieldwork was undertaken in Austria, Denmark, France, Germany, Italy, Netherlands, Norway, Poland, Spain, Sweden, Switzerland and the United Kingdom.

This is the third annual Shimano State of The Nation report, which aims to digest changing attitudes and understandings of e-bikes across Europe.

How likely are Europeans to buy or use an e-bike now compared with the previous 12 months?

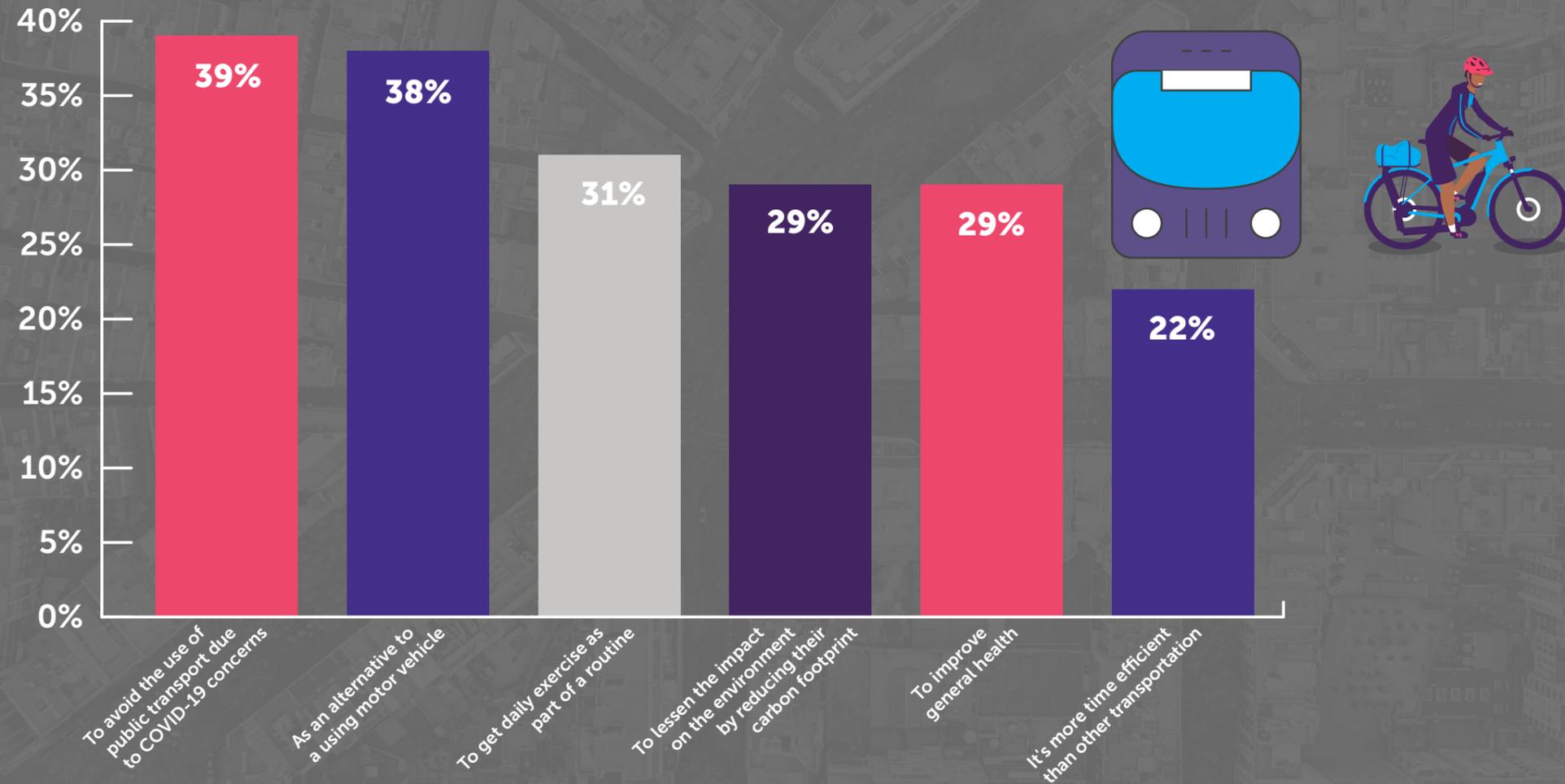
More than one in four Europeans say they are likely or very likely to buy or use an e-bike.



Q1: 'How likely, if at all, would you be to buy/use (i.e. loan/ hire/rent etc.) an e-bike now, compared to before the COVID-19 pandemic (i.e. before February 2020)'

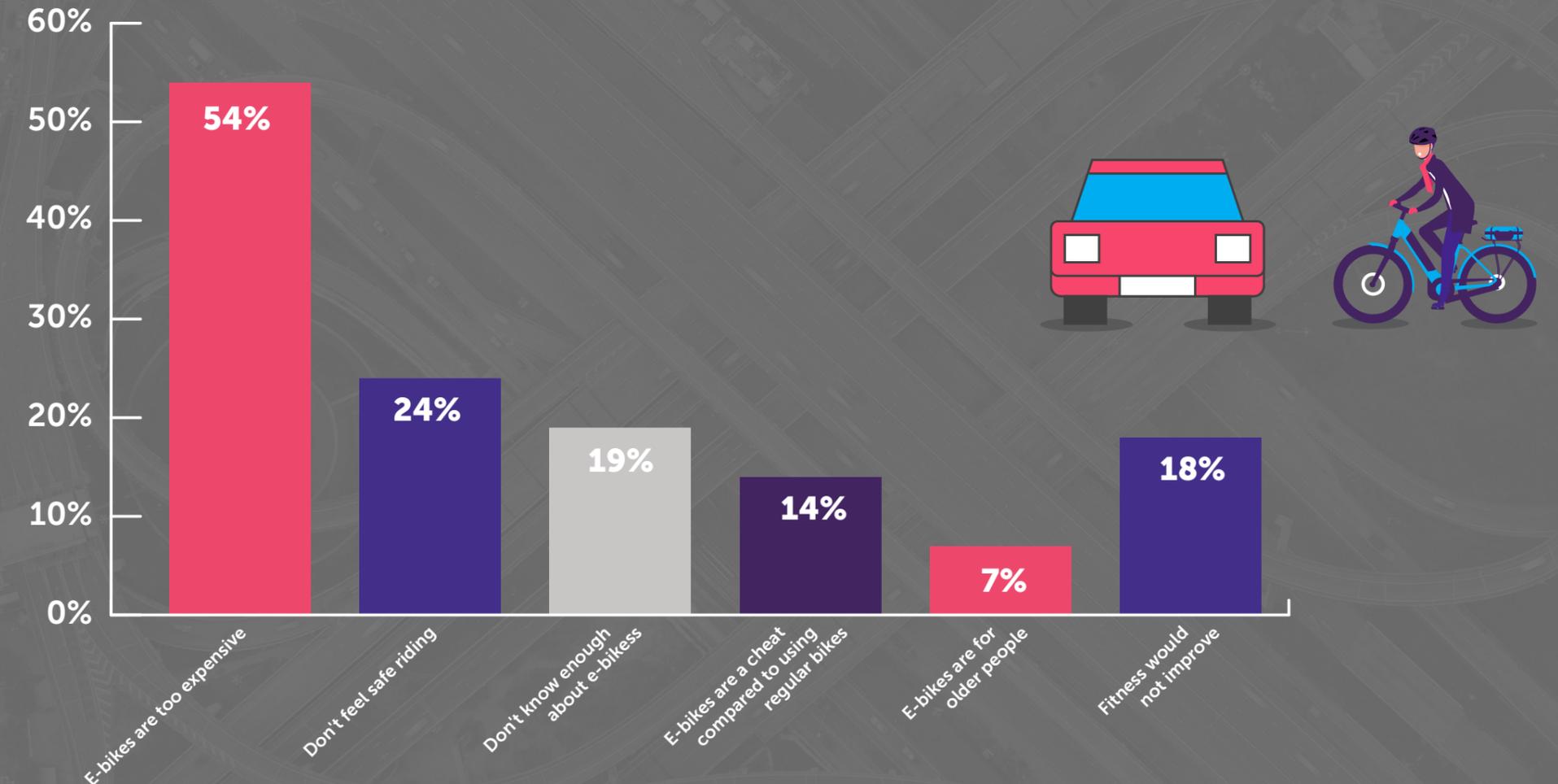
Reasons for buying or using an e-bike compared with before the COVID-19 Pandemic.

More than one in three people want to use an e-bike to avoid public transport, or to avoid motor vehicles.



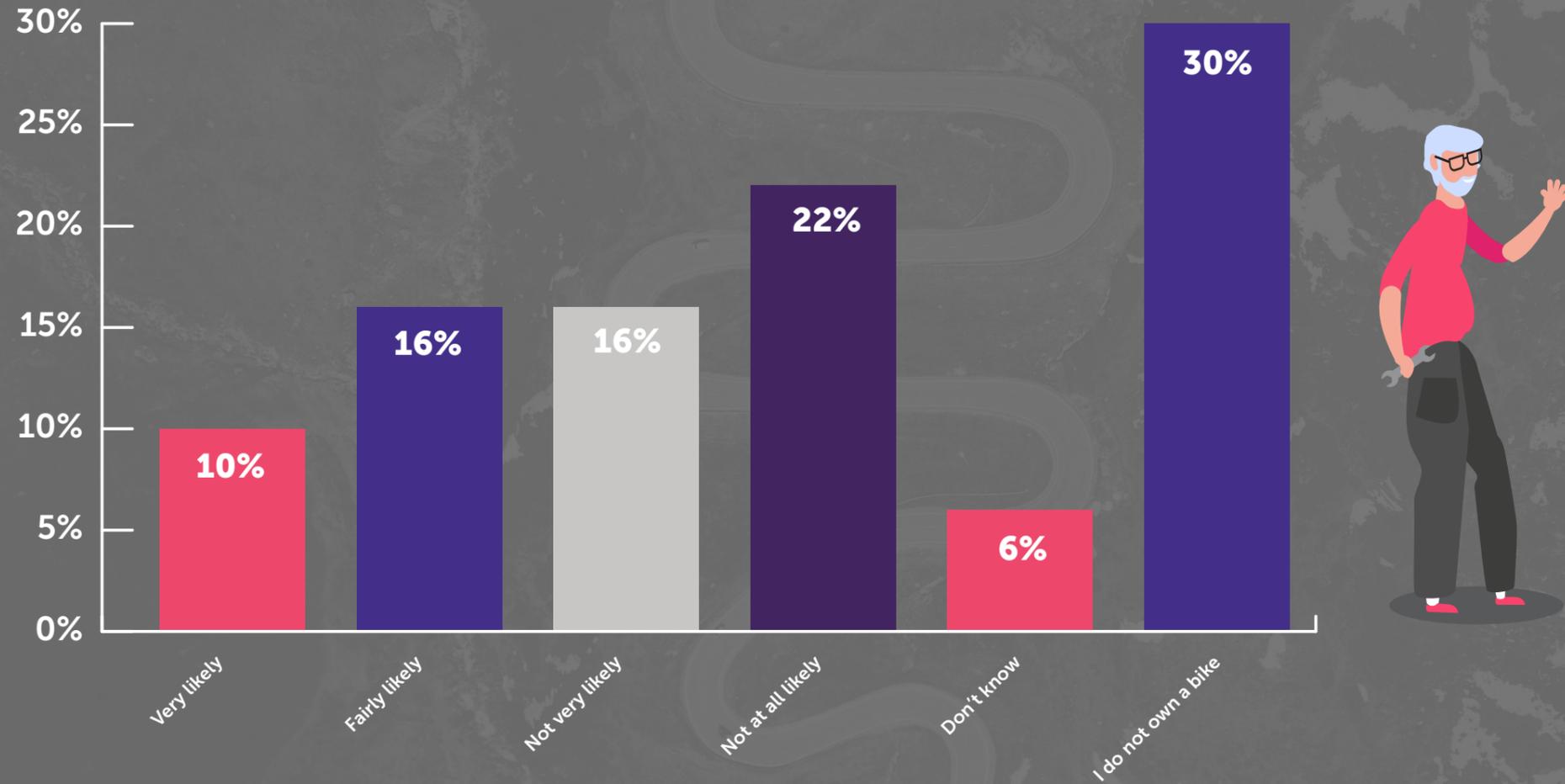
Why might people be less likely to buy or use an e-bike now than compared with before the COVID-19 pandemic?

Not feeling safe riding is a barrier to e-bike use for nearly one in four people.



How likely are Europeans to visit a bike shop in the next 12 months?

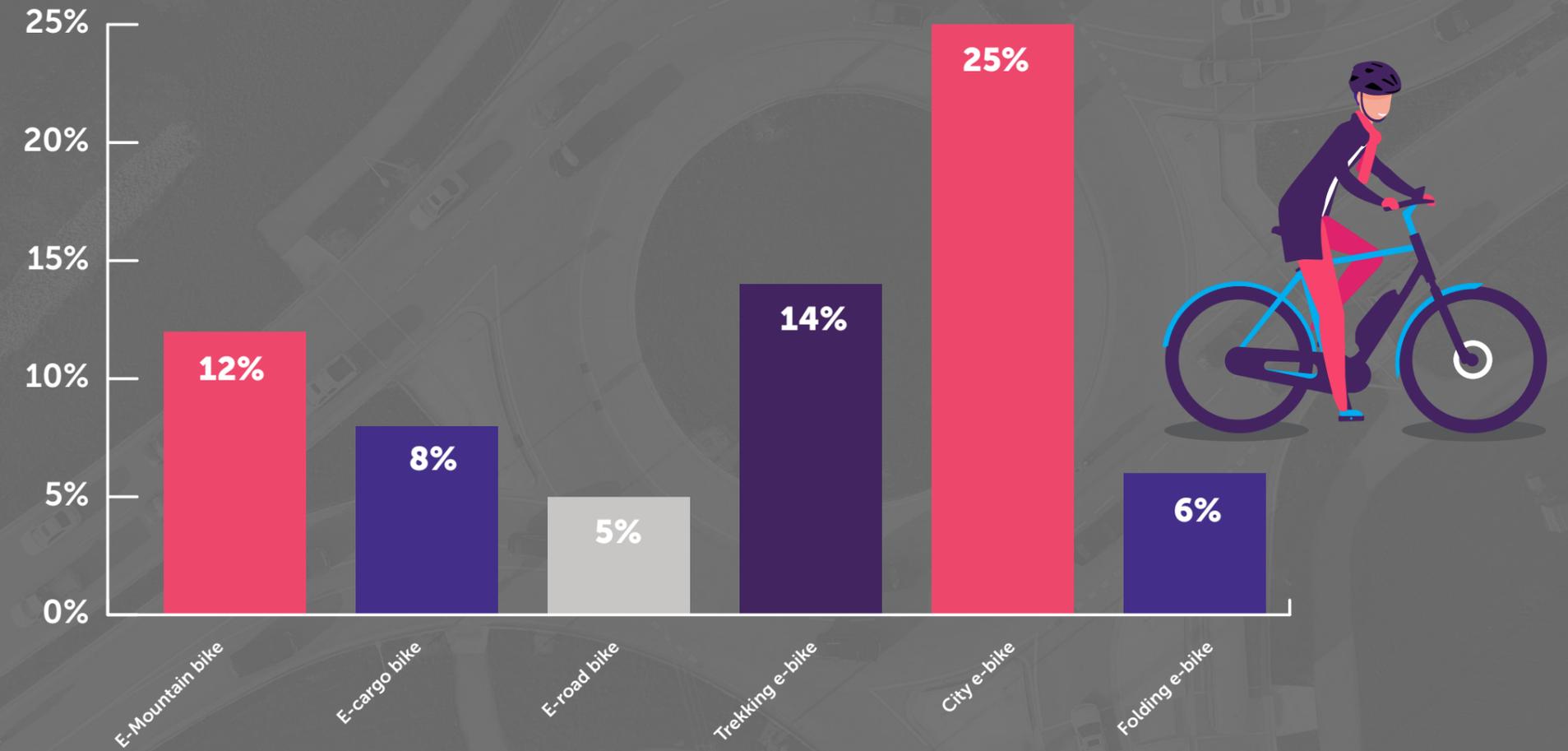
One quarter of Europeans intend to visit a bike shop in the next 12 months, but nearly one third do not own bikes.



Q4: How likely, if at all, are you to visit a bike shop to get your bike serviced over the next twelve months (i.e. before next June 2022)? (If you do not own a bike, please select the "Not applicable" option)

What styles of e-bike are Europeans most interested in?

If buying an e-bike, one in four Europeans would choose a city e-bike.



Q5: For the following question, please imagine you are currently considering buying an e-bike at a price you considered reasonable...Which, if any, of the following style of bike would you be most likely to buy?

One in four Europeans have said they are more likely to use or buy an e-bike now than they were before the COVID-19 pandemic.

Reasons to Ride
31% said they would use an e-bike to get daily exercise as part of their routine

Bike Choices
City e-bikes are the most popular choice (31%) amongst those who are likely to buy an e-bike in the next 12 months.

Bike Choices
One in ten (11%) are interested in electric cargo bikes

Bike Choices
One in five (20%) said they are likely to buy or use an electric mountain bike

Reasons to Ride
Over a third (37%) of those under 24 would use an E-Bike to lessen their impact on the environment

Bike Shop Visits
26% of those surveyed said they are likely to visit a bike shop to get their bike serviced in the next year

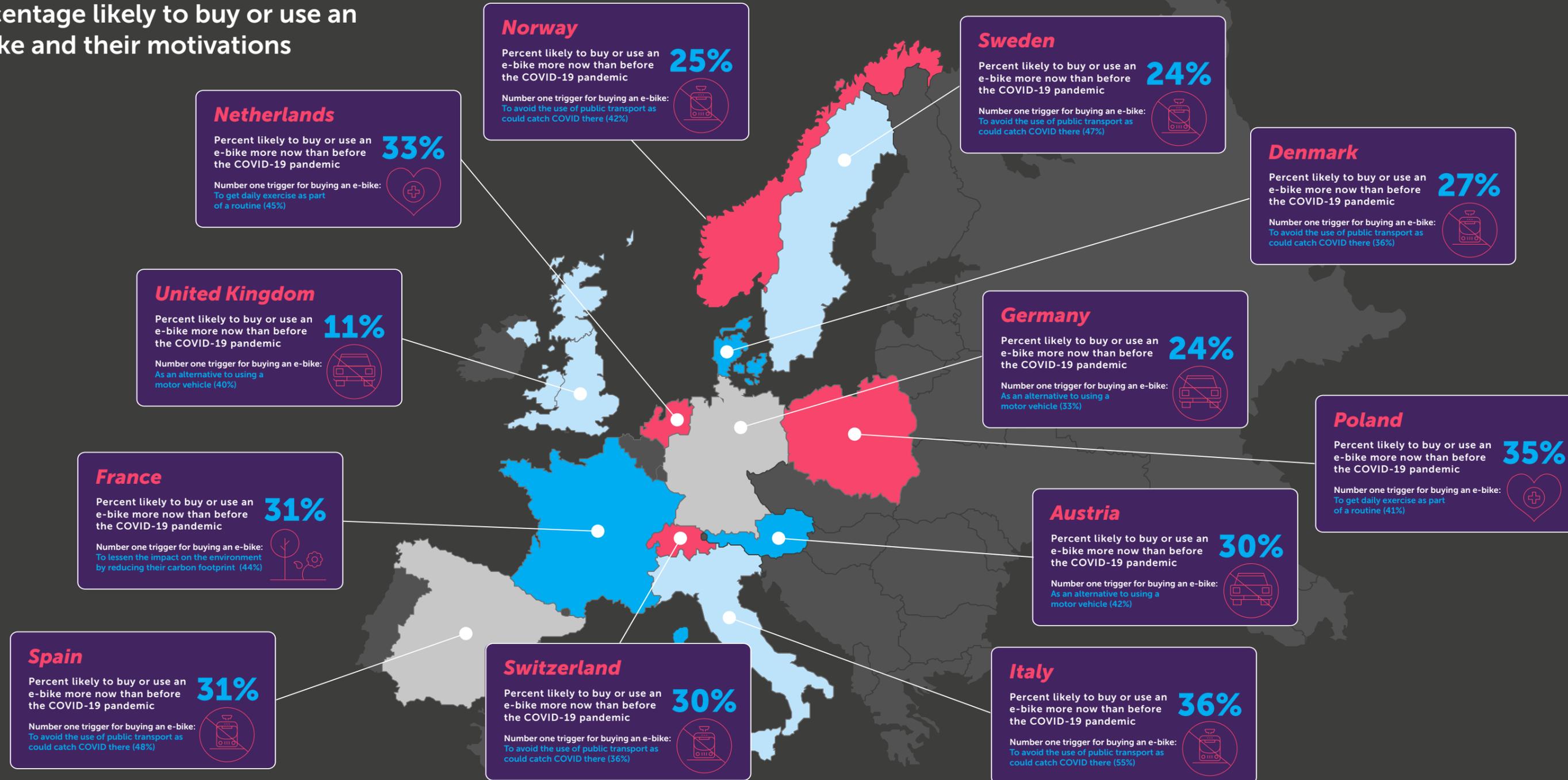
Reasons to Ride
Two-fifths (39%) would use an e-bike to avoid public transport

Reasons to Ride
For those under 35, a third (34%) said that using an e-bike is more time efficient

Reasons to Ride
Two fifths (41%) of those over the age of 55 are looking for an alternative to a motor vehicle

Environmental Matters
For those that are likely to buy or use an e-bike, nearly half (49%) have said they would use one as an alternative to a car and 38% to lessen their environmental impact

Percentage likely to buy or use an e-bike and their motivations

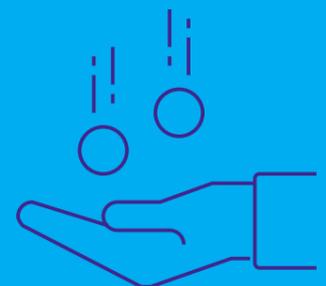


Behavioural changes 2020-2021

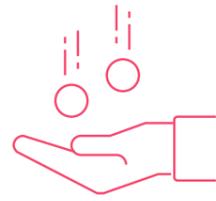


Concerns of catching COVID-19 on public transport is a clear driver of e-bike use for many countries, but it can also be seen that environmental concerns and a desire to minimise the use of motor vehicles is growing amongst e-bike users and potential e-bike users.

The number one barrier to e-bike use across Europe remains cost.



1 E-bike Purchasing

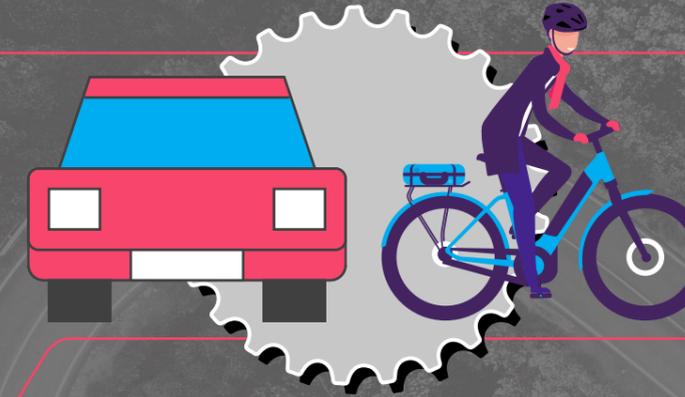


E-bike interest continues to grow, with behaviour changes, prompted by COVID-19 and environmental concerns encouraging more people to consider buying or hiring an e-bike in the next 12 months.

Younger people are a particular area for e-bike growth but whilst cost is a barrier across all age groups, it is highest amongst those under 44 in most countries. In these groups interest and desire to purchase is there, the barrier is the practical consideration of cost. Potentially it is those under 35 who would benefit most from hire schemes and subsidies.

Whilst cycling is growing in popularity, uptake may still be hampered by a 'lack of knowledge. This barrier followed closely behind cost in many countries, particularly Poland (39%). However, there is no correlation between a lack of knowledge and the perception that e-bikes are expensive.

Europe-wide, the most likely age groups to consider e-bikes were **25-34** and **35-44**



Older respondents were more likely to view an e-bike as a car replacement – **41%** of over **55s**

France and the Netherlands are the countries most concerned by the cost of e-bikes. Denmark is the least concerned.



Thought Leadership

Laura Laker

Researcher and journalist

I've been a fan of e-cycles ever since borrowing one with a step through frame and basket a few years ago. It opened up the city for me, and though I already cycled for a lot of everyday trips, it enabled me to cycle even more: a 20-mile round trip to the theatre in heels and a dress one balmy but blustery evening; crisscrossing the city to meetings in a suit – and all without breaking a sweat. An e-bike even gave me the courage to cycle the length of the UK, almost 1,000 miles in nine days.

We know there's potential for far more interest in e-bikes, given the right conditions. As I discovered, trying an electric cycle was crucial to understanding them – and since discovering them for myself I have shared my enthusiasm with friends, family, and even people in the street who ask about my whizzy machine. Again, and again bike shops tell me the same thing: trying e-bikes in a safe, traffic-free environment is crucial to customers seeing their potential, and to eventually buying one. With 27% respondents saying they were 'very likely' or 'fairly likely' to buy or use an e-bike in the next 12 months it is important that these interested consumers have the opportunity to try e-bikes for themselves, so their curiosity can be built upon with positive experience.

This survey shows people see e-bikes as genuine modes of transport, as well as good for their health and the environment, perhaps reflecting a recognition of e-bikes as tools, not toys. 'Avoiding the use of public transport as could catch COVID-19 there' was chosen by 39% of respondents overall, closely followed by 'as an alternative to using a motor vehicle' (38%). Getting exercise (31%) and improving general health (29%) were on a par with 'to lessen the impact on the environment' (29%).

While our preferences and concerns may differ, one universal barrier to e-bike uptake, head and shoulders above others, is cost, with 54% of respondents agreeing e-bikes are too expensive. This is without exception, even in countries where e-bikes represent more than half of all cycle sales.

This research, and the research that comes before it, tells us e-bikes can replace car trips, ease the burden on overcrowded public transport and help us tackle carbon emissions and air pollution – all for a fraction of the cost of electric cars. However, in many countries like the UK, e-bikes are the only electric vehicle that lacks a purchase subsidy to encourage greater use. Young people are particularly

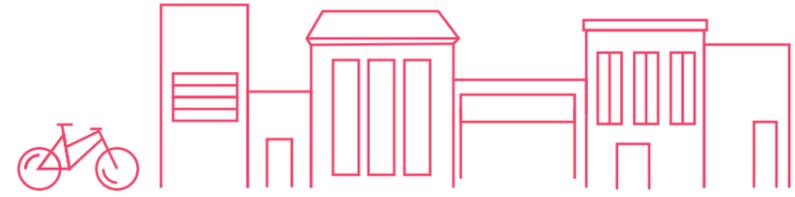
interested in e-cargo bikes, but they are the group most affected by their cost, indicating more could be done to help us transport more, from kids to shopping, by e-assisted pedal power. We know Europe's roads don't need more oversized SUVs, nor does our climate, and we need to draw people away from their gravitational pull.

We also know from research on the impacts of European purchase subsidies the power of financial incentives in boosting e-bike uptake – and it's no surprise many governments see them as worth investing in. Perhaps this research shows that if we want an e-bike revolution more needs to be done to lower the biggest barrier: cost.

We've still got a long way to go before e-bikes reach their full potential, not least in countries like the UK. This report shows that many people are interested in trying e-bikes following the pandemic, given the right conditions. It offers some valuable insight into what an e-bike future might look like, and how we get there – and I hope, if we are serious about boosting pedal power (power assisted or otherwise), we heed its lessons.



We know Europe's roads don't need more oversized SUVs, nor does our climate, and we need to draw people away from their gravitational pull.



Environmental concerns and the COVID-19 pandemic have been major drivers in behavior change in the last 12 months.

With regard to COVID-19 there is a difference between nations, with some more concerned about catching COVID-19 on public transport than others. Italy (55%), Sweden (47%) and Spain (48%) give the reason of avoiding public transport as their motivation to use an e-bike. In the area of environmental concerns there are age-group differences with those over 55 seeking an alternative to a personal motor car and those under-24 saying they would choose an e-bike to lessen their impact on the environment.

From the report it is clear that environmental concerns and the pandemic are pushing people towards e-cycling; however, for the two-thirds still unlikely to use an e-bike feeling unsafe is still a powerful deterrent.

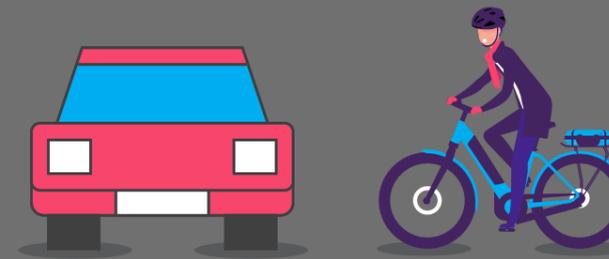
27% of Europeans have said they are more likely to use or buy an e-bike now than they were before the COVID-19 Pandemic



Over half of those in Italy (55%) would consider using an e-bike to avoid public transport, whereas in Spain, 50% would use as an alternative to using a motor vehicle.



For the 66% of Europeans who are less likely to buy or use an e-bike 24% say it's due to a lack of safe cycling infrastructure in their towns and cities



Over one third (37%) of those under 24 said they would use an e-bike to lessen their impact on the environment



Thought Leadership

Roman Meliška

Business consultant

Roman Meliška specialises in all things active urban mobility and is a founder of Urban Laab. He creates a Czech newsletter on urban mobility called Kolem na kole, co-hosts an Urban Caast podcast, amongst other projects. He worked at ŠKODA (Volkswagen Group) for 10 years before going independent.

It's official: people in Germany alone bought more e-bikes in 2020 than electrified cars were sold in all of Europe (Germany e-bike sales: 1.95 mil. Europe e-car sales: 1.34 mil.) And in the Netherlands, for decades one of the innovators of modern urban mobility, new e-bikes outsold all new cars in 2020. Not just electric vehicles. All cars. (by 53%, actually; 547,000 e-bikes vs 357,414 cars)

Now, looking at the media landscape and the policy discourse, does it feel like the beautiful, two centuries old invention called a bicycle is finally getting the attention it deserves when it comes to urban mobility for the 21st century? No? Especially now we can pair it with the light batteries and connectivity guaranteed through smartphones in every pocket.

At the end of the day, the growing popularity of electric bicycles is not news, sales have been on a double digit rise for a decade now and the market keeps on attracting both new talent and investors. But there is a definite strong and vocal tide moving towards more use of e-bikes to solve our urban transport problems.

European Commission's executive vice-president Frans Timmermans is amongst the most prominent voices on the European level rooting for #MoreCycling as campaigned for by the European Cycling Federation and Cycling Industries Europe. Even the Financial Times is starting to watch the industry closely. Changes are happening especially quickly on the city level, which makes a lot of sense, as most of us already live in the cities and 2.5 billion more people are expected to move into them in the coming decades. Plus, the majority of our trips - no matter if we recognise it or not - are short (up to 5km).

There are a few questions linked to this growth: how will we move around? And what happens with all the space wasted currently in our cities for 2-ton four-wheelers? No matter whether diesel or electric cars occupy the same amount of valuable urban space. Will we keep on making housing

cars easier than housing people? And does it make more sense to put 500 kg of electric batteries into one car or make 150 e-bikes and e-cargo bikes? May the data from the latest European survey for this edition of Shimano State of the Nation report be of a guidance for all thoughtful stakeholders.

The COVID-19 pandemic demonstrated the differences in leadership rather clearly. Some cities were rocket-fast in reallocating their public space for people walking and cycling, making it more convenient and more inviting for an all-new cohort of folks of all ages to move independently around their city. Freedom in urban mobility? Paris, Berlin, London or Tirana gained a well-deserved round of applause, while others opted to sit back and watch, gaining even worse congestion, air and noise pollution than before.

Interestingly enough, it was especially cities lead by female mayors or vice-mayors that haven't wasted the crisis and brought their cities into the future: Barcelona (Ada Colau), Paris (Anne Hidalgo), Brussels (Elke Van den Brandt), Helsinki (Anni Sinnemäki), Rome (Virginia Raggi) or Vienna (Birgit Hebein), to name a few.

The data from the latest European survey for this edition of Shimano State of the Nation report only confirms the attitude: not feeling safe on the current cycling infrastructure ranks among the very top reasons across all 12 countries as to why more people do not ride around the city on an (e-)bike. What Paris and other cities are doing is a masterclass worth following.

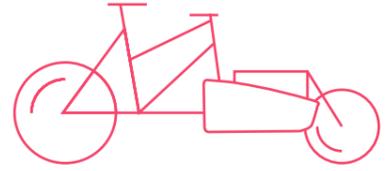
The overall pace at which e-bikes are gaining popularity is still increasing. In some countries like Spain or Italy up to 36% of people are more likely to buy an e-bike now than before the pandemic hit last year. That's a lot of untapped market opportunities and soon a lot of new groups of all ages wanting their safe space in the city.

Two major reasons to get an e-bike are high on the list of user's motivations: avoiding crowded public transportation and having an alternative to using a motor vehicle. National and age group attitudes vary of course, which offers a great tool for tailoring a successful communication campaign to respective markets. What ranks at the top in the Netherlands - building an exercise into people's daily routine (45%, pretty consistent across all age groups) can be found much lower in the ranking in Sweden.

Similar variation in preferences can be found in the choice of e-bike style: while city e-bikes rank at the very top across Europe (from 20% in France to 45% in the Netherlands), cargo bikes are only just gaining a foothold above 10%, but in some markets and segments it reaches above 20% of customer intentions to buy (Denmark, Netherlands and Norway, especially in 18-34 years segments for example). As with every innovation, some join early, some follow later and some remain laggards. Choose your strategies wisely.

No matter whether diesel or electric, cars occupy the same amount of valuable urban space. Does it make more sense to put 500kg of electric batteries into one car or make 150 e-bikes and e-cargo bikes?





City e-bikes are the preferred choice with those likely to buy or use an e-bike in the next 12-months, showing the role e-bikes can play in our urban mobility.

There is a slight gender difference between the style of bikes preferred and the reasons for riding (although this varies country to country). More women choose city bikes than men. Over one third (38%) of people likely to use an e-bike say that they would use one as an alternative to a car, although it is mainly the younger age-groups who are considering a e-cargo bike. As it is also the younger age-groups most affected by cost as a barrier, subsidised e-cargo bike sales or e-cargo bike hire schemes may further encourage this group to use e-cargo bikes on a regular basis.

9% more men than women like the sportier e-mountain bikes and **8%** more women than men prefer the practical city e-bike.



One in three (31%) said they were likely to buy or use a city e-bike in the next 12 months.



18-24 year olds (12%) and **25-34 year olds (13%)** are the age groups most likely to buy an e-cargo bike.



Thought Leadership

Beate Kubitz

Director, Cargodale CIC, Director, Beate Kubitz Associates Ltd

Beate Kubitz is a new mobility consultant who has worked with government and commercial clients on a diverse portfolio of projects from transport data policy to bike share and mobility hubs. She was awarded a Fellowship by the Foundation for Integrated Transport. In 2020 she founded Cargodale to provide zero emission delivery services during lockdown. The project has grown into a fully-fledged community interest company serving several towns in the Calder Valley.

Cargodale is a community interest company set up during the pandemic to deliver food and goods to people in lockdown using e-cargobikes. It has grown to provide a local delivery service for a number of businesses plus a community 'try before you buy' e-cargobike hire.

At Cargodale, we've been part of a wave of interest in e-cargobikes in the UK over the last year and we've shared our experience across the length and breadth of the country, as other areas have set up their own projects to provide local delivery services and opportunities for people to see and try e-cargobikes in action.

Given the huge numbers of people cycling during lockdown in the UK, it's not surprising that 40% of people are saying that they see e-bikes as alternative to driving. Our experience has been that there's a lot more interest and enthusiasm for e-cargobikes where projects such as ours exist. Our local town liked the lockdown delivery service we provided so much that they assisted us in setting up a hub in our local market, buying additional e-cargobikes to ensure a longer-term future for the project.

Riding around our town we have a high profile and a number of families have approached us to see whether they can try out e-cargobiking and see if it suits their circumstances. When people can try an e-cargo bike, or see one in use, they are more able to visualise how it can be a part of their lifestyle.

It's disappointing that in the UK the overall number of people who would consider buying an e-cargobike is only 5%. However, in context, it's not so much lower than the percentage of people who would consider it in Germany (7%) or the Netherlands (8%) so maybe the UK has begun to wake up to the potential for e-cargobiking.

The e-aspect is really important in hilly or mountainous areas of Europe. In the UK we have several cities built on hills and some of the roads are really steep, built when people prioritised direct routes over gentle gradients, so a motor is essential with a load-carrying bike.

At Cargodale we really value e-cargobike motors that pack a punch as we've used them to haul cases of beer, veg boxes and Christmas turkeys up some very challenging inclines. It's also handy to have a narrow vehicle on historic streets that were built before the motor car, this is relevant in many European cities. Squeezing heavy motor vehicles through unsuitable roads causes all sorts of damage.

One of the interesting things about the survey is the different attitudes to cost and safety between countries. In the UK cost is the biggest reason given not to buy or use an e-bike (49%), but 'not feeling safe' is not far behind (41%).

This is not surprising. In the UK, we have witnessed an ongoing battle to establish a useful network of cycle lanes. During the pandemic the (extremely sparse) cycle infrastructure provision was augmented with pop-up cycle lanes but many have been removed over the course of the last year.

However, in countries with more developed infrastructure, safety is much less of a concern. Concerns about safety are low as 12% in Denmark, 17% in Germany and 21% in the Netherlands whilst cost is a much bigger deterrent (42% in Denmark, 54% in Germany and 64% in the Netherlands).

To me, this says that we have a long way to go to make infrastructure better in the UK – and really it should be a priority if we want to grow the number of people cycling. Cost is a stumbling block everywhere but it's notable that concerns about safety are so much greater here in the UK than elsewhere.

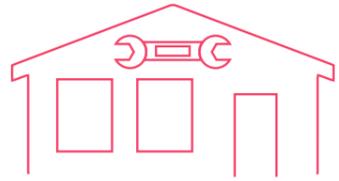
Better infrastructure is an important step for helping those 40% of people who now see that e-bikes are a potential substitute for driving turn into happy, habitual cyclists – which will make the roads safer, air quality better and help us reach Net Zero.

Showing that there's an alternative to motor vehicles is really important to us. Hopefully more people will see how handy e-cargobikes are because of projects like ours.



A motor is essential with a load-carrying bike. There's a lot more interest and enthusiasm for e-cargobikes where projects such as ours exist.

4 Bike Shops



Bike shops play an important role in the recovery of the 'High Street,' and in the education of potential e-bike users.

During the COVID-19 pandemic shopping habits changed, with a large proportion of shopping shifting to online. Bricks and mortar bike shops however provided an important service with many European countries allowing bike shops, as essential businesses, to open throughout lockdowns. Over a quarter (26%) of bike owners say they will visit a bike shop in the next 12-months.

Along with bike sales and bike servicing bike shops offer an invaluable source of expertise, this is especially relevant in countries that cite 'lack of knowledge' as a barrier to e-bike use. Buying advice and demo rides have been shown to play a significant role in supporting potential users to make e-bike purchases, but firstly newcomers to cycling have to be attracted in the door.

Only **11%** of UK bike owners are likely to visit a bike shop in next 12-months compared with **40%** of Dutch bike owners and **42%** of Polish bike owners.



Only **14%** of Dutch respondents don't own a bike, compared to **51%** of UK residents.



One in three (**31%**) said they were likely to buy or use a City e-bike in the next 12 months.

It is now 18 months since the beginning of the COVID-19 pandemic, it has changed our society and behaviours in a way that we could not have predicted when we wrote our original 2019 State of the Nation Report.

Reduced use of public transport, the need for outdoor exercise and more home working has driven high demand for bicycles throughout the pandemic, and many of the new cyclists who began cycling because of COVID-19 have continued to use their bikes, even as restrictions have eased.

As we recover from the pandemic it is the climate crisis that is rising to the top of public concern and along with that, attitudes to motor vehicle use are changing. Our survey revealed that an increasing number of Europeans say they would use an e-bike as an alternative to a private car, however when it comes to cost e-bikes are still seen by most as a premium or luxury purchase.

One of the goals of this report is to better understand the motivations and attitudes of potential e-bike users. That a 'lack of knowledge' is still cited as a barrier to e-bike purchase shows how much work we still need to do. 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 14,419 adults. Fieldwork was undertaken between 19th - 29th July 2021. The survey was carried out online. Fieldwork was undertaken in Austria, Denmark, France, Germany, Italy, Netherlands, Norway, Poland, Spain, Sweden, Switzerland, United Kingdom.

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

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Published September 2021



Austria

1. How much more likely or unlikely are you to buy or use an e-bike now compared to before the pandemic, or has it remained the same?

RESPONSE	TOTAL	Age					Gender	
		18-24	25-34	35-44	45-54	55+	Male	Female
Likely	30%	21%	30%	31%	34%	30%	33%	27%
Not likely	66%	69%	67%	66%	63%	66%	62%	69%

2. Which, if any, of the following do you think are reasons people are more likely to buy/ use e-bikes now compared to before the COVID-19 Pandemic?

RESPONSE	TOTAL	Age					Gender	
		18-24	25-34	35-44	45-54	55+	Male	Female
To avoid the use of public transport as could catch COVID-19 there	29%	33%	30%	34%	25%	28%	27%	32%
To get daily exercise as part of a routine	28%	34%	34%	23%	28%	27%	25%	32%
As an alternative to using a motor vehicle	42%	46%	46%	38%	42%	42%	43%	41%
To lessen the impact on the environment by reducing their carbon footprint	27%	33%	32%	27%	23%	25%	27%	27%
To improve their general health	33%	41%	33%	29%	33%	33%	32%	34%
It's more time efficient than other transportation	19%	28%	17%	18%	20%	18%	21%	17%
None of these	16%	11%	15%	18%	15%	18%	17%	16%
Don't know	6%	6%	5%	6%	5%	7%	6%	7%

3. Which, if any, of the following do you think are reasons people are less likely to buy/ use e-bikes now compared to before the COVID-19 Pandemic?

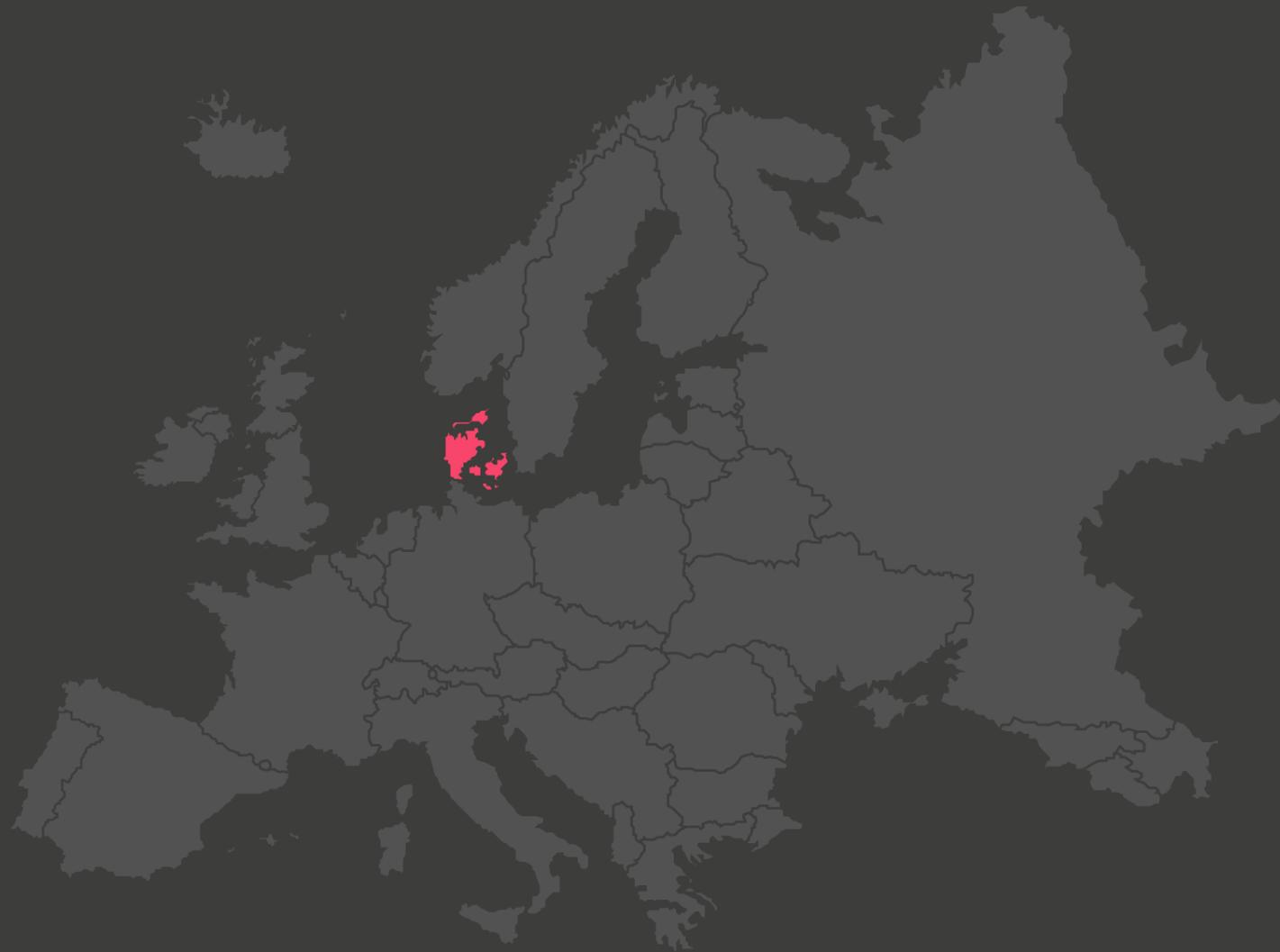
RESPONSE	TOTAL	Age					Gender	
		18-24	25-34	35-44	45-54	55+	Male	Female
Not feeling safe riding one (e.g. a lack of cycling infrastructure in their town or city)	17%	21%	15%	16%	14%	18%	16%	17%
People don't know enough about e-bikes	16%	20%	17%	15%	12%	17%	16%	16%
E-bikes are a cheat compared to using regular bikes (e.g. it is not your own pedal power)	15%	19%	19%	15%	13%	13%	16%	14%
E-bikes are for older people	10%	15%	12%	12%	11%	6%	11%	8%
Their fitness would not improve (e.g. because they would not be pushing themselves enough)	20%	21%	24%	21%	17%	19%	23%	17%
E-bikes are too expensive	55%	56%	57%	58%	58%	52%	54%	56%
None of these	12%	6%	8%	14%	13%	15%	13%	12%
Don't know	9%	11%	9%	5%	7%	10%	8%	9%

4. How likely, if at all, are you to visit a bike shop to get your bike serviced over the next twelve months (i.e. before next June 2022)?

RESPONSE	TOTAL	Age					Gender	
		18-24	25-34	35-44	45-54	55+	Male	Female
Likely	34%	28%	36%	39%	33%	32%	35%	32%
Not Likely	37%	47%	38%	39%	37%	32%	36%	37%
Not applicable - I do not own a bike	24%	22%	21%	15%	22%	30%	24%	25%

5. For the following question, please imagine you are currently considering buying an e-bike at a price you consider reasonable...Which ONE, if any, of the following style of bike would you be most likely to buy?

RESPONSE	TOTAL	Age					Gender	
		18-24	25-34	35-44	45-54	55+	Male	Female
E-Mountain bike	16%	20%	27%	20%	22%	7%	21%	12%
E-Cargo bike	8%	10%	13%	13%	6%	6%	9%	8%
E-Road bike	1%	3%	1%	1%	3%	0%	2%	1%
Trekking e-bike	22%	18%	24%	24%	16%	25%	23%	22%
City e-bike	25%	24%	15%	21%	23%	31%	20%	30%
Folding e-bike	5%	6%	5%	4%	6%	4%	4%	6%
None of these	19%	14%	12%	14%	20%	23%	19%	18%
Don't know	4%	4%	4%	3%	3%	4%	2%	5%



Denmark

1. How much more likely or unlikely are you to buy or use an e-bike now compared to before the pandemic, or has it remained the same?

RESPONSE	TOTAL	Age					Gender	
		18-24	25-34	35-44	45-54	55+	Male	Female
Likely	27%	30%	33%	34%	26%	21%	25%	28%
Not likely	55%	53%	45%	46%	57%	62%	60%	50%

2. Which, if any, of the following do you think are reasons people are more likely to buy/ use e-bikes now compared to before the COVID-19 Pandemic?

RESPONSE	TOTAL	Age					Gender	
		18-24	25-34	35-44	45-54	55+	Male	Female
To avoid the use of public transport as could catch COVID-19 there	36%	35%	33%	41%	37%	37%	34%	38%
To get daily exercise as part of a routine	34%	27%	26%	31%	38%	38%	32%	35%
As an alternative to using a motor vehicle	34%	30%	34%	33%	31%	37%	35%	33%
To lessen the impact on the environment by reducing their carbon footprint	22%	27%	28%	24%	21%	17%	19%	24%
To improve their general health	22%	17%	21%	24%	22%	23%	23%	21%
It's more time efficient than other transportation	17%	20%	19%	19%	16%	15%	19%	15%
None of these	7%	1%	9%	6%	10%	7%	9%	6%
Don't know	22%	27%	23%	18%	22%	22%	21%	24%

3. Which, if any, of the following do you think are reasons people are less likely to buy/ use e-bikes now compared to before the COVID-19 Pandemic?

RESPONSE	TOTAL	Age					Gender	
		18-24	25-34	35-44	45-54	55+	Male	Female
Not feeling safe riding one (e.g. a lack of cycling infrastructure in their town or city)	12%	13%	11%	15%	6%	15%	13%	11%
People don't know enough about e-bikes	9%	9%	8%	9%	6%	11%	11%	7%
E-bikes are a cheat compared to using regular bikes (e.g it is not your own pedal power)	17%	24%	21%	22%	15%	13%	17%	17%
E-bikes are for older people	10%	14%	11%	13%	10%	8%	12%	8%
Their fitness would not improve (e.g. because they would not be pushing themselves enough)	16%	22%	17%	18%	14%	14%	18%	13%
E-bikes are too expensive	42%	39%	40%	48%	49%	40%	44%	41%
None of these	8%	6%	8%	10%	8%	9%	8%	8%
Don't know	32%	31%	27%	23%	36%	36%	29%	35%

4. How likely, if at all, are you to visit a bike shop to get your bike serviced over the next twelve months (i.e. before next June 2022)?

RESPONSE	TOTAL	Age					Gender	
		18-24	25-34	35-44	45-54	55+	Male	Female
Likely	29%	28%	30%	30%	22%	31%	29%	28%
Not Likely	36%	43%	38%	41%	40%	29%	37%	34%
Not applicable - I do not own a bike	28%	17%	23%	23%	31%	34%	27%	29%

5. For the following question, please imagine you are currently considering buying an e-bike at a price you consider reasonable...Which ONE, if any, of the following style of bike would you be most likely to buy?

RESPONSE	TOTAL	Age					Gender	
		18-24	25-34	35-44	45-54	55+	Male	Female
E-Mountain bike	7%	9%	8%	5%	11%	3%	10%	3%
E-Cargo bike	13%	17%	27%	25%	7%	4%	12%	14%
E-Road bike	4%	3%	7%	5%	3%	4%	5%	3%
Trekking e-bike	8%	7%	6%	8%	9%	10%	9%	8%
City e-bike	28%	28%	21%	29%	29%	31%	23%	32%
Folding e-bike	2%	3%	1%	1%	1%	2%	2%	2%
None of these	21%	12%	13%	17%	26%	27%	23%	20%
Don't know	17%	20%	16%	10%	14%	19%	15%	19%



Europe

1. How much more likely or unlikely are you to buy or use an e-bike now compared to before the pandemic, or has it remained the same?

RESPONSE	TOTAL	Age					Gender	
		18-24	25-34	35-44	45-54	55+	Male	Female
Likely	27%	26%	33%	30%	27%	23%	29%	25%
Not likely	66%	65%	59%	63%	65%	71%	64%	68%

2. Which, if any, of the following do you think are reasons people are more likely to buy/ use e-bikes now compared to before the COVID-19 Pandemic?

RESPONSE	TOTAL	Age					Gender	
		18-24	25-34	35-44	45-54	55+	Male	Female
To avoid the use of public transport as could catch COVID-19 there	39%	37%	38%	40%	38%	39%	34%	43%
To get daily exercise as part of a routine	31%	32%	31%	31%	31%	32%	29%	34%
As an alternative to using a motor vehicle	38%	36%	35%	37%	37%	41%	38%	38%
To lessen the impact on the environment by reducing their carbon footprint	29%	37%	31%	30%	26%	27%	27%	31%
To improve their general health	29%	32%	29%	29%	28%	29%	28%	31%
It's more time efficient than other transportation	22%	26%	24%	22%	22%	20%	22%	22%
None of these	12%	9%	12%	12%	13%	13%	14%	11%
Don't know	11%	11%	10%	10%	11%	11%	11%	10%

3. Which, if any, of the following do you think are reasons people are less likely to buy/ use e-bikes now compared to before the COVID-19 Pandemic?

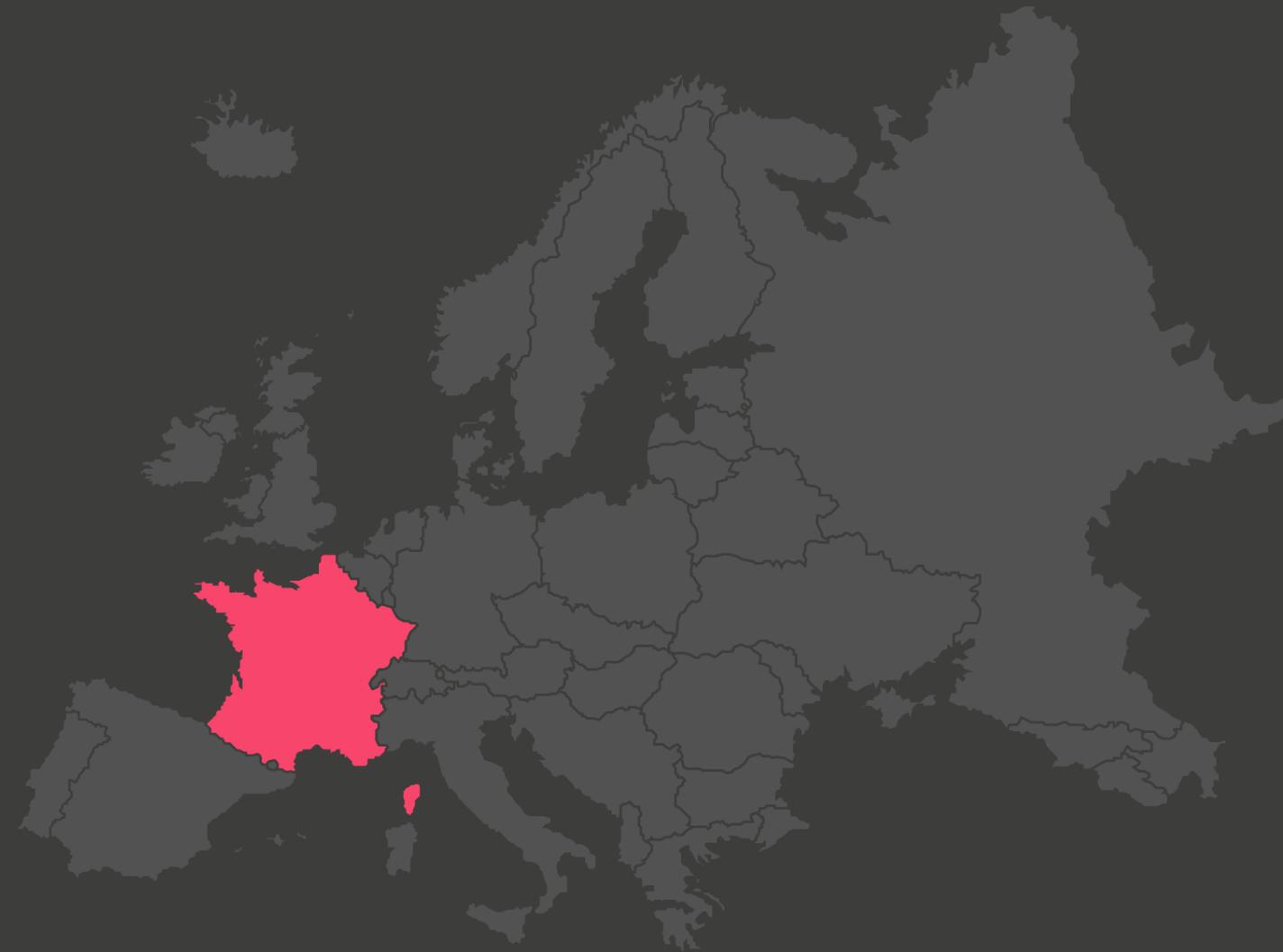
RESPONSE	TOTAL	Age					Gender	
		18-24	25-34	35-44	45-54	55+	Male	Female
Not feeling safe riding one (e.g. a lack of cycling infrastructure in their town or city)	24%	29%	24%	22%	20%	25%	22%	25%
People don't know enough about e-bikes	19%	21%	19%	19%	15%	19%	18%	19%
E-bikes are a cheat compared to using regular bikes (e.g. it is not your own pedal power)	14%	20%	16%	14%	12%	12%	15%	13%
E-bikes are for older people	7%	13%	9%	8%	7%	6%	8%	6%
Their fitness would not improve (e.g. because they would not be pushing themselves enough)	18%	22%	19%	18%	16%	17%	19%	17%
E-bikes are too expensive	54%	52%	52%	55%	56%	53%	53%	54%
None of these	9%	7%	7%	8%	10%	11%	10%	9%
Don't know	14%	12%	13%	13%	14%	15%	14%	15%

4. How likely, if at all, are you to visit a bike shop to get your bike serviced over the next twelve months (i.e. before next June 2022)?

RESPONSE	TOTAL	Age					Gender	
		18-24	25-34	35-44	45-54	55+	Male	Female
Likely	26%	21%	29%	30%	26%	24%	28%	24%
Not Likely	38%	45%	39%	40%	40%	34%	39%	36%
Not applicable - I do not own a bike	30%	27%	26%	24%	27%	37%	27%	34%

5. For the following question, please imagine you are currently considering buying an e-bike at a price you consider reasonable...Which ONE, if any, of the following style of bike would you be most likely to buy?

RESPONSE	TOTAL	Age					Gender	
		18-24	25-34	35-44	45-54	55+	Male	Female
E-Mountain bike	12%	17%	18%	17%	15%	6%	17%	8%
E-Cargo bike	8%	12%	13%	9%	6%	4%	8%	7%
E-Road bike	5%	7%	6%	5%	5%	4%	6%	4%
Trekking e-bike	14%	11%	13%	15%	15%	15%	16%	13%
City e-bike	25%	23%	21%	22%	24%	29%	21%	29%
Folding e-bike	6%	5%	6%	5%	5%	6%	5%	7%
None of these	21%	15%	14%	18%	21%	26%	20%	21%
Don't know	9%	10%	9%	9%	9%	10%	8%	10%



France

1. How much more likely or unlikely are you to buy or use an e-bike now compared to before the pandemic, or has it remained the same?

RESPONSE	TOTAL	Age					Gender	
		18-24	25-34	35-44	45-54	55+	Male	Female
Likely	32%	29%	35%	32%	32%	30%	36%	27%
Not likely	64%	66%	61%	65%	60%	65%	60%	67%

2. Which, if any, of the following do you think are reasons people are more likely to buy/ use e-bikes now compared to before the COVID-19 Pandemic?

RESPONSE	TOTAL	Age					Gender	
		18-24	25-34	35-44	45-54	55+	Male	Female
To avoid the use of public transport as could catch COVID-19 there	38%	40%	40%	36%	35%	40%	30%	46%
To get daily exercise as part of a routine	36%	31%	40%	38%	37%	34%	34%	37%
As an alternative to using a motor vehicle	42%	41%	40%	41%	39%	43%	41%	42%
To lessen the impact on the environment by reducing their carbon footprint	44%	58%	50%	47%	36%	39%	39%	47%
To improve their general health	36%	43%	35%	34%	27%	38%	30%	40%
It's more time efficient than other transportation	35%	41%	33%	37%	38%	33%	33%	37%
None of these	7%	10%	7%	7%	6%	7%	7%	7%
Don't know	6%	4%	7%	4%	7%	7%	8%	5%

3. Which, if any, of the following do you think are reasons people are less likely to buy/ use e-bikes now compared to before the COVID-19 Pandemic?

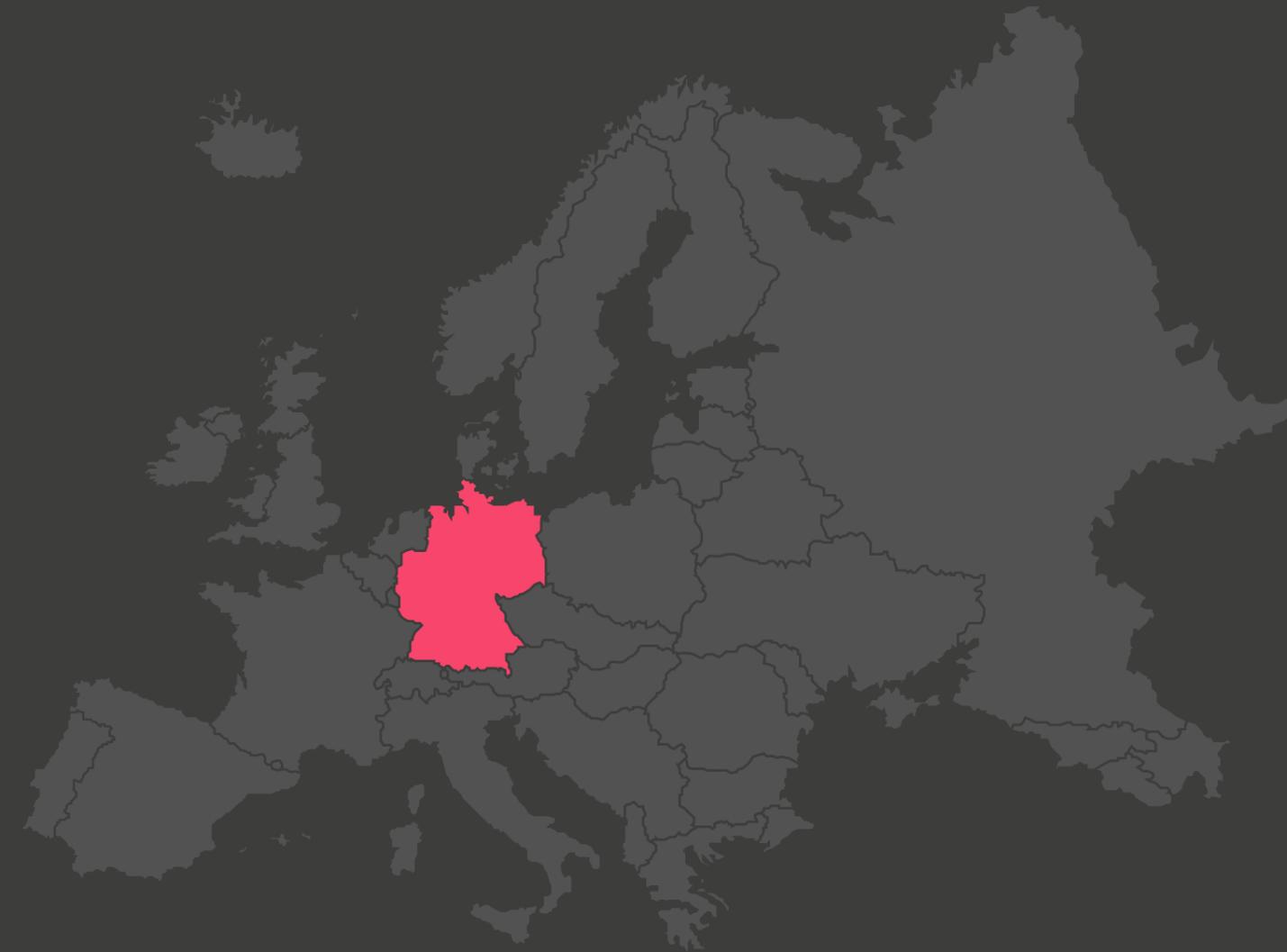
RESPONSE	TOTAL	Age					Gender	
		18-24	25-34	35-44	45-54	55+	Male	Female
Not feeling safe riding one (e.g. a lack of cycling infrastructure in their town or city)	29%	33%	33%	24%	26%	30%	30%	28%
People don't know enough about e-bikes	13%	11%	15%	15%	13%	13%	13%	14%
E-bikes are a cheat compared to using regular bikes (e.g. it is not your own pedal power)	14%	33%	17%	18%	8%	9%	14%	14%
E-bikes are for older people	7%	11%	8%	6%	3%	7%	7%	7%
Their fitness would not improve (e.g. because they would not be pushing themselves enough)	15%	19%	21%	16%	11%	12%	14%	15%
E-bikes are too expensive	67%	48%	62%	71%	71%	70%	64%	70%
None of these	6%	12%	5%	7%	7%	5%	7%	6%
Don't know	9%	7%	11%	7%	6%	11%	9%	9%

4. How likely, if at all, are you to visit a bike shop to get your bike serviced over the next twelve months (i.e. before next June 2022)?

RESPONSE	TOTAL	Age					Gender	
		18-24	25-34	35-44	45-54	55+	Male	Female
Likely	21%	12%	21%	33%	18%	20%	25%	18%
Not Likely	42%	47%	49%	42%	52%	35%	44%	41%
Not applicable - I do not own a bike	32%	33%	24%	21%	25%	42%	27%	38%

5. For the following question, please imagine you are currently considering buying an e-bike at a price you consider reasonable...Which ONE, if any, of the following style of bike would you be most likely to buy?

RESPONSE	TOTAL	Age					Gender	
		18-24	25-34	35-44	45-54	55+	Male	Female
E-Mountain bike	18%	35%	23%	23%	19%	10%	24%	12%
E-Cargo bike	6%	14%	7%	7%	6%	3%	6%	6%
E-Road bike	8%	7%	10%	8%	10%	8%	9%	8%
Trekking e-bike	19%	7%	19%	16%	22%	22%	20%	18%
City e-bike	20%	16%	14%	23%	15%	24%	17%	23%
Folding e-bike	7%	5%	7%	6%	6%	9%	5%	10%
None of these	15%	15%	14%	10%	18%	17%	13%	17%
Don't know	6%	2%	6%	7%	5%	8%	6%	6%



Germany

1. How much more likely or unlikely are you to buy or use an e-bike now compared to before the pandemic, or has it remained the same?

RESPONSE	TOTAL	Age					Gender	
		18-24	25-34	35-44	45-54	55+	Male	Female
Likely	24%	22%	30%	26%	26%	21%	26%	22%
Not likely	70%	69%	64%	68%	67%	75%	67%	73%

2. Which, if any, of the following do you think are reasons people are more likely to buy/ use e-bikes now compared to before the COVID-19 Pandemic?

RESPONSE	TOTAL	Age					Gender	
		18-24	25-34	35-44	45-54	55+	Male	Female
To avoid the use of public transport as could catch COVID-19 there	30%	33%	30%	32%	30%	28%	26%	33%
To get daily exercise as part of a routine	25%	29%	25%	25%	25%	23%	24%	25%
As an alternative to using a motor vehicle	33%	35%	32%	30%	32%	36%	33%	34%
To lessen the impact on the environment by reducing their carbon footprint	23%	34%	26%	22%	21%	20%	22%	23%
To improve their general health	29%	32%	26%	29%	31%	28%	29%	28%
It's more time efficient than other transportation	16%	16%	21%	16%	17%	14%	17%	15%
None of these	26%	12%	19%	27%	25%	31%	25%	26%
Don't know	9%	14%	8%	9%	11%	8%	8%	10%

3. Which, if any, of the following do you think are reasons people are less likely to buy/ use e-bikes now compared to before the COVID-19 Pandemic?

RESPONSE	TOTAL	Age					Gender	
		18-24	25-34	35-44	45-54	55+	Male	Female
Not feeling safe riding one (e.g. a lack of cycling infrastructure in their town or city)	17%	20%	18%	11%	10%	20%	15%	18%
People don't know enough about e-bikes	11%	16%	12%	10%	9%	11%	10%	12%
E-bikes are a cheat compared to using regular bikes (e.g. it is not your own pedal power)	15%	26%	19%	14%	11%	13%	17%	13%
E-bikes are for older people	8%	17%	12%	8%	8%	5%	11%	6%
Their fitness would not improve (e.g. because they would not be pushing themselves enough)	19%	24%	20%	18%	17%	20%	21%	18%
E-bikes are too expensive	54%	57%	51%	57%	53%	53%	54%	53%
None of these	17%	9%	11%	14%	18%	22%	16%	18%
Don't know	10%	12%	9%	12%	11%	10%	10%	11%

4. How likely, if at all, are you to visit a bike shop to get your bike serviced over the next twelve months (i.e. before next June 2022)?

RESPONSE	TOTAL	Age					Gender	
		18-24	25-34	35-44	45-54	55+	Male	Female
Likely	23%	19%	32%	27%	22%	20%	26%	21%
Not Likely	44%	56%	40%	44%	49%	40%	45%	42%
Not applicable - I do not own a bike	26%	18%	20%	20%	21%	34%	21%	31%

5. For the following question, please imagine you are currently considering buying an e-bike at a price you consider reasonable...Which ONE, if any, of the following style of bike would you be most likely to buy?

RESPONSE	TOTAL	Age					Gender	
		18-24	25-34	35-44	45-54	55+	Male	Female
E-Mountain bike	13%	24%	23%	18%	13%	4%	16%	10%
E-Cargo bike	7%	10%	13%	8%	7%	4%	7%	6%
E-Road bike	1%	3%	2%	1%	2%	1%	2%	1%
Trekking e-bike	19%	18%	15%	24%	22%	18%	22%	16%
City e-bike	22%	18%	20%	15%	21%	26%	18%	26%
Folding e-bike	4%	4%	3%	2%	4%	5%	3%	5%
None of these	27%	16%	17%	23%	25%	36%	25%	29%
Don't know	7%	8%	7%	8%	7%	6%	6%	7%



Italy

1. How much more likely or unlikely are you to buy or use an e-bike now compared to before the pandemic, or has it remained the same?

RESPONSE	TOTAL	Age					Gender	
		18-24	25-34	35-44	45-54	55+	Male	Female
Likely	36%	37%	43%	38%	36%	33%	39%	34%
Not likely	58%	58%	53%	55%	54%	62%	54%	61%

2. Which, if any, of the following do you think are reasons people are more likely to buy/ use e-bikes now compared to before the COVID-19 Pandemic?

RESPONSE	TOTAL	Age					Gender	
		18-24	25-34	35-44	45-54	55+	Male	Female
To avoid the use of public transport as could catch COVID-19 there	55%	63%	50%	48%	54%	58%	51%	59%
To get daily exercise as part of a routine	27%	20%	26%	24%	27%	29%	28%	26%
As an alternative to using a motor vehicle	44%	38%	40%	42%	37%	49%	43%	45%
To lessen the impact on the environment by reducing their carbon footprint	23%	29%	26%	24%	18%	23%	20%	26%
To improve their general health	23%	24%	25%	23%	25%	22%	23%	24%
It's more time efficient than other transportation	28%	29%	29%	28%	24%	30%	28%	29%
None of these	5%	6%	7%	7%	5%	4%	5%	5%
Don't know	6%	3%	5%	6%	9%	4%	7%	4%

3. Which, if any, of the following do you think are reasons people are less likely to buy/ use e-bikes now compared to before the COVID-19 Pandemic?

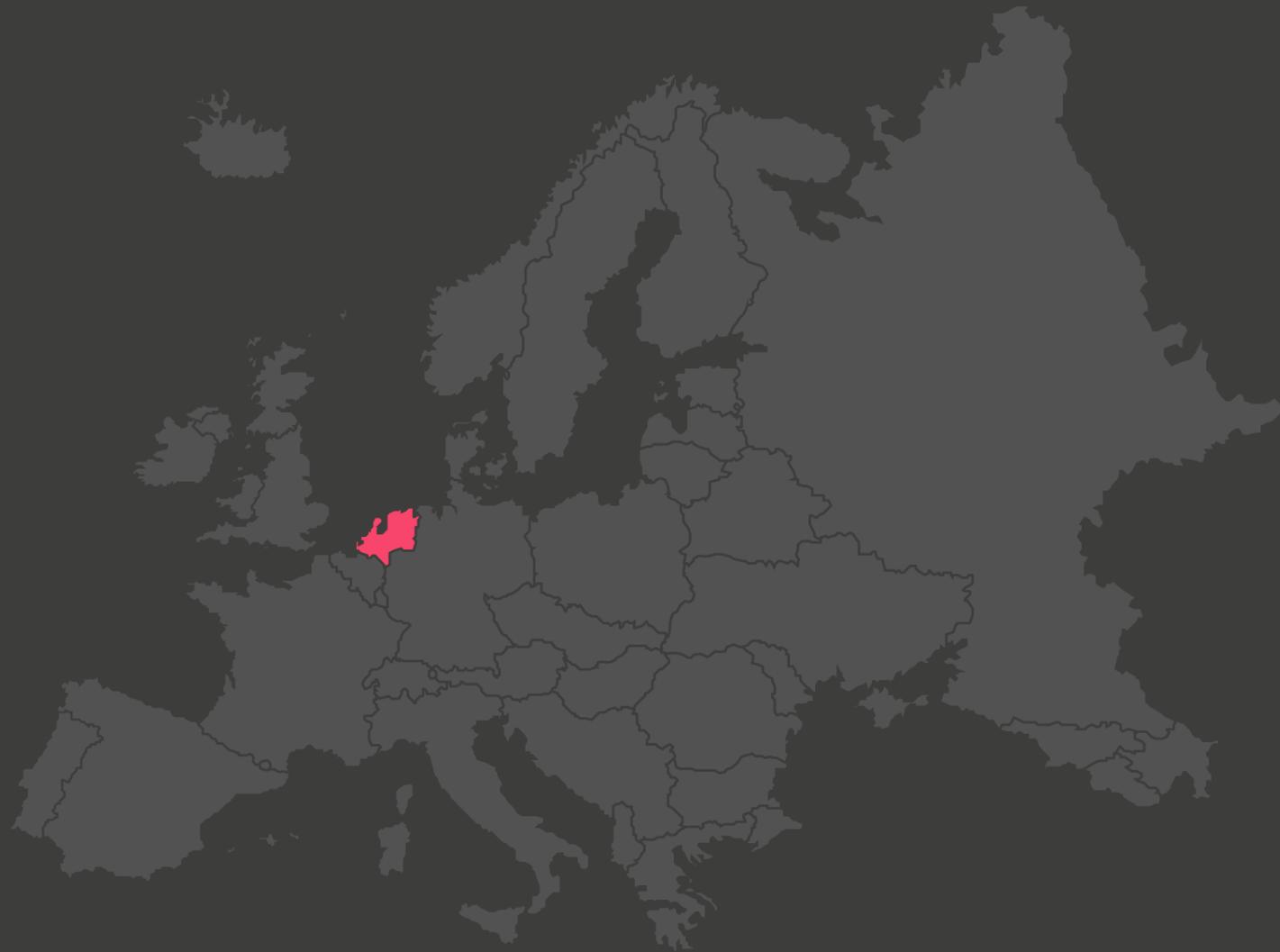
RESPONSE	TOTAL	Age					Gender	
		18-24	25-34	35-44	45-54	55+	Male	Female
Not feeling safe riding one (e.g. a lack of cycling infrastructure in their town or city)	32%	30%	41%	27%	29%	34%	29%	36%
People don't know enough about e-bikes	24%	28%	31%	19%	18%	25%	25%	22%
E-bikes are a cheat compared to using regular bikes (e.g. it is not your own pedal power)	14%	8%	15%	16%	15%	14%	12%	16%
E-bikes are for older people	6%	6%	4%	10%	8%	5%	6%	6%
Their fitness would not improve (e.g. because they would not be pushing themselves enough)	16%	9%	18%	13%	17%	16%	16%	15%
E-bikes are too expensive	57%	55%	54%	52%	54%	61%	58%	56%
None of these	4%	9%	5%	4%	6%	3%	4%	4%
Don't know	9%	8%	8%	9%	12%	9%	10%	8%

4. How likely, if at all, are you to visit a bike shop to get your bike serviced over the next twelve months (i.e. before next June 2022)?

RESPONSE	TOTAL	Age					Gender	
		18-24	25-34	35-44	45-54	55+	Male	Female
Likely	24%	18%	24%	28%	24%	24%	28%	21%
Not Likely	36%	38%	36%	44%	37%	32%	39%	34%
Not applicable - I do not own a bike	32%	36%	31%	20%	30%	37%	27%	36%

5. For the following question, please imagine you are currently considering buying an e-bike at a price you consider reasonable...Which ONE, if any, of the following style of bike would you be most likely to buy?

RESPONSE	TOTAL	Age					Gender	
		18-24	25-34	35-44	45-54	55+	Male	Female
E-Mountain bike	17%	23%	21%	23%	20%	12%	25%	10%
E-Cargo bike	6%	5%	8%	10%	4%	6%	6%	7%
E-Road bike	12%	15%	10%	11%	11%	13%	12%	12%
Trekking e-bike	10%	7%	8%	12%	11%	10%	13%	7%
City e-bike	29%	26%	28%	20%	26%	34%	23%	35%
Folding e-bike	9%	13%	10%	6%	11%	7%	5%	11%
None of these	10%	5%	9%	10%	8%	11%	9%	10%
Don't know	7%	6%	6%	8%	10%	6%	6%	8%



Netherlands

1. How much more likely or unlikely are you to buy or use an e-bike now compared to before the pandemic, or has it remained the same?

RESPONSE	TOTAL	Age					Gender	
		18-24	25-34	35-44	45-54	55+	Male	Female
Likely	33%	28%	29%	36%	30%	36%	34%	32%
Not likely	61%	64%	65%	59%	66%	57%	60%	62%

2. Which, if any, of the following do you think are reasons people are more likely to buy/ use e-bikes now compared to before the COVID-19 Pandemic?

RESPONSE	TOTAL	Age					Gender	
		18-24	25-34	35-44	45-54	55+	Male	Female
To avoid the use of public transport as could catch COVID-19 there	38%	37%	41%	32%	32%	42%	36%	41%
To get daily exercise as part of a routine	45%	46%	44%	41%	36%	50%	43%	47%
As an alternative to using a motor vehicle	35%	23%	34%	33%	34%	40%	37%	34%
To lessen the impact on the environment by reducing their carbon footprint	23%	22%	28%	23%	18%	23%	22%	23%
To improve their general health	34%	31%	27%	31%	32%	39%	33%	34%
It's more time efficient than other transportation	19%	21%	22%	17%	19%	17%	20%	18%
None of these	12%	11%	15%	13%	17%	8%	13%	11%
Don't know	6%	7%	4%	6%	6%	7%	6%	6%

3. Which, if any, of the following do you think are reasons people are less likely to buy/ use e-bikes now compared to before the COVID-19 Pandemic?

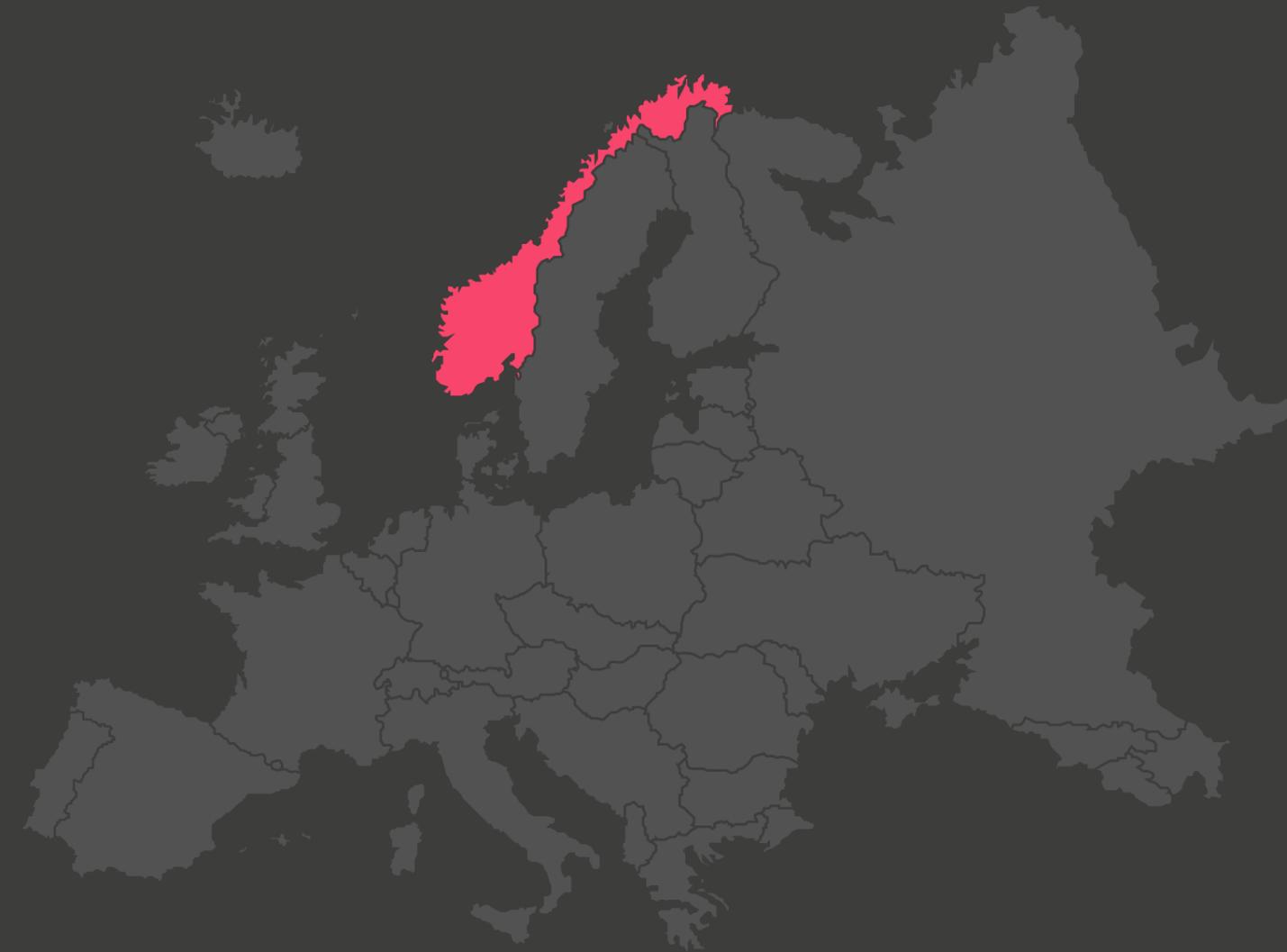
RESPONSE	TOTAL	Age					Gender	
		18-24	25-34	35-44	45-54	55+	Male	Female
Not feeling safe riding one (e.g. a lack of cycling infrastructure in their town or city)	21%	19%	22%	17%	16%	24%	20%	21%
People don't know enough about e-bikes	12%	15%	13%	10%	10%	12%	13%	11%
E-bikes are a cheat compared to using regular bikes (e.g it is not your own pedal power)	13%	19%	17%	16%	11%	10%	16%	11%
E-bikes are for older people	16%	22%	17%	11%	16%	15%	16%	15%
Their fitness would not improve (e.g. because they would not be pushing themselves enough)	18%	32%	21%	19%	17%	14%	19%	17%
E-bikes are too expensive	64%	68%	65%	63%	72%	61%	61%	68%
None of these	8%	1%	8%	7%	7%	10%	9%	7%
Don't know	10%	5%	6%	7%	10%	13%	11%	9%

4. How likely, if at all, are you to visit a bike shop to get your bike serviced over the next twelve months (i.e. before next June 2022)?

RESPONSE	TOTAL	Age					Gender	
		18-24	25-34	35-44	45-54	55+	Male	Female
Likely	40%	26%	34%	42%	34%	48%	41%	40%
Not Likely	41%	51%	47%	44%	44%	33%	41%	40%
Not applicable - I do not own a bike	14%	13%	15%	7%	14%	16%	12%	16%

5. For the following question, please imagine you are currently considering buying an e-bike at a price you consider reasonable...Which ONE, if any, of the following style of bike would you be most likely to buy?

RESPONSE	TOTAL	Age					Gender	
		18-24	25-34	35-44	45-54	55+	Male	Female
E-Mountain bike	6%	13%	8%	10%	5%	2%	9%	3%
E-Cargo bike	8%	14%	23%	10%	5%	1%	7%	9%
E-Road bike	1%	3%	1%	3%	2%	-	2%	1%
Trekking e-bike	18%	17%	12%	14%	17%	22%	20%	16%
City e-bike	45%	36%	42%	42%	40%	51%	39%	50%
Folding e-bike	2%	2%	2%	2%	3%	2%	3%	2%
None of these	15%	11%	9%	13%	20%	16%	14%	16%
Don't know	6%	5%	3%	6%	7%	6%	7%	5%



Norway

1. How much more likely or unlikely are you to buy or use an e-bike now compared to before the pandemic, or has it remained the same?

RESPONSE	TOTAL	Age					Gender	
		18-24	25-34	35-44	45-54	55+	Male	Female
Likely	25%	36%	38%	28%	25%	15%	28%	22%
Not likely	67%	51%	55%	60%	69%	80%	64%	70%

2. Which, if any, of the following do you think are reasons people are more likely to buy/ use e-bikes now compared to before the COVID-19 Pandemic?

RESPONSE	TOTAL	Age					Gender	
		18-24	25-34	35-44	45-54	55+	Male	Female
To avoid the use of public transport as could catch COVID-19 there	42%	30%	47%	48%	48%	39%	39%	46%
To get daily exercise as part of a routine	23%	19%	23%	23%	24%	25%	21%	26%
As an alternative to using a motor vehicle	31%	28%	31%	29%	31%	33%	32%	31%
To lessen the impact on the environment by reducing their carbon footprint	19%	35%	26%	15%	14%	16%	18%	21%
To improve their general health	18%	18%	26%	21%	12%	16%	18%	17%
It's more time efficient than other transportation	24%	27%	31%	21%	28%	19%	24%	24%
None of these	11%	12%	8%	12%	14%	11%	13%	9%
Don't know	17%	10%	9%	17%	15%	24%	16%	18%

3. Which, if any, of the following do you think are reasons people are less likely to buy/ use e-bikes now compared to before the COVID-19 Pandemic?

RESPONSE	TOTAL	Age					Gender	
		18-24	25-34	35-44	45-54	55+	Male	Female
Not feeling safe riding one (e.g. a lack of cycling infrastructure in their town or city)	21%	27%	26%	20%	24%	16%	19%	23%
People don't know enough about e-bikes	13%	14%	15%	13%	9%	14%	13%	13%
E-bikes are a cheat compared to using regular bikes (e.g. it is not your own pedal power)	12%	13%	16%	11%	11%	10%	11%	12%
E-bikes are for older people	4%	11%	5%	5%	3%	2%	5%	3%
Their fitness would not improve (e.g. because they would not be pushing themselves enough)	15%	16%	19%	23%	13%	10%	18%	12%
E-bikes are too expensive	44%	42%	44%	52%	49%	40%	45%	44%
None of these	8%	10%	8%	8%	8%	9%	9%	8%
Don't know	24%	11%	13%	25%	24%	32%	21%	26%

4. How likely, if at all, are you to visit a bike shop to get your bike serviced over the next twelve months (i.e. before next June 2022)?

RESPONSE	TOTAL	Age					Gender	
		18-24	25-34	35-44	45-54	55+	Male	Female
Likely	23%	14%	27%	27%	29%	19%	26%	20%
Not Likely	37%	48%	38%	38%	34%	33%	38%	35%
Not applicable - I do not own a bike	33%	25%	26%	28%	29%	42%	30%	36%

5. For the following question, please imagine you are currently considering buying an e-bike at a price you consider reasonable...Which ONE, if any, of the following style of bike would you be most likely to buy?

RESPONSE	TOTAL	Age					Gender	
		18-24	25-34	35-44	45-54	55+	Male	Female
E-Mountain bike	10%	13%	14%	13%	10%	6%	15%	5%
E-Cargo bike	11%	18%	23%	11%	9%	4%	11%	11%
E-Road bike	3%	8%	7%	1%	2%	0%	4%	1%
Trekking e-bike	11%	7%	11%	11%	11%	11%	12%	9%
City e-bike	21%	27%	17%	22%	22%	21%	18%	25%
Folding e-bike	4%	2%	5%	5%	3%	3%	4%	3%
None of these	23%	12%	14%	21%	25%	32%	21%	26%
Don't know	17%	13%	10%	16%	18%	22%	14%	20%



Poland

1. How much more likely or unlikely are you to buy or use an e-bike now compared to before the pandemic, or has it remained the same?

RESPONSE	TOTAL	Age					Gender	
		18-24	25-34	35-44	45-54	55+	Male	Female
Likely	34%	27%	34%	42%	42%	30%	36%	33%
Not likely	54%	58%	57%	46%	46%	59%	54%	54%

2. Which, if any, of the following do you think are reasons people are more likely to buy/ use e-bikes now compared to before the COVID-19 Pandemic?

RESPONSE	TOTAL	Age					Gender	
		18-24	25-34	35-44	45-54	55+	Male	Female
To avoid the use of public transport as could catch COVID-19 there	37%	27%	38%	30%	34%	42%	30%	42%
To get daily exercise as part of a routine	41%	36%	37%	39%	41%	45%	39%	43%
As an alternative to using a motor vehicle	34%	34%	25%	38%	32%	35%	34%	33%
To lessen the impact on the environment by reducing their carbon footprint	37%	41%	30%	35%	38%	39%	31%	41%
To improve their general health	40%	36%	38%	36%	41%	44%	38%	43%
It's more time efficient than other transportation	20%	18%	23%	16%	25%	19%	16%	23%
None of these	9%	9%	8%	9%	10%	10%	10%	8%
Don't know	10%	8%	10%	12%	10%	10%	11%	10%

3. Which, if any, of the following do you think are reasons people are less likely to buy/ use e-bikes now compared to before the COVID-19 Pandemic?

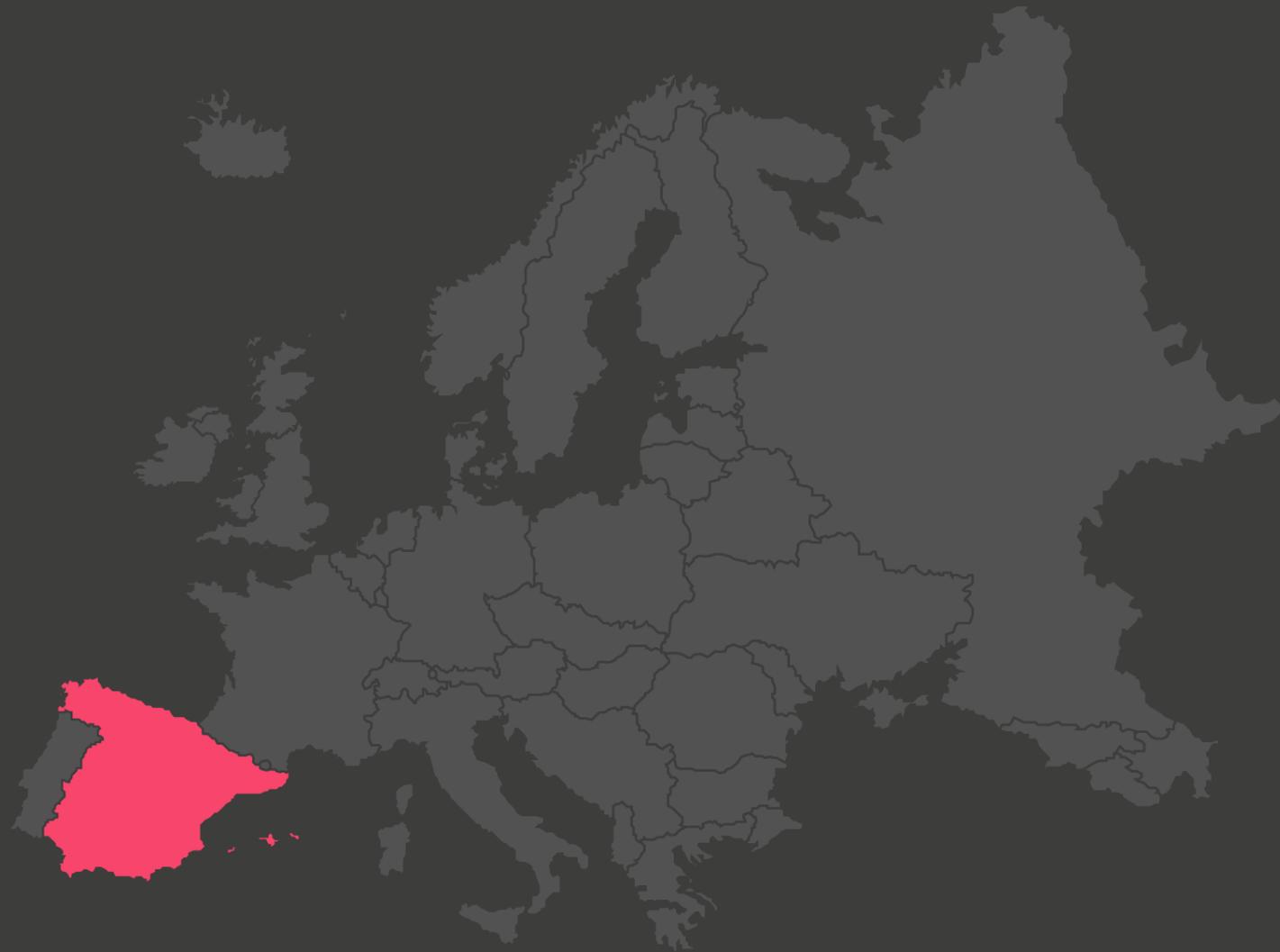
RESPONSE	TOTAL	Age					Gender	
		18-24	25-34	35-44	45-54	55+	Male	Female
Not feeling safe riding one (e.g. a lack of cycling infrastructure in their town or city)	14%	20%	19%	14%	8%	13%	14%	14%
People don't know enough about e-bikes	39%	38%	38%	40%	38%	40%	36%	41%
E-bikes are a cheat compared to using regular bikes (e.g. it is not your own pedal power)	11%	16%	10%	14%	7%	10%	11%	11%
E-bikes are for older people	8%	11%	7%	7%	5%	8%	9%	7%
Their fitness would not improve (e.g. because they would not be pushing themselves enough)	19%	21%	23%	18%	17%	19%	19%	20%
E-bikes are too expensive	46%	44%	45%	45%	46%	47%	49%	43%
None of these	8%	6%	5%	6%	11%	9%	7%	8%
Don't know	13%	6%	15%	13%	12%	14%	12%	14%

4. How likely, if at all, are you to visit a bike shop to get your bike serviced over the next twelve months (i.e. before next June 2022)?

RESPONSE	TOTAL	Age					Gender	
		18-24	25-34	35-44	45-54	55+	Male	Female
Likely	42%	36%	41%	48%	53%	37%	43%	41%
Not Likely	28%	29%	34%	28%	25%	26%	31%	25%
Not applicable - I do not own a bike	21%	26%	20%	15%	15%	26%	18%	24%

5. For the following question, please imagine you are currently considering buying an e-bike at a price you consider reasonable...Which ONE, if any, of the following style of bike would you be most likely to buy?

RESPONSE	TOTAL	Age					Gender	
		18-24	25-34	35-44	45-54	55+	Male	Female
E-Mountain bike	13%	20%	24%	18%	14%	4%	18%	9%
E-Cargo bike	6%	12%	8%	5%	8%	4%	8%	5%
E-Road bike	4%	6%	8%	4%	4%	2%	7%	2%
Trekking e-bike	22%	19%	20%	23%	23%	22%	23%	21%
City e-bike	27%	25%	20%	28%	24%	31%	19%	34%
Folding e-bike	5%	2%	4%	3%	4%	9%	3%	7%
None of these	13%	7%	8%	10%	14%	18%	13%	13%
Don't know	9%	8%	8%	8%	11%	11%	9%	10%



Spain

1. How much more likely or unlikely are you to buy or use an e-bike now compared to before the pandemic, or has it remained the same?

RESPONSE	TOTAL	Age					Gender	
		18-24	25-34	35-44	45-54	55+	Male	Female
Likely	31%	30%	46%	37%	25%	26%	35%	27%
Not likely	66%	69%	53%	61%	69%	70%	62%	69%

2. Which, if any, of the following do you think are reasons people are more likely to buy/ use e-bikes now compared to before the COVID-19 Pandemic?

RESPONSE	TOTAL	Age					Gender	
		18-24	25-34	35-44	45-54	55+	Male	Female
To avoid the use of public transport as could catch COVID-19 there	48%	53%	48%	50%	44%	48%	43%	52%
To get daily exercise as part of a routine	36%	44%	41%	33%	30%	36%	33%	38%
As an alternative to using a motor vehicle	50%	53%	40%	46%	49%	55%	53%	48%
To lessen the impact on the environment by reducing their carbon footprint	35%	48%	35%	33%	30%	36%	36%	35%
To improve their general health	30%	32%	36%	26%	28%	32%	31%	29%
It's more time efficient than other transportation	30%	28%	33%	34%	24%	31%	30%	30%
None of these	3%	2%	3%	3%	5%	2%	4%	2%
Don't know	5%	1%	3%	3%	7%	6%	3%	6%

3. Which, if any, of the following do you think are reasons people are less likely to buy/ use e-bikes now compared to before the COVID-19 Pandemic?

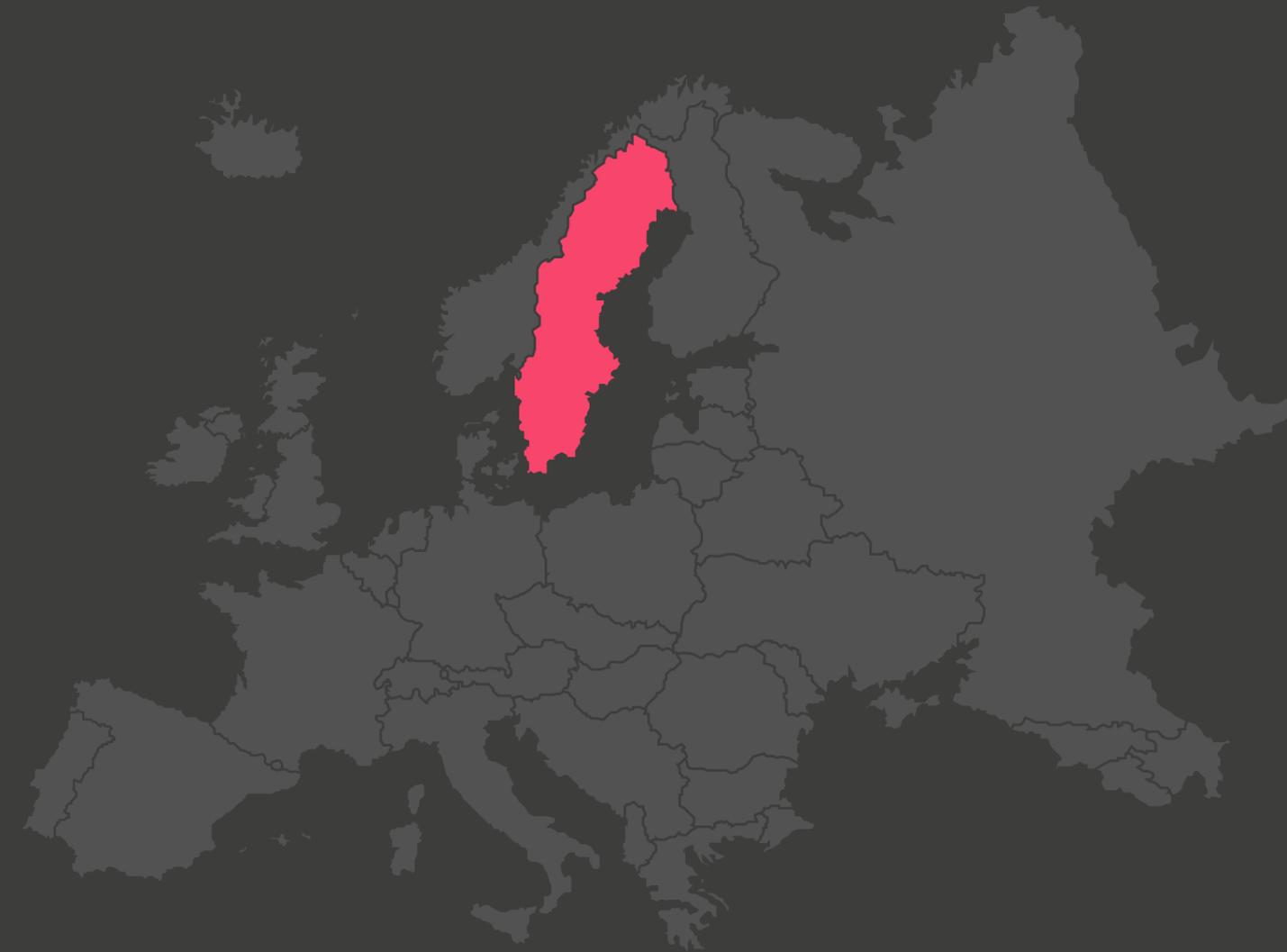
RESPONSE	TOTAL	Age					Gender	
		18-24	25-34	35-44	45-54	55+	Male	Female
Not feeling safe riding one (e.g. a lack of cycling infrastructure in their town or city)	31%	35%	32%	30%	28%	32%	30%	31%
People don't know enough about e-bikes	30%	43%	33%	27%	23%	31%	28%	32%
E-bikes are a cheat compared to using regular bikes (e.g. it is not your own pedal power)	11%	15%	14%	9%	9%	11%	11%	10%
E-bikes are for older people	6%	10%	10%	7%	3%	5%	7%	5%
Their fitness would not improve (e.g. because they would not be pushing themselves enough)	24%	26%	25%	26%	19%	24%	24%	24%
E-bikes are too expensive	59%	53%	62%	61%	62%	57%	62%	56%
None of these	3%	1%	1%	2%	3%	5%	3%	3%
Don't know	6%	5%	2%	3%	10%	6%	3%	8%

4. How likely, if at all, are you to visit a bike shop to get your bike serviced over the next twelve months (i.e. before next June 2022)?

RESPONSE	TOTAL	Age					Gender	
		18-24	25-34	35-44	45-54	55+	Male	Female
Likely	26%	23%	36%	28%	23%	24%	32%	21%
Not Likely	37%	44%	38%	45%	35%	33%	37%	37%
Not applicable - I do not own a bike	33%	26%	24%	26%	35%	40%	28%	38%

5. For the following question, please imagine you are currently considering buying an e-bike at a price you consider reasonable...Which ONE, if any, of the following style of bike would you be most likely to buy?

RESPONSE	TOTAL	Age					Gender	
		18-24	25-34	35-44	45-54	55+	Male	Female
E-Mountain bike	17%	13%	24%	22%	25%	10%	27%	8%
E-Cargo bike	7%	13%	10%	9%	5%	6%	8%	7%
E-Road bike	6%	9%	10%	10%	2%	5%	7%	6%
Trekking e-bike	8%	9%	10%	5%	7%	10%	8%	9%
City e-bike	30%	33%	23%	25%	30%	35%	25%	35%
Folding e-bike	14%	8%	16%	17%	13%	13%	13%	15%
None of these	11%	7%	5%	12%	11%	13%	9%	12%
Don't know	6%	8%	3%	1%	7%	8%	4%	8%



Sweden

1. How much more likely or unlikely are you to buy or use an e-bike now compared to before the pandemic, or has it remained the same?

RESPONSE	TOTAL	Age					Gender	
		18-24	25-34	35-44	45-54	55+	Male	Female
Likely	25%	50%	39%	27%	20%	13%	26%	23%
Not likely	70%	39%	53%	66%	73%	85%	68%	71%

2. Which, if any, of the following do you think are reasons people are more likely to buy/ use e-bikes now compared to before the COVID-19 Pandemic?

RESPONSE	TOTAL	Age					Gender	
		18-24	25-34	35-44	45-54	55+	Male	Female
To avoid the use of public transport as could catch COVID-19 there	47%	37%	42%	55%	49%	47%	42%	52%
To get daily exercise as part of a routine	22%	24%	23%	25%	21%	20%	19%	24%
As an alternative to using a motor vehicle	39%	24%	37%	39%	38%	43%	35%	42%
To lessen the impact on the environment by reducing their carbon footprint	25%	32%	29%	23%	24%	22%	23%	27%
To improve their general health	19%	25%	22%	23%	17%	15%	16%	21%
It's more time efficient than other transportation	22%	28%	23%	26%	20%	19%	21%	22%
None of these	10%	6%	10%	8%	13%	10%	13%	7%
Don't know	11%	11%	12%	10%	8%	13%	12%	11%

3. Which, if any, of the following do you think are reasons people are less likely to buy/ use e-bikes now compared to before the COVID-19 Pandemic?

RESPONSE	TOTAL	Age					Gender	
		18-24	25-34	35-44	45-54	55+	Male	Female
Not feeling safe riding one (e.g. a lack of cycling infrastructure in their town or city)	19%	33%	19%	20%	15%	16%	18%	19%
People don't know enough about e-bikes	15%	25%	11%	13%	14%	15%	13%	16%
E-bikes are a cheat compared to using regular bikes (e.g. it is not your own pedal power)	14%	22%	14%	17%	13%	12%	16%	12%
E-bikes are for older people	4%	10%	4%	4%	1%	3%	5%	3%
Their fitness would not improve (e.g. because they would not be pushing themselves enough)	17%	21%	15%	19%	19%	15%	20%	14%
E-bikes are too expensive	52%	47%	44%	53%	60%	53%	47%	57%
None of these	8%	3%	8%	8%	10%	8%	9%	7%
Don't know	19%	14%	20%	18%	13%	22%	18%	20%

4. How likely, if at all, are you to visit a bike shop to get your bike serviced over the next twelve months (i.e. before next June 2022)?

RESPONSE	TOTAL	Age					Gender	
		18-24	25-34	35-44	45-54	55+	Male	Female
Likely	25%	30%	29%	28%	24%	22%	25%	25%
Not Likely	47%	45%	44%	44%	50%	48%	48%	45%
Not applicable - I do not own a bike	21%	14%	17%	21%	18%	26%	18%	24%

5. For the following question, please imagine you are currently considering buying an e-bike at a price you consider reasonable...Which ONE, if any, of the following style of bike would you be most likely to buy?

RESPONSE	TOTAL	Age					Gender	
		18-24	25-34	35-44	45-54	55+	Male	Female
E-Mountain bike	6%	10%	7%	4%	11%	3%	8%	4%
E-Cargo bike	11%	19%	16%	14%	8%	6%	11%	10%
E-Road bike	9%	14%	12%	10%	10%	7%	10%	9%
Trekking e-bike	9%	11%	6%	8%	10%	9%	10%	8%
City e-bike	27%	17%	26%	31%	29%	27%	22%	31%
Folding e-bike	5%	5%	4%	5%	3%	5%	4%	5%
None of these	23%	13%	13%	17%	23%	32%	24%	22%
Don't know	11%	11%	15%	11%	8%	10%	11%	11%



Switzerland

1. How much more likely or unlikely are you to buy or use an e-bike now compared to before the pandemic, or has it remained the same?

RESPONSE	TOTAL	Age					Gender	
		18-24	25-34	35-44	45-54	55+	Male	Female
Likely	30%	21%	32%	36%	39%	26%	34%	27%
Not likely	64%	74%	64%	56%	56%	70%	61%	67%

2. Which, if any, of the following do you think are reasons people are more likely to buy/ use e-bikes now compared to before the COVID-19 Pandemic?

RESPONSE	TOTAL	Age					Gender	
		18-24	25-34	35-44	45-54	55+	Male	Female
To avoid the use of public transport as could catch COVID-19 there	36%	38%	36%	44%	35%	32%	29%	43%
To get daily exercise as part of a routine	35%	43%	32%	35%	37%	33%	29%	40%
As an alternative to using a motor vehicle	36%	35%	32%	31%	39%	39%	35%	37%
To lessen the impact on the environment by reducing their carbon footprint	33%	44%	29%	36%	36%	30%	29%	38%
To improve their general health	36%	41%	36%	35%	39%	34%	30%	41%
It's more time efficient than other transportation	24%	26%	24%	22%	26%	22%	25%	22%
None of these	13%	13%	17%	9%	10%	15%	16%	11%
Don't know	7%	5%	6%	9%	7%	7%	8%	6%

3. Which, if any, of the following do you think are reasons people are less likely to buy/ use e-bikes now compared to before the COVID-19 Pandemic?

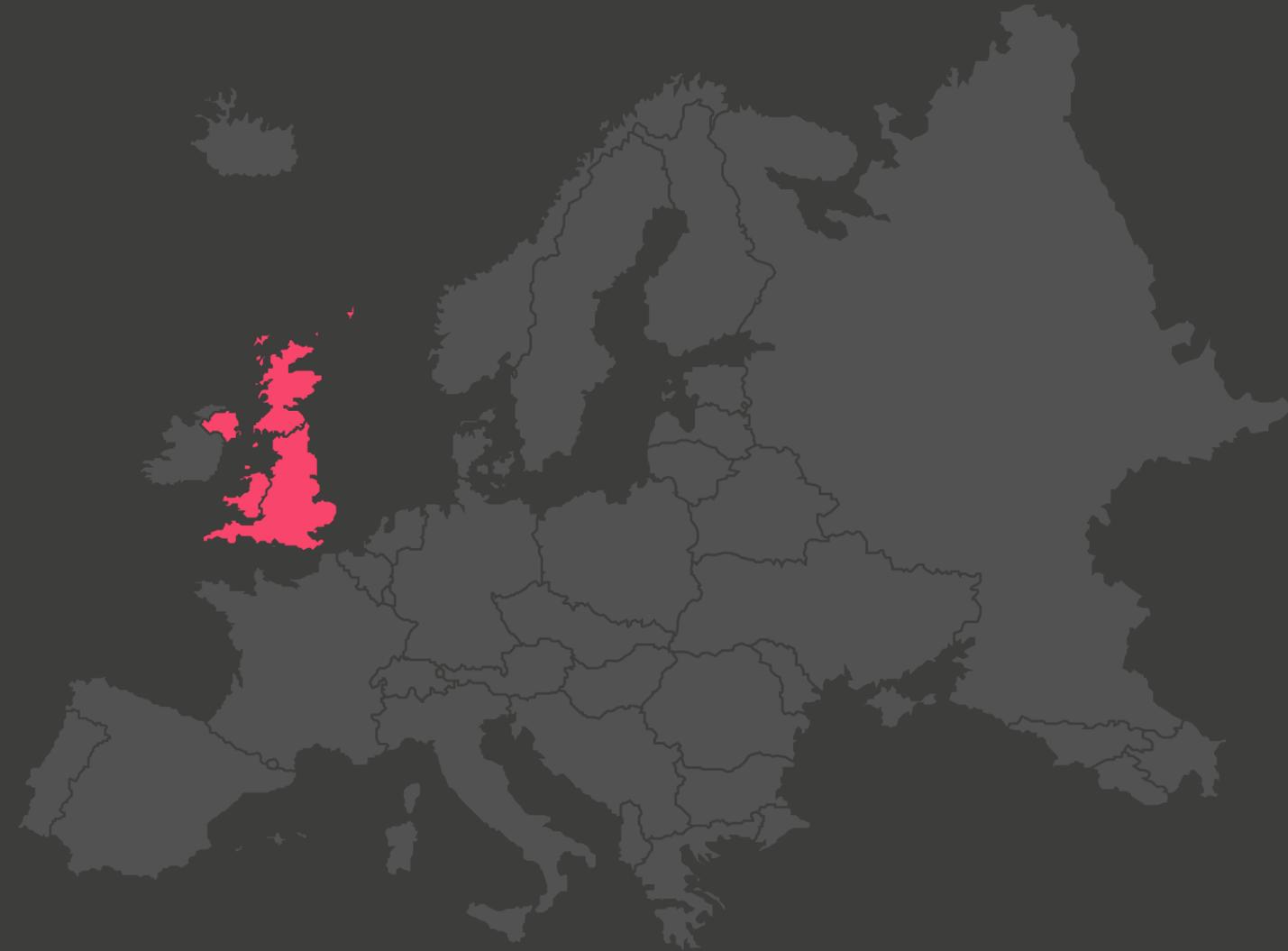
RESPONSE	TOTAL	Age					Gender	
		18-24	25-34	35-44	45-54	55+	Male	Female
Not feeling safe riding one (e.g. a lack of cycling infrastructure in their town or city)	24%	24%	26%	24%	19%	25%	21%	26%
People don't know enough about e-bikes	17%	15%	18%	13%	16%	19%	17%	17%
E-bikes are a cheat compared to using regular bikes (e.g. it is not your own pedal power)	13%	23%	16%	13%	11%	9%	12%	13%
E-bikes are for older people	8%	11%	8%	9%	8%	6%	8%	8%
Their fitness would not improve (e.g. because they would not be pushing themselves enough)	17%	25%	16%	16%	16%	16%	18%	16%
E-bikes are too expensive	59%	60%	63%	61%	63%	55%	58%	60%
None of these	11%	6%	7%	10%	11%	15%	13%	10%
Don't know	10%	9%	12%	9%	8%	11%	10%	9%

4. How likely, if at all, are you to visit a bike shop to get your bike serviced over the next twelve months (i.e. before next June 2022)?

RESPONSE	TOTAL	Age					Gender	
		18-24	25-34	35-44	45-54	55+	Male	Female
Likely	29%	26%	27%	31%	35%	25%	30%	27%
Not Likely	33%	41%	37%	39%	35%	27%	35%	32%
Not applicable - I do not own a bike	33%	29%	29%	22%	24%	44%	30%	35%

5. For the following question, please imagine you are currently considering buying an e-bike at a price you consider reasonable...Which ONE, if any, of the following style of bike would you be most likely to buy?

RESPONSE	TOTAL	Age					Gender	
		18-24	25-34	35-44	45-54	55+	Male	Female
E-Mountain bike	17%	24%	24%	26%	16%	9%	23%	12%
E-Cargo bike	5%	9%	6%	6%	7%	4%	5%	6%
E-Road bike	5%	6%	6%	5%	5%	4%	6%	4%
Trekking e-bike	19%	14%	21%	19%	25%	17%	18%	20%
City e-bike	27%	27%	17%	23%	27%	32%	23%	30%
Folding e-bike	4%	5%	5%	2%	3%	4%	3%	4%
None of these	18%	11%	17%	12%	11%	25%	18%	17%
Don't know	5%	4%	4%	6%	6%	6%	4%	7%



United Kingdom

1. How much more likely or unlikely are you to buy or use an e-bike now compared to before the pandemic, or has it remained the same?

RESPONSE	TOTAL	Age					Gender	
		18-24	25-34	35-44	45-54	55+	Male	Female
Likely	10%	9%	17%	12%	9%	8%	11%	10%
Not likely	83%	80%	70%	80%	86%	88%	81%	84%

2. Which, if any, of the following do you think are reasons people are more likely to buy/ use e-bikes now compared to before the COVID-19 Pandemic?

RESPONSE	TOTAL	Age					Gender	
		18-24	25-34	35-44	45-54	55+	Male	Female
To avoid the use of public transport as could catch COVID-19 there	38%	33%	36%	39%	42%	38%	32%	44%
To get daily exercise as part of a routine	33%	36%	33%	32%	32%	32%	28%	38%
As an alternative to using a motor vehicle	40%	39%	38%	40%	38%	41%	37%	42%
To lessen the impact on the environment by reducing their carbon footprint	37%	40%	37%	42%	34%	36%	32%	42%
To improve their general health	32%	36%	34%	33%	31%	31%	28%	36%
It's more time efficient than other transportation	20%	30%	22%	21%	17%	18%	20%	21%
None of these	14%	10%	13%	14%	13%	15%	17%	11%
Don't know	18%	18%	19%	17%	18%	17%	20%	16%

3. Which, if any, of the following do you think are reasons people are less likely to buy/ use e-bikes now compared to before the COVID-19 Pandemic?

RESPONSE	TOTAL	Age					Gender	
		18-24	25-34	35-44	45-54	55+	Male	Female
Not feeling safe riding one (e.g. a lack of cycling infrastructure in their town or city)	41%	49%	35%	35%	39%	45%	37%	45%
People don't know enough about e-bikes	26%	26%	25%	28%	22%	27%	23%	29%
E-bikes are a cheat compared to using regular bikes (e.g. it is not your own pedal power)	15%	18%	16%	13%	15%	14%	17%	13%
E-bikes are for older people	4%	10%	5%	4%	3%	3%	5%	4%
Their fitness would not improve (e.g. because they would not be pushing themselves enough)	17%	21%	17%	14%	12%	20%	19%	16%
E-bikes are too expensive	49%	52%	52%	49%	47%	47%	47%	50%
None of these	9%	6%	8%	8%	10%	9%	10%	7%
Don't know	20%	17%	19%	24%	21%	18%	21%	19%

4. How likely, if at all, are you to visit a bike shop to get your bike serviced over the next twelve months (i.e. before next June 2022)?

RESPONSE	TOTAL	Age					Gender	
		18-24	25-34	35-44	45-54	55+	Male	Female
Likely	11%	9%	13%	15%	13%	7%	13%	8%
Not Likely	34%	39%	30%	34%	37%	34%	37%	32%
Not applicable - I do not own a bike	51%	46%	50%	45%	45%	57%	45%	56%

5. For the following question, please imagine you are currently considering buying an e-bike at a price you consider reasonable...Which ONE, if any, of the following style of bike would you be most likely to buy?

RESPONSE	TOTAL	Age					Gender	
		18-24	25-34	35-44	45-54	55+	Male	Female
E-Mountain bike	9%	7%	13%	12%	12%	6%	12%	6%
E-Cargo bike	5%	6%	6%	5%	6%	5%	5%	5%
E-Road bike	5%	11%	5%	5%	4%	4%	6%	4%
Trekking e-bike	9%	5%	9%	10%	10%	9%	9%	9%
City e-bike	15%	16%	17%	10%	14%	17%	13%	17%
Folding e-bike	7%	6%	8%	6%	5%	9%	6%	9%
None of these	34%	32%	27%	35%	35%	38%	35%	34%
Don't know	15%	17%	15%	18%	14%	13%	13%	16%

SHIMANO

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