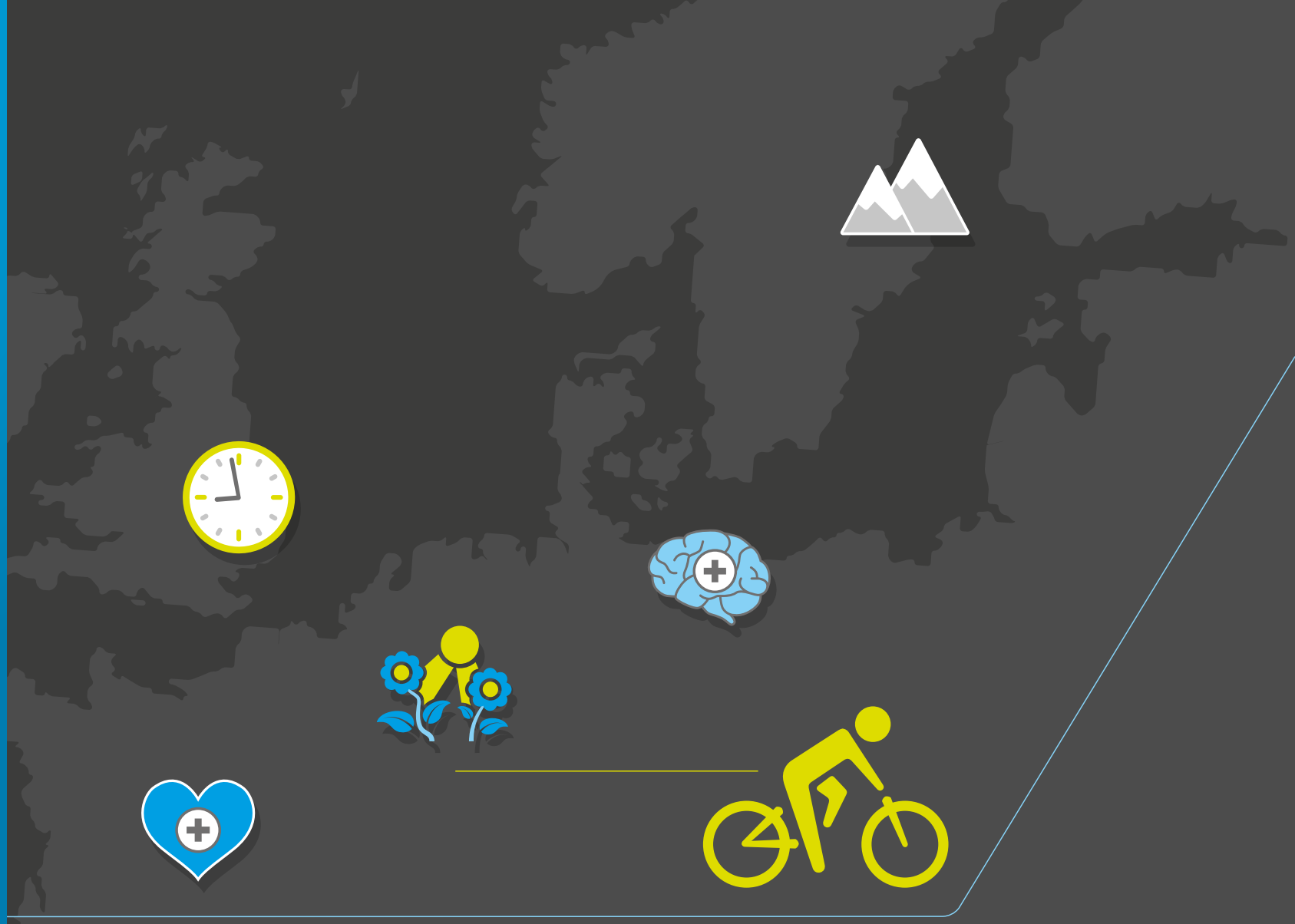
SHIMANO STEPS



STATE OF THE NATION REPORT

Examining attitudes towards e-bike usage in 11 European countries

Introduction

Welcome to the second of Shimano's State of the Nation reports. This report has been commissioned to look at the place e-bikes have in our societies.

We know that the e-bike market is growing rapidly - certain European countries show growth rates around 35% year on year, totalling some 2.5m+ e-bike sales in Europe (2018 figure, CONEBI) which, in some countries, accounts for half of their annual bike sales - but we know less about the motivations of consumers and why they differ per country. The aim of the report is to examine those motivations - the similarities and the differences - and see why some consumers are rapidly adopting e-bikes whilst others have been slower to get going.

Specifically we're looking at 11 European countries - the United Kingdom, the Netherlands, Germany, Switzerland, France, Spain, Italy, Denmark, Sweden, Norway and Poland. These countries are either mature or up-and-coming in terms of e-bike growth and therefore provide interesting case studies.

Our first report was conducted together with YouGov in 2019. At the time it was the largest e-bike consumer survey ever conducted. 2020's report has now raised that bar. We envisaged this report would be a direct comparison but of course 2020 looks very different to 2019 so year on year comparisons need to be considered within the ramifications of Covid-19 and the way its ongoing legacy is shaping our thoughts and opinions.

Even so the 2020 YouGov survey of more than 13,000 European respondents tells us some very interesting findings.

We also asked social commentators and members of the bicycle industry for their views on the findings. Their general observation is that e-bikes are enabling more and more people to get around in a more efficient way - both in terms of time, or cost - but to get started takes some decision making on an emotional level. Pull factors need to be attractive but push factors are equally if not more important in behaviour changes.

In the following pages you'll find some surprising statistics and compelling opinions. Essential reading for anyone interested in bicycle technology, transport and the future of livable cities, we hope.

Contents

European Overview

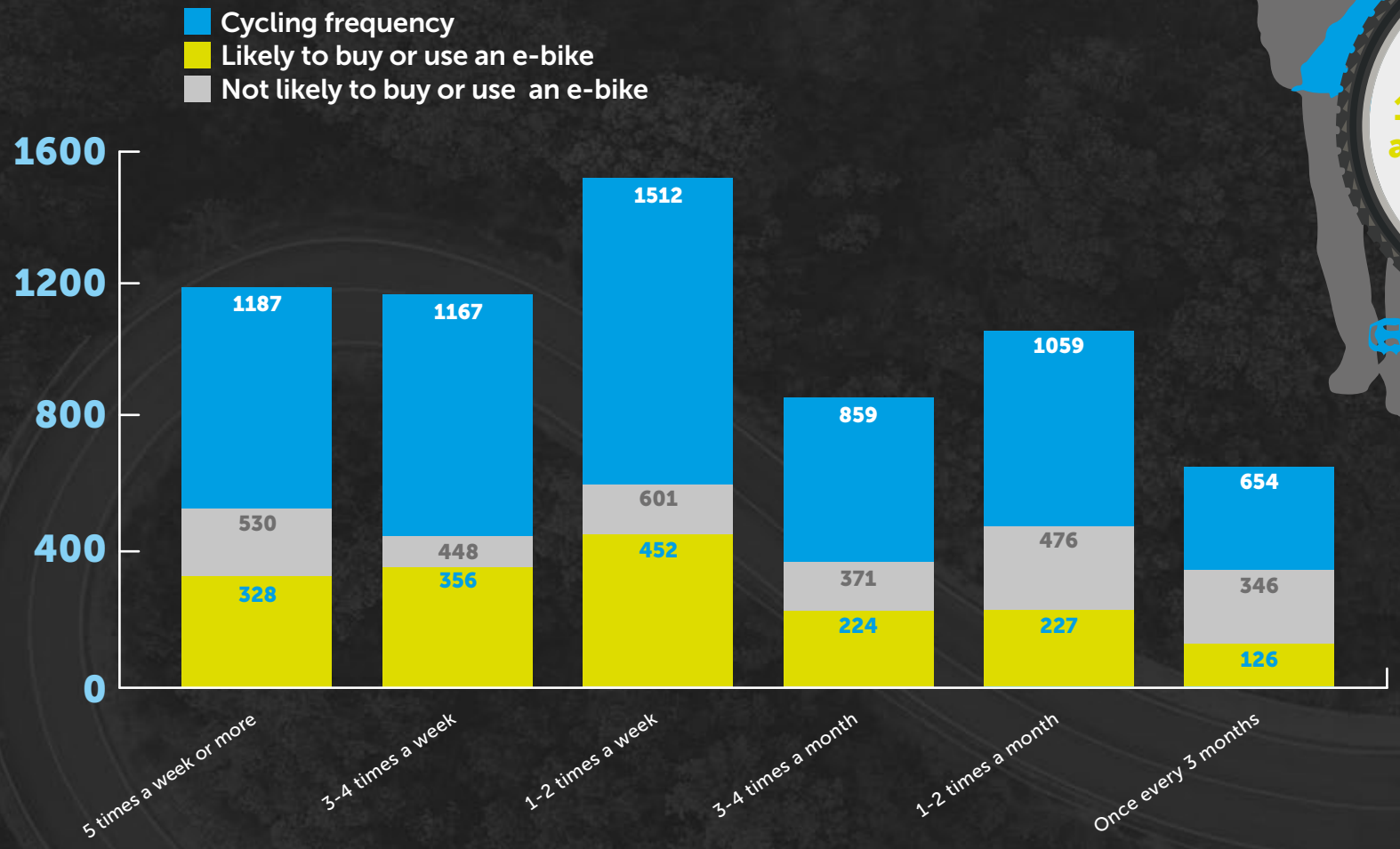
Gathering the opinions of respondents from eleven countries this survey, the largest European e-bike study to date, has helped to reveal the barriers and motivations for e-bike use.

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. Further on we look at the data in more detail.

All figures, unless otherwise stated, are from YouGov Plc. Total sample size was 13,412 adults in the Netherland, Italy, Denmark, France, Sweden, Germany, UK, Switzerland, Norway, Spain and Poland. Fieldwork was undertaken between 30th March - 29th April 2020. The survey was carried out online. The figures have been given an even weighting for each country to produce an 'average' value.

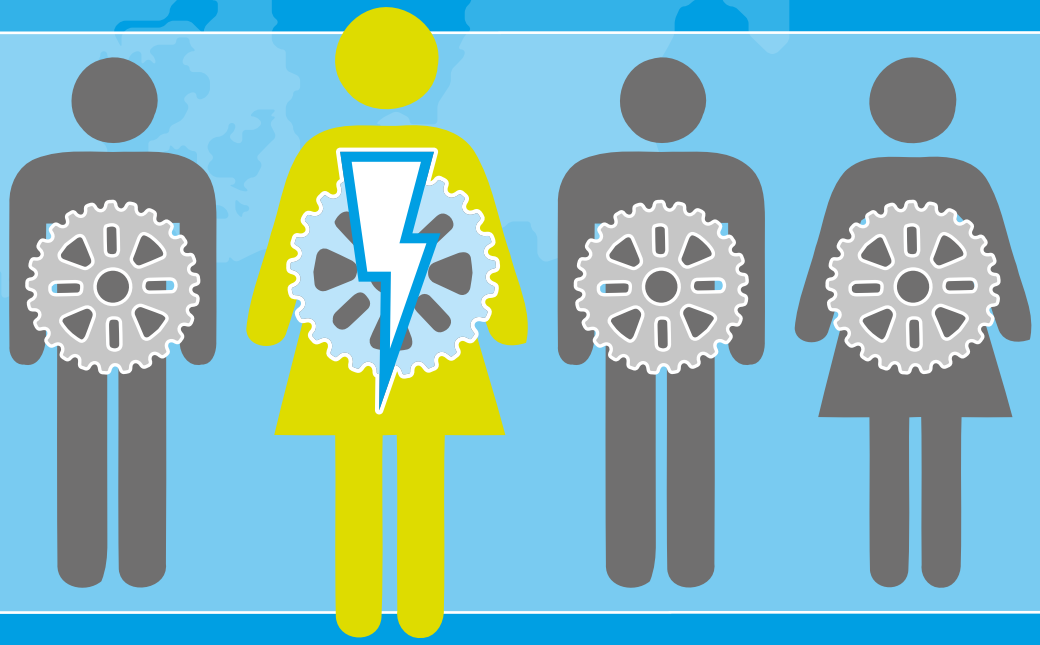
How often do Europeans cycle?

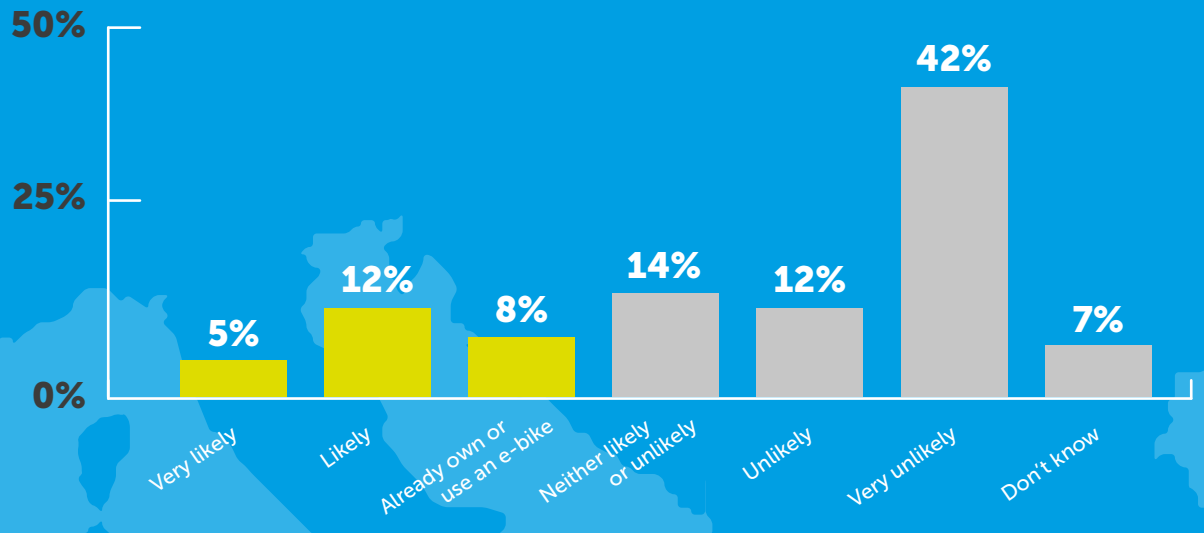


Q1: Approximately, how often, if at all, have you ridden any type of bicycle in the past year (i.e. since March 2019)?

How likely are Europeans to buy or use e-bikes?

One in four Europeans either already owns an e-bike or is likely to buy one this year

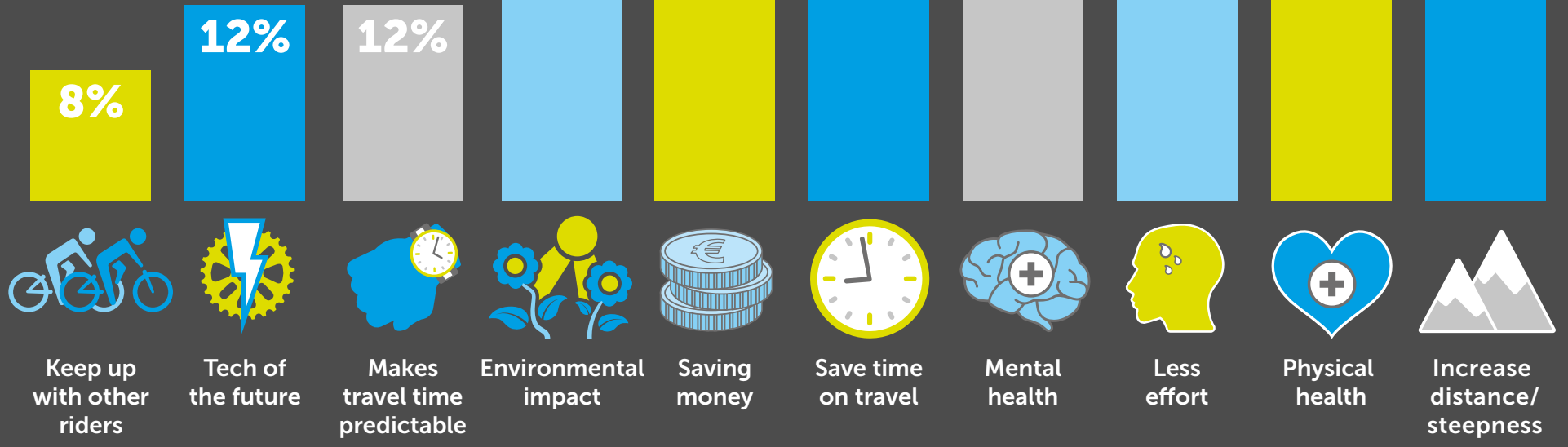




Q2: How likely, if at all, are you to buy or use (e.g. loan,hire, rent, etc.) an e-bike than you would have been 12 months ago (e.g. since last March 2019)?

Reasons for buying an e-bike

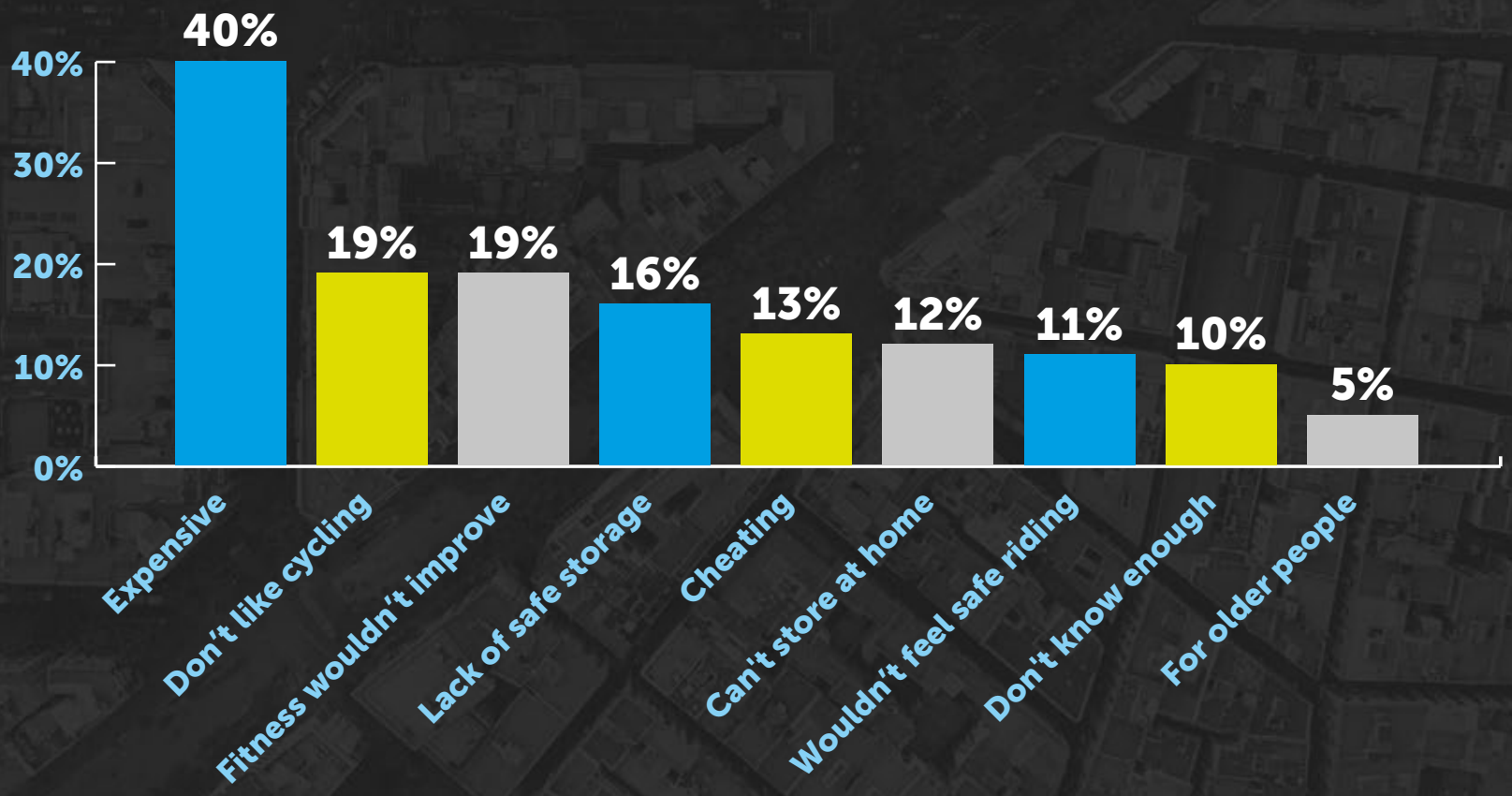
Increasing the distance travelled is the main reason for buying an e-bike, with one in three wanting to go further



Q3: Triggers to buying an e-bike - which of the following would make you want to buy an e-bike?

Barriers to buying an e-bike

Two in five say e-bikes are too expensive



Q4: Barriers to buying an e-bike - which of the following would be a reason NOT to buy an e-bike?

Reasons for buying an e-bike

The majority say they would use an e-bike for leisure or family activities, hinting that an e-bike's appeal isn't limited to commuting (although over a quarter would commute on their e-bike)

31%

For leisure / family cycling

28%

For travel / commuting

16%

For sport / fitness

11%

Carrying heavy loads (groceries, children)

Q5: Reason for buying an e-bike - what would be a main purpose for buying or using an e-bike?

All European Trends

Number one trigger for buying an e-bike

Norway

Percent likely to buy or use an e-bike in next 12 months **13%**

Number one trigger for buying an e-bike:
Increase distance/steepness

Netherlands

Percent likely to buy or use an e-bike in next 12 months **26%**

Number one trigger for buying an e-bike:
Physical health

United Kingdom

Percent likely to buy or use an e-bike in next 12 months **7%**

Number one trigger for buying an e-bike:
Physical health

France

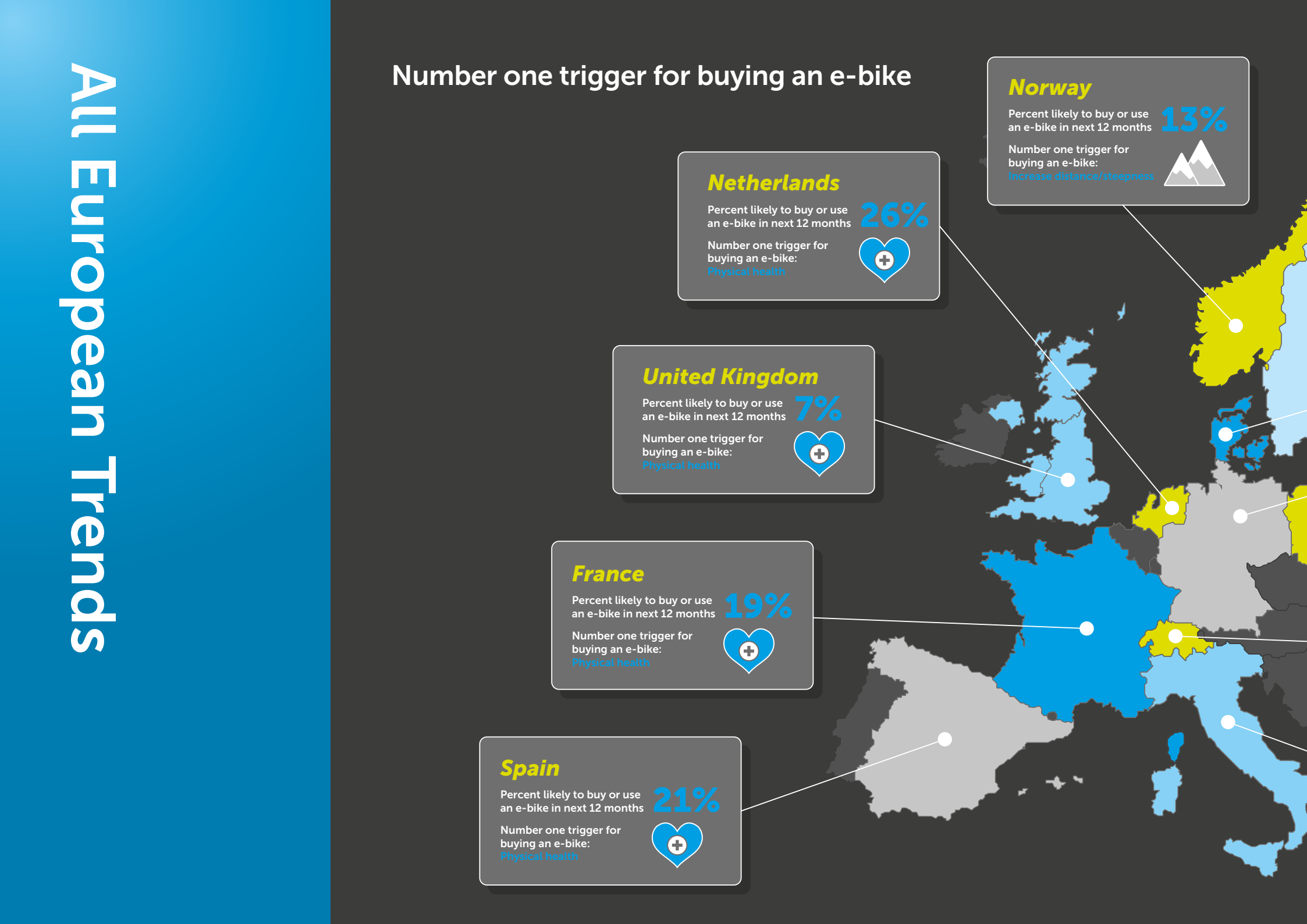
Percent likely to buy or use an e-bike in next 12 months **19%**

Number one trigger for buying an e-bike:
Physical health

Spain

Percent likely to buy or use an e-bike in next 12 months **21%**

Number one trigger for buying an e-bike:
Physical health



Sweden

Percent likely to buy or use an e-bike in next 12 months **11%**

Number one trigger for buying an e-bike:
Increase distance/steepness

Denmark

Percent likely to buy or use an e-bike in next 12 months **11%**

Number one trigger for buying an e-bike:
Increase distance/steepness

Germany

Percent likely to buy or use an e-bike in next 12 months **10%**

Number one trigger for buying an e-bike:
Increase distance/steepness

Poland

Percent likely to buy or use an e-bike in next 12 months **26%**

Number one trigger for buying an e-bike:
Less effort

Switzerland

Percent likely to buy or use an e-bike in next 12 months **26%**

Number one trigger for buying an e-bike:
Physical health

Italy

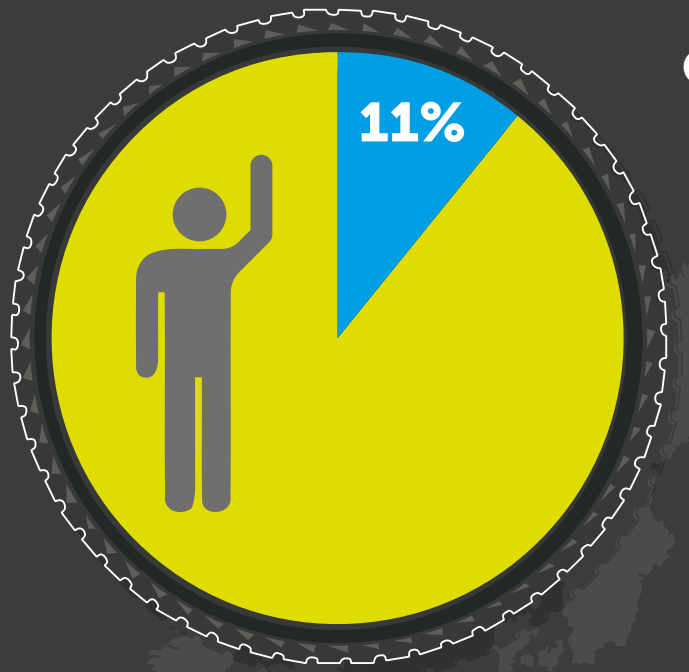
Percent likely to buy or use an e-bike in next 12 months **30%**

Number one trigger for buying an e-bike:
Less effort

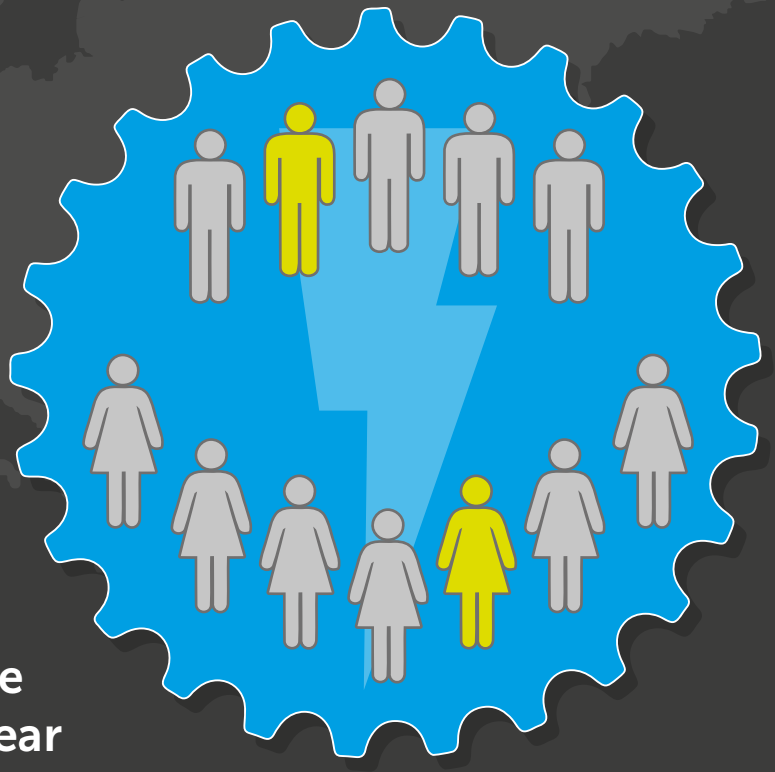
Number one barrier to buying an e-bike

Cost is unanimously the number one barrier to e-bike purchase for every European country, but that doesn't tell the full story. In countries where e-bikes are frequently used for sports and leisure cost is a less significant barrier than in countries where e-bikes are mainly used for transport and commuting.

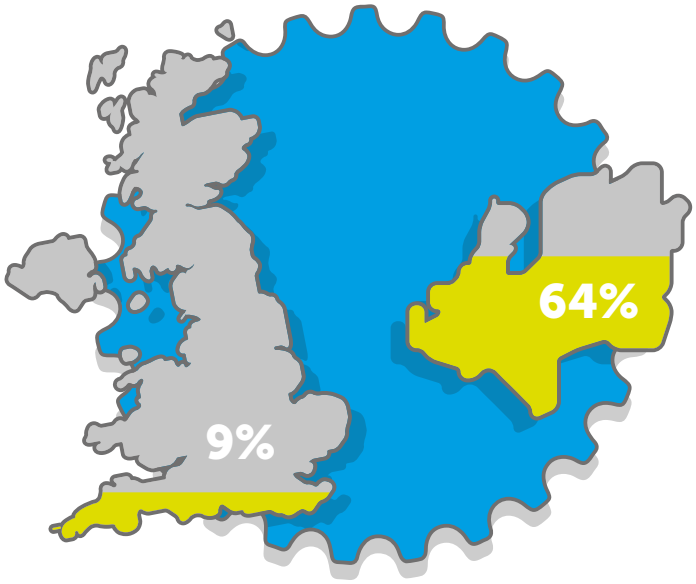
All Industry Trends



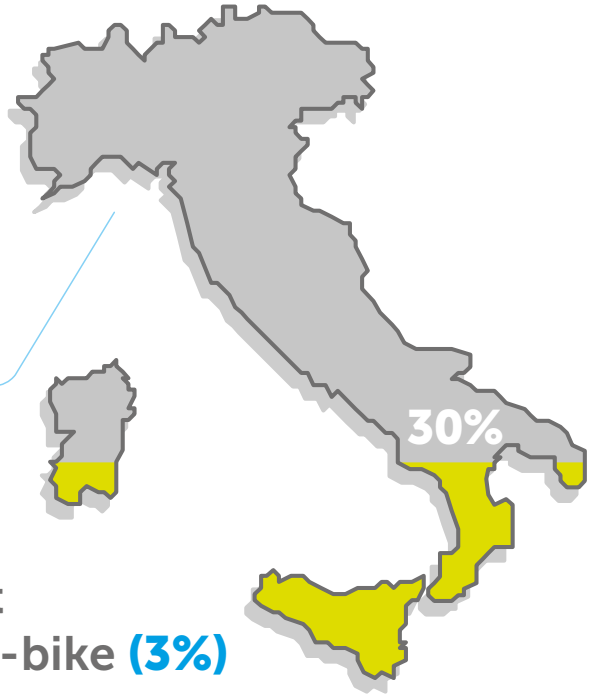
Of those Europeans who currently don't cycle **11%** say they are likely to buy or use an e-bike in the next year



One in five men and **one in seven** women are likely to use an e-bike in the next year



The Netherlands has the highest percentage of people who cycle at least once a week **(64%)** and the UK has the lowest **(9%)**



Italy has the highest number of people who are likely to buy or use an e- bike this year **(30%)**, but also the lowest amount of people who currently own an e-bike **(3%)**

1 Attitudes

Across Europe there are clear trends in attitudes towards e-bikes, younger people are more likely to use e-bikes for practical purposes, whereas older people are more interested in leisure.

Personal benefit was consistently more important than environmental impact regard-less of nationality, age or gender with increasing the distance or steepness the user can travel the main trigger for e-bike use.

However, the reasons for and against e-bike use can also be conflicting. Among those 18-24 year olds likely to buy an e-bike the main reason is that they make cycling less effort, but for those not likely to buy an e-bike the main reason is that they think e-biking is cheating. For some the e-bike's chief benefit is also its barrier.

European men and women share the same reasons for using an e-bike

- 31% Increase distance/steepness
- 30% Less effort
- 29% Physical Health
- 21% Mental Health
- 20% Save time on travel

- Increase distance/steepness 33%
- Less effort 31%
- Physical Health 31%
- Mental Health 22%
- Save time on travel 22%

But their reasons for not using one are different:

Male
- 42% Expensive
- 21% Fitness wouldn't improve
- 17% Lack of safe storage at home/work
- 16% Don’t like cycling
- 15% Cheating

Female
- 39% Expensive
- 21% Don’t like cycling
- 17% Fitness wouldn't improve
- 16% Lack of safe storage at home/work
- 12% Can't store at home

1 Attitudes

35-44 year olds are most likely to buy or use an e-bike

29% of young adults **(18-24)** say they would use an e-bike to make cycling less effort

37% of older respondents **(55+)** think an e-bike would improve their physical health

Ian Walker

Senior Lecturer in Psychology at the University of Bath

Ian Walker is an environmental psychologist who works on a range of sustainable behaviours including transport choices, energy use and water consumption. Ian focuses particularly on the causes of behaviour that people tend to be unaware of, such as habits and social norms. As well as having a long-standing research interest in cycling, Ian is also a serious ultradistance cyclist, he holds the Guinness World Record for the fastest bicycle ride across Europe.

It is interesting to see what makes e-bikes intriguing to people who currently do not use them. Thirty-nine percent of respondents said they primarily saw an e-bike being used for practical purposes and 47% said they primarily saw it as being for sport or leisure. While a substantial number of people were drawn to e-bikes for physical or mental health benefits, others were drawn to e-bikes because they permit users to get around quickly, with much less effort than a regular bicycle. As e-bikes can easily fulfil both these roles, understanding the motivations for each potential customer is key to promoting the most appealing benefits. That cost was the main barrier to wider uptake of e-bikes tells us that government subsidies might be a simple and effective mechanism for getting more people using them. It would be a very different picture if the main barriers found in this survey were more difficult to control.

Although women were more likely than men to say they don't cycle at the moment, there were no real gender differences in appetite for e-bikes in the future, or motives for wanting one. That e-bikes appeal to women more than normal bikes is particularly interesting, in the light of previous research. Road-danger is often high-lighted as a key barrier to getting more women cycling, but the equal appeal of e-bikes between the genders suggests this cannot be the whole story. Potentially, difficulty or perceived effort, could be deterring some women from cycling. That the people of Europe did not see e-bikes as being for older people is encouraging, and shows that e-bikes appeal to a broad range of users.

Given the substantial number of people in this survey who are curious about e-bikes for commuting, or for carrying shopping and children, it could be particularly valuable to look at how many households might be able to use an e-bike not just for the occasional journey, but to replace a second car entirely. A key emerging market might be people who have traditionally commuted by public transport as an e-bike can offer ease and convenience for daily journeys without close proximity with other people.

"a lot of respondents are interested in e-bikes for practical purposes, a key emerging market might be people who have traditionally commuted by public transport"

1 Attitudes

Marco te Brömmelstroet

Professor Dr. in Urban Mobility Futures, University of Amsterdam

Prof. Marco te Brömmelstroet is a full Professor of Urban Mobility Futures at the University of Amsterdam and the founding academic director of the Urban Cycling Institute that is a part of the Centre for Urban Studies. The Institute leads research into the reciprocal relations between cycling, society and cities and is also actively involved in international dissemination of Dutch cycling knowledge. Marco's research focus is to advance social-scientific methodology to foster a more constructive-critical approach in the early stages of mobility innovations. His teaching centres on the integration between land use development and mobility behaviour.

Central in the e-bike discussion in The Netherlands is the relation it has with the already massive culture of cycling. While an e-bike has obvious advantages over car travel, it could be argued that a regular bike has even greater advantages in terms of sustainability, health, inclusivity and accessibility, however 11% of the potential e-bike users say they currently never use a normal bike. This could explain the high score for seeing fitness as a barrier (and not safety) and the high score on seeing the e-bike as a 'range-extender' suggesting users see the potential of an e-bike to replace car journeys (also replicating earlier findings in Jones et al., 2016; Plazier et al., 2017). When we can use e-bikes to get people to cycle more often, more distance than they used to, it has clear benefits over for instance driving a car. Ideally, such an modal shift should be used to also get people to consider a regular bike, for which most of these advantages are even stronger.

Remarkably, safety seems a low barrier throughout the entire sample although we know this is an important barrier for cycling in general. I think safety is a complex issue to be asked in one single question. It could relate to the safety of others, and/or compared to driving a car. This needs to be unpacked much more. For example, in the Netherlands, cyclists do not have to merge with car traffic, in this instance an e-bike makes it less safe to merge with regular bikes. Reflections from my own ongoing research for instance raise different concerns of adding e-bicycles to a context of high bicycle use. It makes vulnerable people go faster than their 'normal' bike speed, and this has been attributed as leading cause of higher numbers of severe single-bike accidents (NOS, 2019). In many other European contexts, an e-bike itself is already much safer than a car, especially for other people. It is more likely that people considering making the modal shift are younger and stronger, and therefore less likely to be as concerned about safety as the older population that uses e-bikes in the Netherlands.

"In contexts that are currently car dominated, the e-bike can add a new choice to people's mobility portfolio."

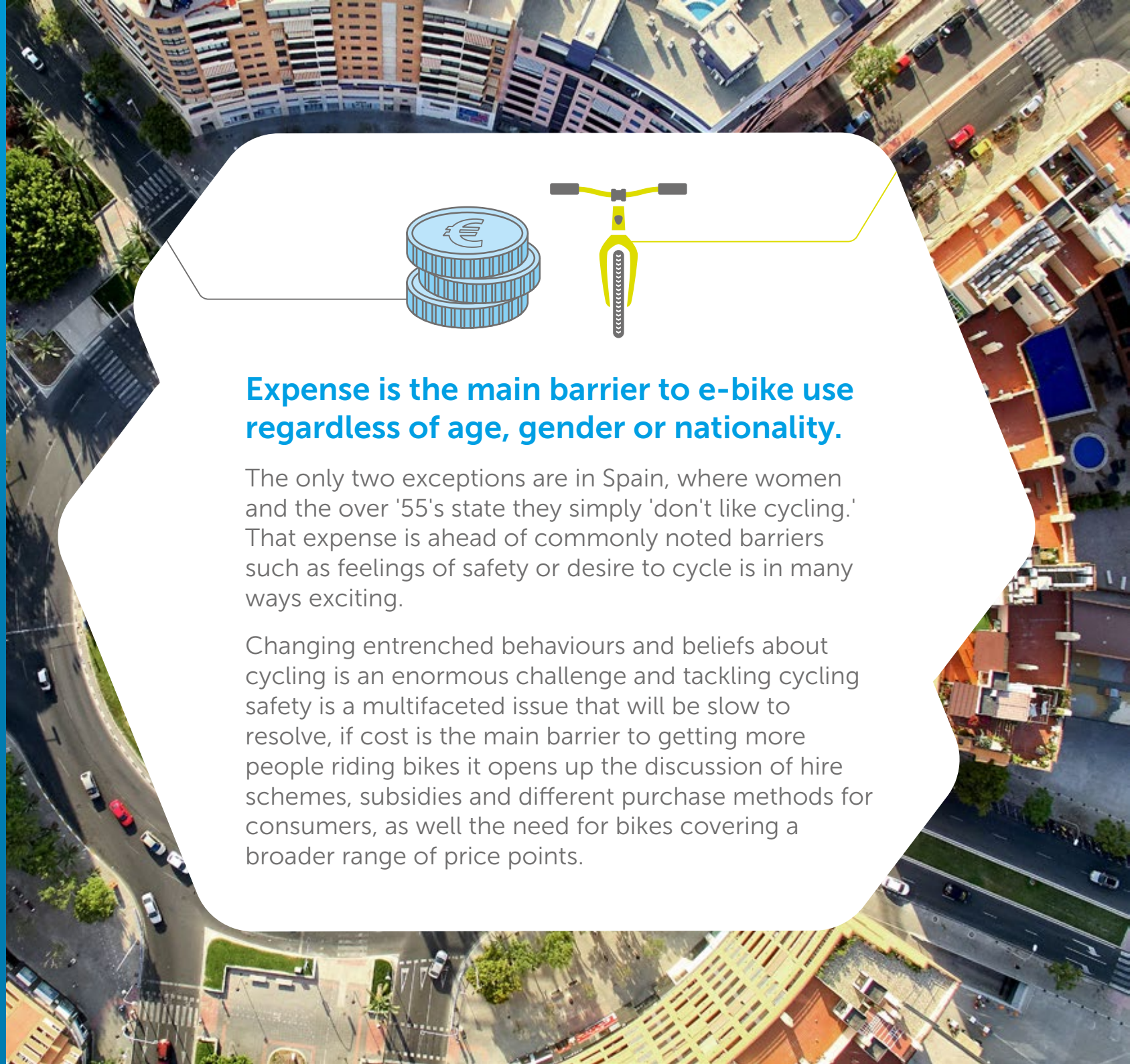
E-bikes are very popular in the Netherlands, but the added value of e-bikes is limited in an urban setting here, due to the short distances between traffic lights, the importance of negotiation, and the prevalence of a culture where a simple bicycle is still highly valued. The electric support adds a barrier into the direct communication between cyclists at places of negotiation, which limits the usefulness of e-bicycles in any Dutch urban context (Te Brömmelstroet, n.d.).

A more intricate effect of the e-bike is on seeing the bicycle as a no-nonsense, easy access means of mobility that suits all segments of a society. The link of cycling with an egalitarian culture in the Netherlands and Denmark is well studied as an important reason for its continuous high levels of cycling (Kuipers, 2013).

And finally, the conviviality of a regular Dutch bicycle (Illich, 1973) refers to the idea that it is a simple vehicle that you can easily maintain yourself. The pride associated with that can be an important element of cycling's appeal and could be diminished by adding complexity with a motor and battery. Again, as with other concerns, these play a much more limited role in contexts where cycling currently is marginal. There, a faster/easier way of cycling could mean that for many people, their car dependency is removed. In contexts that are currently car dominated, the e-bike can add a new choice to people's mobility portfolio.

"When we can use e-bikes to get people to cycle more often, more distance than they used to, it has clear benefits over for instance driving a car."

2 Economics



Expense is the main barrier to e-bike use regardless of age, gender or nationality.

The only two exceptions are in Spain, where women and the over '55's state they simply 'don't like cycling.' That expense is ahead of commonly noted barriers such as feelings of safety or desire to cycle is in many ways exciting.

Changing entrenched behaviours and beliefs about cycling is an enormous challenge and tackling cycling safety is a multifaceted issue that will be slow to resolve, if cost is the main barrier to getting more people riding bikes it opens up the discussion of hire schemes, subsidies and different purchase methods for consumers, as well the need for bikes covering a broader range of price points.

Within Europe, residents of the UK **(19%)** and Switzerland **(15%)** feel the least safe cycling.

1 in 4 Italian, Dutch, Spanish and Norwegians think an e-bike will save them money

One third of Spanish and Italians say an e-bike will reduce their travel time

Jill Warren

Co-CEO, European Cyclists' Federation

Jill Warren joined the European Cyclists' Federation in 2020 as co-CEO. Prior to joining ECF she spent over 20 years in senior roles at major international law firms, most recently as Global Chief Marketing Officer at Bird & Bird. She has also worked in the automotive, pharmaceutical and publishing industries. A US and Dutch national, Jill has lived and worked in the US, Germany, London and Brussels, where she is now based. Her strong passion for cycling attracted her to ECF: She is an avid every-day and recreational cyclist, who loves exploring the world by bike on cycling holidays.

The use of e-bikes is an important part of active mobility in Europe. E-bike sales continue to grow rapidly and e-bikes are fast becoming the option of choice for millions of commuters, travellers and recreational cyclists. The European Cyclists' Federation (ECF) actively promotes the increased adoption of e-bikes not only as a sustainable and healthy means of transport and leisure, but as a viable alternative to trips by car.

The benefits at a societal and individual level are huge. Besides contributing to greatly reduced CO2 emissions, pollution and congestion, e-bikes enable longer distances to be cycled with the same level of effort as conventional bikes, they open up cycling to groups that have not cycled previously, and they are much cheaper to operate than cars. E-bike manufacturing and sales also contribute significantly to Europe's economy, with numerous innovative SME's creating European jobs.

The benefits of e-bikes have become even more apparent in the COVID-19 recovery phase, where they are considered as a way to maintain social distancing and ease overcrowding on public transport, and for their role in a green recovery.

Shimano's second State of the Nation report highlights the increased interest in e-bikes in Europe, as well as enormous further potential for their adoption. With an average 17% of survey respondents expressing greater willingness to buy or use an e-bike than 12 months ago, and between 26 and 30% of respondents in countries as varied as Italy, the Netherlands and Switzerland doing so, this is very good news for the future of e-biking in Europe.

What would be the main purpose for buying an e-bike? Though leisure and family cycling topped the results of Shimano's study in Europe overall, travel/commuting was close behind and was the clear number one purpose cited by younger respondents. We see this as an encouraging sign that many more Europeans of all ages will increasingly choose e-bikes not only for family cycling outings or cycling holidays, but also for commutes to and from work, shopping and other errands.

"With an average 17% of survey respondents expressing greater willingness to buy or use an e-bike than 12 months ago, and between 26 and 30% of respondents in countries as varied as Italy, the Netherlands and Switzerland doing so, this is very good news for the future of e-biking in Europe."

The study also confirms cost as a major barrier to purchasing an e-bike. ECF strongly supports measures to make e-bikes available to more people, such as a centralised EU E-bike Access Fund to support purchase premiums or bike sharing, rental and leasing schemes, fiscal incentives and other local or national initiatives such as a proposed plan in Italy to provide €120 million for bicycle purchase subsidies and calls in Germany for a "Mobility Premium for Everyone".

ECF has long advocated for public investments in cycling infrastructure that facilitate safer cycling, addressing a further barrier to the purchase and use of e-bikes highlighted in the study. We also support further investments in cycling tourism, a growing part of the tourism sector enjoyed by conventional and e-bike users alike, which we expect will only continue to increase in popularity, contributing to ever higher sales of e-bikes.

ECF congratulates Shimano on the contribution this study makes to understanding the motivations for using e-bikes and promoting increased e-bike adoption.

"European Cyclists' Federation strongly supports measures to make e-bikes available to more people"

2 Economics

Hannes Neupert

Industrial Designer

Working in the field of electric bicycles since 1982 Hannes Neupert is a founding member of ExtraEnergy.org a NGO with the target to support the market development of light electric vehicles, especially electric bicycles by independent tests, special exhibitions, test tracks and conferences. He is a co-founder and member of the board of BATSO.org, a battery safety organisation as well EnergyBus.org an industrial organization promoting a non-proprietary interface ecosystem for light electric vehicle components. He is head of Task 23 on LEV parking and charging infrastructure, a working group of the International Energy Agency Hybrid and Electric Vehicle Implementing Agreement. He has been active in many roles in national and international standardisation groups in the area of LEVs and has worked in the development and production of a battery safety test lab at the University of Münster Germany for lithium battery research.

This research shows that we are still in the early stages of the e-bike or pedal electric cycle (pedelec) market in Europe and there is still some way to go until the e-bike is established as a normal means of transport for the majority of the 750 million Europeans, but the results of the survey are very positive. Additionally, the impact of the corona virus pandemic looks set to be a catalyst to help accelerate the provision of dedicated space for cycles, both safe riding and the parking and charging of bicycles and pedelecs.

E-bike pioneer countries such as the Netherlands, Germany and Switzerland still stick out in some of the answers, but some other countries have picked up e-bike use at a rapid pace, for example Italy, Sweden and Poland and these countries are catching up to the early adopter countries. I was happily surprised that in all countries (except Germany) more people understood that riding an electric bicycle will deliver health benefits than those who took the position that e-bikes are a kind of “cheating” device.

In my opinion anyone who considers the e-bike a cheating device has never had the experience of riding an e-bike, especially an electric mountain bike. A test ride would immediately make them realise that riding an e-bike will improve your overall fitness, for a start e-bikes are so much fun to ride you will want to cycle all the time! Research has shown that e-bike riders ride more frequently and more often than they would on a conventional bike.

Providing test ride opportunities is critically important as for most people the e-bike is still a new type of vehicle. I am a partner in the EU GoPedelec project, in 2012 we asked a similar set of questions to persons in seven EU countries, but in our research after the first round of questioning we provided a test ride opportunity. When asked the same questions again after the test ride their opinions had changed dramatically, with many saying they would buy themselves an e-bike.

"...some countries have picked up e-bike use at a rapid pace, for example Italy, Sweden and Poland and these countries are catching up to the early adopter countries"

Providing consumers with the opportunities to try e-biking will be necessary for some years to achieve widespread understanding of e-bikes and to turn the sales of 2019, with about 2,5 Million units sold, to a number closer to 40 to 50 Million annual sales. Whilst it sounds ambitious this is a number of sales would allow a sustainable market - considering that on average an e-bike will be in use for ten years before it will need to be replaced.

The consideration that e-bikes are too expensive was a very common answer across all European countries. In countries where e-bikes are frequently used in a sports and leisure context cost as a barrier was not so dominant, but in countries where e-bikes are mainly used for transport the cost of an e-bike was more sensitive. Development of new technology could help to cut the total cost of ownership and a lower total cost of ownership could quickly trigger the market to see sales of 10+ million units annually.

Health and Leisure seems still to be the main market driver, followed by commuting. Surprisingly safe parking was more of a worry than the subjective feeling of being safe on the road/cycle lane, parking and safe storage is an issue that needs to be addressed for more widespread use of e-bikes. My executive summary is this, Europe will see a cycle revival, thanks to the electric bicycle technology transforming market acceptance of the bicycle in general. Cycling will return to Europe - bigger than ever before!

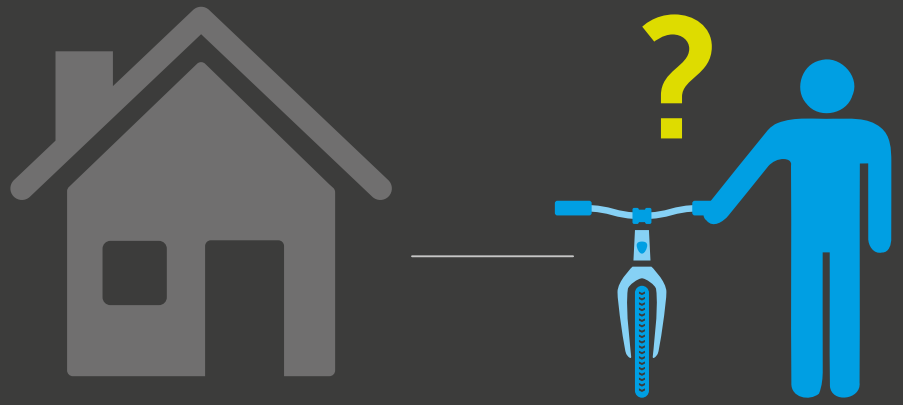
"Providing test ride opportunities is critically important as for most people, the e-bike is still a new type of vehicle."

5 Travel & Commuting

E-bikes have a clear benefit for travel and commuting, which is recognised by users and potential users across europe.

E-bikes allow cyclists to travel further, with greater ease, saving time and money on their regular method of commuting. Post Covid-19 the potential for e-bike growth as commuters choose to avoid public transport and take to their bikes for social distancing is huge. However, for that potential to be realised to its full, respondents say issues around secure storage and cycle parking need to be resolved.

Lack of safe storage at work or home is a barrier to e-bike use for **16%** of Europeans



Italy **(22%)**, Spain **(21%)**, and Poland **(21%)** are the countries most affected by a lack of safe storage.

Travel and commuting is the number one reason for using an e-bike for all age categories **under 55**

5 Travel & Commuting

25-34 year olds are the most likely to use an e-bike for carrying heavy loads, such as groceries or children

The Netherlands (**39%**) and Poland (**32%**) are the nations most attracted to the ease of e-biking

Swiss respondents were the most likely to use an e-bike for carrying heavy loads such as groceries or children (**19%**)

Chris Bruntlett

Co-Founder – Modacity

Chris Bruntlett is co-founder of the creative agency Modacity, and co-author of the book, "Building the Cycling City: The Dutch Blueprint for Urban Vitality". Currently based in the beautiful (and bicycle-friendly) city of Delft, Chris uses his knowledge and passion to share practical lessons for cities around the world wishing to follow in the Netherlands' footsteps and become better places to live, work, and of course, cycle.

As regions around the world begin to reevaluate their relationship with the private automobile, the e-bike has emerged as a prospective game-changer and 2020 may prove to be the moment it finally bursts into the mainstream mobility mix.

Facing diminished public transport capacity cities are starting to rapidly reallocate street space away from single occupant motor vehicles, to enable more efficient modes for journeys up to 20 km. There's little doubt the traditional non-motorized bicycle can do a portion of that heavy lifting, but a simple, pedal-assisted boost can be nothing short of transformational, addressing many of the physical and psychological barriers to its mass uptake. Any potential health benefit loss is quickly negated, as studies show e-bike users ride further, more frequently, and into older age; inducing trips they wouldn't otherwise make due to ability, temperature, terrain, or distance.

Switching just a fraction of automobile trips to the electric bicycle could save societies billions, addressing myriad problems such as obesity, congestion, air quality, noise pollution, and road safety. But this seemingly limitless potential to transform our cities won't be fully realized without addressing three major barriers identified in this survey: lack of infrastructure, lack of storage, and the up-front expense.

Firstly, the development of the requisite infrastructure—taking into account higher volumes, speed differences, and distances—is absolutely critical. Secondly, employers and governments must collaborate to construct suitable end-of-trip facilities, including lockers, underground garages, and secure parking. Last but not least, as 40% of respondents indicated, the blow of that initial expenditure needs to be softened, and the up-front cost reduced through tax benefits, incentive schemes, and/or subsidy programs—similar to electric cars.

E-bikes won't be utilized in significant numbers without a safe space on which to ride them, a safe space in which to store them, and an added incentive to purchase them. But once that playing field is levelled, and people of all ages, abilities, and economic means can pedal happily and comfortably on their own streets the brakes will be well and truly off for the impending e-bike revolution.

"this seemingly limitless potential to transform our cities and towns won't be fully realized without additional support from both the public and private sectors"

Heather Lawson

e-cargo bike user

Heather Lawson bought an e-cargo bike to replace her family's second car. She uses it daily for tasks including, shopping, transporting her children and commuting.

We use our e-cargo bike for all sorts, it has a space for our two children so we regularly use it for commuting, dropping the kids at nursery on the way. When I am at home I use it for getting around Durham. Durham is a small city but its hilly with congestion issues and high parking charges. I wouldn't go into the city centre with a car but I'm comfortable doing it by bike. We also use it to head into the countryside and villages nearby, even with the two children on the bike I can cycle some distance, I regularly make a 5-mile journey to a children's story-time at a cafe.

We find food shopping is much more convenient by bike, as the road access to our nearest supermarket is shocking. The road gets clogged with queues of cars visiting the store but the cycle access, by designated cycle route, is much quicker. I can carry a week's worth of shopping on the bike. We use the bike to go to the garden centre and for pleasure, cycling as a family to a local nature reserve. It is absolutely central to our daily life, typically we prefer it and the kids complain now if they have to go in the car.

Buying the e-cargo bike is one of the best things we have done, it has changed the way we use transport. It was expensive but when our second car broke down, we bought the bike instead of replacing the car. It was a bit of a leap for us as we weren't keen cyclists. We compared the costs of running a car and running an e-bike and concluded that over three years of regular use the bike will make its money back.

"It is absolutely central to our daily life... the kids complain now if they have to go in the car."

The only way you can get a tax-break (in the UK) is on the cycle to work scheme, our employer didn't have one in place and because of the cost of an e-bike was reluctant to include it. It's frustrating that it's the only way you can get a tax break and its totally reliant on the employer being willing to do it. It seems wrong that there are tax breaks on e-vehicles but not on e-bikes, when e-bikes offer broader benefits to both personal health and to wider society.

We thought hard about what bike to get, it was critical to make its use as simple as possible, we wanted to be able to just throw the kids in and go. It had to have integrated lights and an integrated spoke lock for when you are stopping briefly. We loved it from the start. I was admittedly less enthusiastic in the rain and winter but we continued to use it. I have started conversations with our employer about finding somewhere safe to store it at work. I have suggested we take one of the carparking spaces to create ten bike spaces, which would help inspire other people to start cycling to work. I think more people would cycle if employers were more supportive.

With fears around social distancing it may be that society becomes more polarised between car and bike use. I think e-cycling can fill the space between being a mode of transport and a fitness activity. You don't have to wear Lycra and be riding a fast sixty miles every weekend, I cycle in normal clothes, I don't want to wear anything special. Cycling is part of my lifestyle but my e-bike also benefits my fitness. Even though I have battery assistance I'm still working, I'm carrying two children up a hill!

I think we have a unique opportunity right now to change a lot about our society, I hope people who have got into cycling during lockdown will continue, but it needs the government to make good on their promises around cycling infrastructure. We are on the cusp of huge behavioural change between what's old and what's new, it's a massive opportunity to change many aspects of society for the better and I think e-bikes and cycling has a role to play in that.

Details available on request

"It was a bit of a leap for us as we weren't keen cyclists."

4 Leisure & Fitness

With one in three choosing an e-bike to go further and tackle steeper terrain it is no surprise to see that e-bikes play an important role in the leisure time of users.

Whilst there are differences between nationalities, viewed as a whole, leisure and family cycling is the dominant reason for e-bike use. Interestingly very few choose an e-bike as a way to keep up with other riders, it is consistently listed as the least significant motivating factor. This suggests e-bikers are either riding with other e-bikers, thus levelling the playing field, or that its ease that holds the appeal.

Reasons for using an e-bike

31%

For leisure / family cycling

28%

For travel / commuting

16%

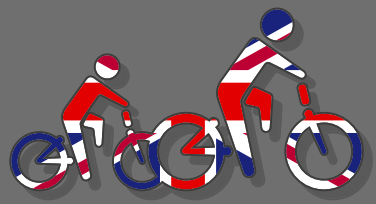
For sport / fitness

11%

Carrying heavy loads (groceries, children)

8 countries have leisure/family cycling as their main reason for e-bike use

UK 31%



Germany 43%

Poland 37%

Netherlands 40%

Norway 29%

Denmark 31%

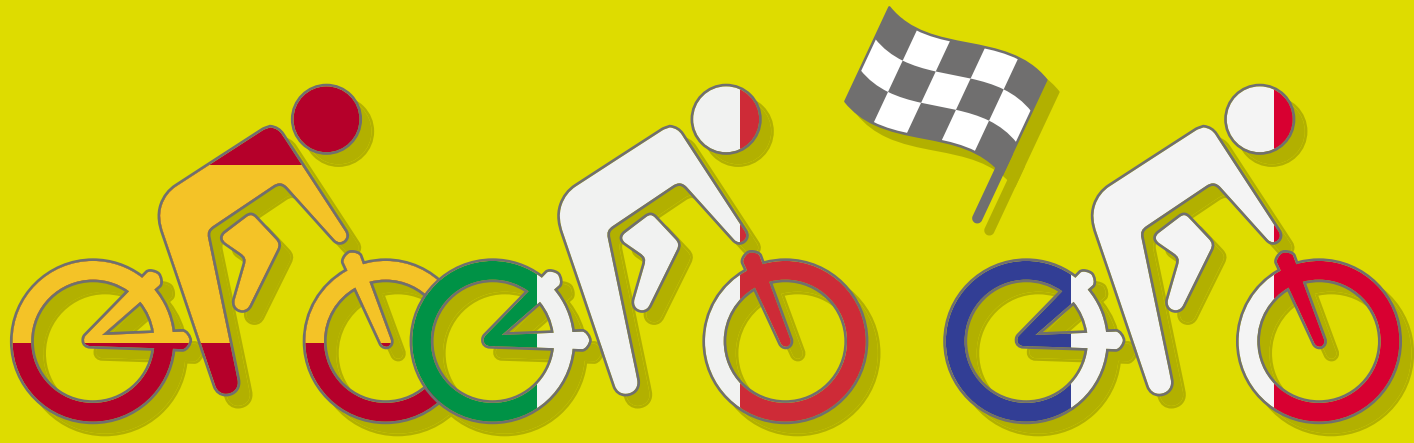
France - 33%

Switzerland 23%

4 Leisure & Fitness

3 countries have travel/commuting as their main reason for e-bike use

Italy, France and Spain are the countries most motivated by sport and fitness for e-bike use



Spain 21%

Italy 25%

France 27%

Dan Hirst

Owner of cycling holiday specialists, Skedaddle Espana, skedaddle.com

Based in the coastal town of Tarifa, in Andalusia, at the southernmost tip of the Iberian Peninsula, Dan Hirst has been running guided and self-guided road cycling, mountain biking and leisure holidays across Spain for twenty years.

As a holiday company we are always looking at different markets and watching how they develop. We now run specific e-mountainbike holidays and offer e-bikes on our road, leisure and self-guided trips. In 2019 as many as 20 % of our customers used e-bikes. Three years ago we didn't have the suppliers to rent from but now we have excellent partners. E-bikes are a massive investment, but we are thinking of buying a fleet because we know the customer demand is there.

Our original perception was that e-mountainbiking was for older or less fit people, but we soon realised it was awesome for riding in the mountains, giving us access to a broader range of trails. We developed specific e-mtb holidays to make best use of the advantages e-bikes offer; we need to use less vehicle uplifts and we can cover more trails than on our conventional bikes. In our first year we offered three guided e-mtb trips in Sierra Nevada and have extended our range this year to include the Pyrenees.

There are challenges to designing e-bike holidays, ensuring daily distances were manageable with battery range and finding hotels who would let us charge bikes. There is added tech with e-bikes which can make maintenance on the trail tricky, however even if the battery goes flat it is still possible to ride an e-bike. Anxiety about batteries was an initial concern for customers. Although nobody ran out of battery on any trips, we noticed customers wanted to challenge battery life. If they still had battery left at the end of the ride they wanted to have gone further! Single track climbs are when you feel like you are using the e-mtb to its full capacity. On an 800-metre off-road climb riders arrived within five minutes of each other, fresh for the technical descents. Our customers commented that their technical off-road skills improved as they had the energy to try new things and develop their technique.

E-bikes give us greater access, we can climb hills and mountains that are normally beyond our physical capabilities, allowing us to explore new terrain, as well as ride further. On the road our customers can extend their rides, both in distance and climbing. Importantly e-bikes are so much fun! E-bikes mean customers see more of their holiday destination from the saddle and in the evening are less tired so more likely to explore the local hospitality and tourism opportunities the area presents. We are developing our range of e-bike trips as we see this is a growing part of our business.

"In 2019 as many as 20 % of our customers used e-bikes"

Leisure & Fitness - Italy

Leisure & Fitness - Italy

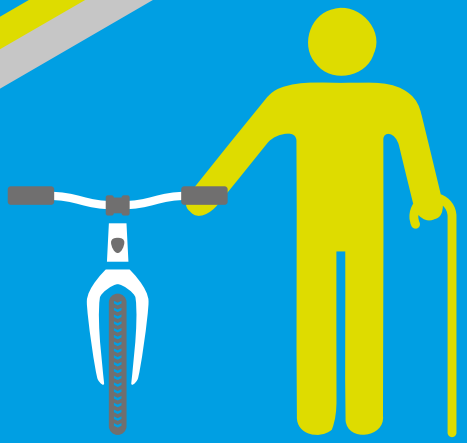
5 Health

There is a huge opportunity for e-bikes to benefit the health of a large number of Europeans with 11% of those who currently don't cycle saying they are likely to buy or use an e-bike in the next year.

Amongst those likely to buy an e-bike improving physical and mental health are strong motivating factors, however one in five say an e-bike will not increase their fitness, so there are still some misconceptions to dispel in this area.

30% of Europeans say they would use an e-bike to improve their physical health

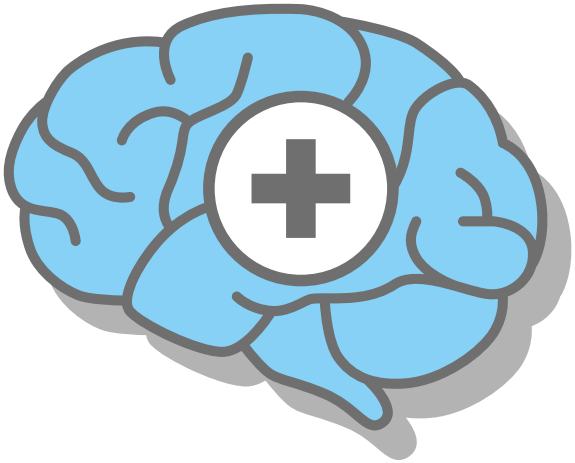
One in five young-adults say e-bikes are cheating

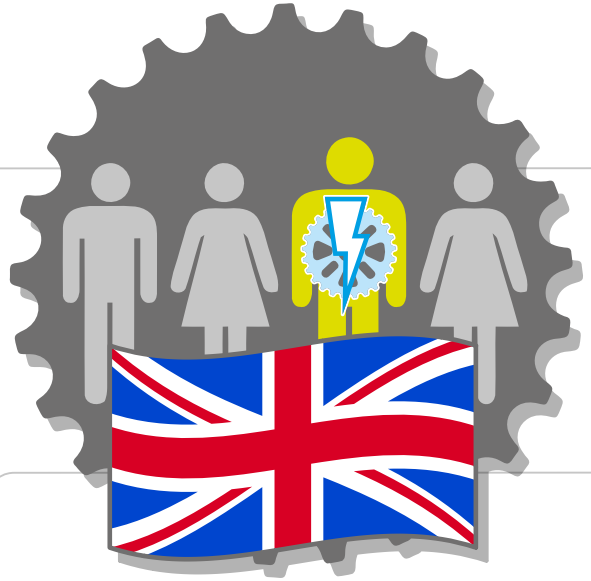


Only **5%** think e-bikes are only for the older generation

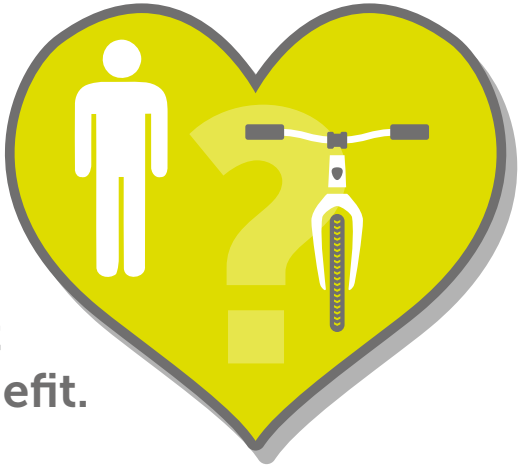
5 Health

22% would use an e-bike for mental health benefits





In the UK over a quarter **(28%)** of those who are now more likely to use an e-bike this year currently never ride a bike.



19% are put off using an e-bike because they don't think their fitness will benefit.

Professor Chris Oliver

Edinburgh professor and orthopaedic consultant surgeon

Also Known as 'The Cycling Surgeon' Chris Oliver cycled Los Angles to Boston in 2013 after 70Kg weight loss. As a surgeon he had a specialist interest in cycling injuries and reconstructive surgery. Based in Scotland he is currently an Associate Research Fellow at the School of Engineering and Built Environment, Transport Research Institute, Edinburgh Napier University and the King James IV Professor, Royal College of Surgeons of Edinburgh 2019-20.

It is good to see that the users, and potential users, of e-bikes appreciate that they have a role to play in improving physical and mental health. Although there is still a perception that e-bikes are cheating, and that e-bikes will not benefit fitness, even though it has been shown in other research that exercise on an e-bike is comparable to normal cycling.

There is a general acceptance across Europe that e-bikes improve physical and mental health. Significantly, e-bike cycling reduces the risk factors for a number of diseases, including cardiovascular disease, respiratory disease, some cancers, and Type II diabetes. People across Europe are now beginning to really appreciate that e-bike cycling also has positive effects on mental health. The mental health and neurological benefits have only recently become appreciated and include reduced risk of dementia, improved sleep quality, and a greater sense of wellbeing. In environmental terms, health benefits of e-bike riding accrue for the general population from a reduction in pollution due to reduced car use and a decrease in road congestion. The lower levels of pollution and improved air quality, during periods of lockdown, are as unprecedented as the pandemic. The overall evidence is that the health benefits of e-bike cycling outweigh any potential health risks and harms – for example from injury or air pollution.

The corona virus pandemic has caused a real requirement for urgent extra space to facilitate safe social distancing. There are many questions- will this new money influx be sustained post lockdown? How will these changes become persistent and incorporated into useful cycling and walking infrastructure? E-bikes have been shown to extend the distances people can cycle, and with more widespread use at least 20% of people in the UK could cycle to work. Most commutes in the UK are less than five miles. New developments in active travel, as result of the pandemic, will facilitate many more people traveling by bicycle. New users may well choose e-bikes to travel longer distances to work as they can arrive in their workplace less exhausted and sweaty. E-bikes could really become very popular.

"I think people across Europe are now beginning to really appreciate that e-bike cycling also has positive effects on mental health and general wellbeing."

Phil Burt

Physiotherapist and cycling health and performance innovator.

An experienced physiotherapist and bike fitter based in Manchester, UK, Burt has spent 12 years as the Head of Physiotherapy at British Cycling, as well as 5 years as Consultant Physiotherapist at Team Sky. Author of best-selling sports books 'Bike Fit' and 'Strength and Conditioning for Cyclists'.

E-bikes democratise cycling, making it an activity for everyone regardless of age or physical ability. Cycling is already one of the least injurious sports in terms of destructive forces on the body. There are significantly less forces on the body than in other sports, running for example and because of this people with a history of injuries or older people, are able to continue cycling when other sports become less possible.

When you cycle the only real effort or strain is getting going from a standstill or getting up and over inclines or hills. In these instances, the cadence is slow and the force needed to move the pedal is higher than when rolling along on the flat. In effect it's an increase in load or a load spike. Load spikes are well documented by research as correlating with increases in injury or physical break down.

If you have an underlying medical condition, or have had a joint replacement, you may need to avoid load spikes that place strain on your heart or joints. Yet, the conundrum is that moderate cycling is the perfect conditioning tool for the whole body. The use of an e-bike smooths out the load spike. The battery powered pedal assistance is only there when you need it. It helps you to get up to speed then drops away, balancing its assistance with your efforts. The holy grail of modern sports medicine is to reduce injury rates and e-bikes offer the perfect solution to decreasing load spikes in cycling, increasing pain-free enjoyment and fitness for their users. That e-bikes allow you to work hard, but injury risk free, is game changing in my opinion.

"...it allows people of different sizes, weights, fitness and health to engage in and benefit from physical activity"

Furthermore, the evidence I've seen from Germany suggests people who use an e-bike cycle further and more often than they did before. E-cycling is a redistribution of the overall effort, it allows people of different sizes, weights, fitness and health to engage in and benefit from physical activity. E-bikes are so advanced now most can be programmed to only help you when you decide you need it most. In a health and fitness context e-cycling couldn't be further from cheating.

I have rehabilitated many people from injury, with great success, by using e bikes. One amputee uses his e-bike to get out of the city to reach the more challenging hills he uses for training. Without an e-bike, to save time and energy, he would use his car to drive to areas of more peaceful cycling. E-bikes allow you to ride further, benefitting your fitness, and helping you to access more enjoyable places to cycle. That could mean escaping a city or climbing a mountain that would otherwise be too far or too steep.

In the aftermath of Covid-19 a wave of cycling adoption is coming as people look for new ways to travel. In terms of transport e-bikes bring moving heavy loads such as shopping or taking the kids to school into the realms of possibility for all, allowing everyone to seamlessly integrate increased levels of physical activity into their daily lives.

"In a health and fitness context e-cycling couldn't be further from cheating."

OE Comments

OE Comments

Closing Statement

As we put the finishing touches to this report in the Netherlands our society is just beginning to find out how to adapt to the 'new normal'.

Social distancing restrictions are in place on public transport and the signals are that the ways in which we travel in towns and cities across Europe will not be the same as they were before Covid-19.

From buses to trains, ferries and aeroplanes, public transport has been affected and personal space is in high demand. At the same time, working from home is encouraged in certain economies, which can increase leisure time and increase the frequency of short-distance journeys.

Factors like these have driven high demand for bicycles in recent months, especially for new cyclists.

Whilst the e-bike can be seen as a premium or luxury purchase compared to a regular bicycle, it also serves a highly practical and economical purpose in terms of both time and finance when compared to mass transit methods or private motor vehicles.

Making that leap from a regular bicycle, or from other private or public transport methods towards an e-bike is a decision that can be affected by many different factors. This report goes some way to shedding light on that. This information 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.

Contacts & References

Data collection method

All figures, unless otherwise stated, are from YouGov Plc. Total sample size was 13,412 adults in the Netherland, Italy, Denmark, France, Sweden, Germany, UK, Switzerland, Norway, Spain and Poland. Fieldwork was undertaken between 30th March - 29th April 2020. The survey was carried out online. The figures have been given an even weighting for each country to produce an 'average' value.

For further information on items contained within this report visit: **https://media.shimano-eu.com/en-CEU/tags/e-bikes/**

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Page 16

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Page 39

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Picture Credit Page 33

Rob at Lighttrapper Photography

Survey commissioned by Shimano Europe
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Published June 2020

Approximately, how often, if at all, have you ridden any type of bicycle in the past year (i.e. since March 2019)?

EUROPE		Buy Or Use	
Frequency	**Overall**	**Likely To Buy Or Use**	**Not Likely To Buy or Use**
5 times a week or more	9%	15%	7%
3-4 times a week	9%	16%	6%
1-2 times a week	11%	20%	8%
3-4 times a month	6%	10%	5%
1-2 times a month	8%	10%	7%
Once every 3 months	5%	6%	5%
Once every 6 months	4%	3%	4%
Once in the last year	8%	5%	9%
Don't know	4%	3%	3%
Not applicable - I never use a bicycle	33%	11%	43%
Not applicable - I do not know how to ride a bicycle	4%	1%	4%

UK		Buy Or Use	
Frequency	**Overall**	**Likely To Buy Or Use**	**Not Likely To Buy or Use**
5 times a week or more	2%	9%	2%
3-4 times a week	3%	7%	3%
1-2 times a week	4%	8%	4%
3-4 times a month	2%	4%	2%
1-2 times a month	3%	9%	3%
Once every 3 months	4%	11%	3%
Once every 6 months	3%	7%	3%
Once in the last year	8%	14%	8%
Don't know	3%	2%	2%
Not applicable - I never use a bicycle	62%	28%	67%
Not applicable - I do not know how to ride a bicycle	5%	1%	5%

FRANCE		Buy Or Use	
Frequency	**Overall**	**Likely To Buy Or Use**	**Not Likely To Buy or Use**
5 times a week or more	4%	10%	3%
3-4 times a week	5%	12%	3%
1-2 times a week	9%	20%	5%
3-4 times a month	6%	10%	5%
1-2 times a month	7%	11%	7%
Once every 3 months	7%	12%	6%
Once every 6 months	6%	6%	6%
Once in the last year	10%	6%	11%
Don't know	4%	2%	3%
Not applicable - I never use a bicycle	37%	11%	47%
Not applicable - I do not know how to ride a bicycle	4%	-	4%

GERMANY		Buy Or Use	
Frequency	**Overall**	**Likely To Buy Or Use**	**Not Likely To Buy or Use**
5 times a week or more	8%	14%	8%
3-4 times a week	9%	19%	7%
1-2 times a week	13%	25%	11%
3-4 times a month	8%	10%	7%
1-2 times a month	8%	9%	8%
Once every 3 months	4%	6%	4%
Once every 6 months	3%	3%	4%
Once in the last year	8%	8%	9%
Don't know	4%	2%	3%
Not applicable - I never use a bicycle	32%	6%	39%
Not applicable - I do not know how to ride a bicycle	2%	-	1%

SPAIN		Buy Or Use	
Frequency	**Overall**	**Likely To Buy Or Use**	**Not Likely To Buy or Use**
5 times a week or more	6%	12%	4%
3-4 times a week	7%	17%	3%
1-2 times a week	10%	24%	6%
3-4 times a month	6%	12%	4%
1-2 times a month	8%	9%	6%
Once every 3 months	5%	4%	4%
Once every 6 months	4%	2%	4%
Once in the last year	13%	8%	14%
Don't know	5%	2%	5%
Not applicable - I never use a bicycle	30%	10%	40%
Not applicable - I do not know how to ride a bicycle	7%	0%	11%

ITALY		Buy Or Use	
Frequency	**Overall**	**Likely To Buy Or Use**	**Not Likely To Buy or Use**
5 times a week or more	8%	11%	5%
3-4 times a week	8%	13%	6%
1-2 times a week	14%	22%	9%
3-4 times a month	8%	12%	4%
1-2 times a month	9%	13%	8%
Once every 3 months	4%	4%	6%
Once every 6 months	4%	2%	5%
Once in the last year	8%	7%	10%
Don't know	3%	1%	3%
Not applicable - I never use a bicycle	31%	14%	40%
Not applicable - I do not know how to ride a bicycle	3%	1%	6%

NETHERLANDS		Buy Or Use	
Frequency	**Overall**	**Likely To Buy Or Use**	**Not Likely To Buy or Use**
5 times a week or more	23%	29%	18%
3-4 times a week	21%	27%	18%
1-2 times a week	20%	22%	19%
3-4 times a month	6%	7%	4%
1-2 times a month	7%	6%	6%
Once every 3 months	3%	2%	4%
Once every 6 months	1%	0%	1%
Once in the last year	3%	2%	4%
Don't know	1%	1%	1%
Not applicable - I never use a bicycle	11%	4%	22%
Not applicable - I do not know how to ride a bicycle	3%	0%	4%

NORWAY		Buy Or Use	
Frequency	**Overall**	**Likely To Buy Or Use**	**Not Likely To Buy or Use**
5 times a week or more	5%	9%	4%
3-4 times a week	5%	12%	3%
1-2 times a week	9%	14%	7%
3-4 times a month	7%	8%	7%
1-2 times a month	10%	14%	8%
Once every 3 months	6%	5%	7%
Once every 6 months	4%	9%	3%
Once in the last year	8%	4%	11%
Don't know	4%	4%	3%
Not applicable - I never use a bicycle	38%	19%	44%
Not applicable - I do not know how to ride a bicycle	3%	2%	3%

SWEDEN		Buy Or Use	
Frequency	**Overall**	**Likely To Buy Or Use**	**Not Likely To Buy or Use**
5 times a week or more	11%	16%	10%
3-4 times a week	10%	12%	9%
1-2 times a week	9%	14%	8%
3-4 times a month	7%	15%	6%
1-2 times a month	8%	13%	7%
Once every 3 months	7%	7%	7%
Once every 6 months	3%	1%	4%
Once in the last year	7%	3%	9%
Don't know	6%	5%	4%
Not applicable - I never use a bicycle	31%	15%	35%
Not applicable - I do not know how to ride a bicycle	2%	-	2%

DENMARK		Buy Or Use	
Frequency	**Overall**	**Likely To Buy Or Use**	**Not Likely To Buy or Use**
5 times a week or more	19%	16%	22%
3-4 times a week	11%	15%	9%
1-2 times a week	9%	18%	7%
3-4 times a month	6%	12%	5%
1-2 times a month	9%	12%	7%
Once every 3 months	5%	8%	4%
Once every 6 months	4%	1%	4%
Once in the last year	7%	5%	7%
Don't know	4%	3%	3%
Not applicable - I never use a bicycle	26%	10%	31%
Not applicable - I do not know how to ride a bicycle	0%	-	0%

SWITZERLAND		Buy Or Use	
Frequency	**Overall**	**Likely To Buy Or Use**	**Not Likely To Buy or Use**
5 times a week or more	9%	14%	6%
3-4 times a week	8%	12%	7%
1-2 times a week	12%	20%	9%
3-4 times a month	8%	12%	6%
1-2 times a month	11%	11%	11%
Once every 3 months	5%	5%	7%
Once every 6 months	5%	5%	6%
Once in the last year	5%	3%	7%
Don't know	8%	7%	4%
Not applicable - I never use a bicycle	17%	8%	32%
Not applicable - I do not know how to ride a bicycle	12%	3%	6%

POLAND		Buy Or Use	
Frequency	**Overall**	**Likely To Buy Or Use**	**Not Likely To Buy or Use**
5 times a week or more	11%	16%	7%
3-4 times a week	14%	22%	12%
1-2 times a week	20%	25%	17%
3-4 times a month	11%	10%	10%
1-2 times a month	11%	9%	11%
Once every 3 months	5%	6%	6%
Once every 6 months	3%	2%	3%
Once in the last year	5%	2%	8%
Don't know	3%	1%	4%
Not applicable - I never use a bicycle	16%	7%	21%
Not applicable - I do not know how to ride a bicycle	2%	1%	2%

How likely, if at all, are you to buy or use (e.g. loan,hire, rent, etc.) an e-bike than you would have been 12 months ago (e.g. since last March 2019)?

EUROPE	Gender		Age				
Overall	**Male**	**Female**	**18-24p**	**25-34**	**35-44**	**45-54**	**55+**
17% Likely	19% Likely	15% Likely	16% Likely	19% Likely	20% Likely	18% Likely	14% Likely
54% Not Likely	53% Likely	55% Not Likely	56% Not Likely	51% Not Likely	51% Not Likely	52% Not Likely	58% Not Likely

UK	Gender		Age				
Overall	**Male**	**Female**	**18-24p**	**25-34**	**35-44**	**45-54**	**55+**
7% Likely	8% Likely	5% Likely	9% Likely	8% Likely	7% Likely	6% Likely	5% Likely
71% Not Likely	69% Likely	73% Not Likely	62% Not Likely	66% Not Likely	71% Not Likely	67% Not Likely	78% Not Likely

ITALY	Gender		Age				
Overall	**Male**	**Female**	**18-24p**	**25-34**	**35-44**	**45-54**	**55+**
30% Likely	35% Likely	26% Likely	30% Likely	30% Likely	36% Likely	34% Likely	27% Likely
38% Not Likely	35% Not Likely	40% Not Likely	39% Not Likely	38% Not Likely	34% Not Likely	30% Not Likely	42% Not Likely

GERMANY	Gender		Age				
Overall	**Male**	**Female**	**18-24p**	**25-34**	**35-44**	**45-54**	**55+**
10% Likely	12% Likely	9% Likely	7% Likely	12% Likely	14% Likely	13% Likely	8% Likely
64% Unlikely	63% Unlikely	66% Unlikely	61% Unlikely	60% Unlikely	61% Unlikely	67% Unlikely	67% UnLikely

FRANCE	Gender		Age				
Overall	**Male**	**Female**	**18-24p**	**25-34**	**35-44**	**45-54**	**55+**
19% Likely	23% Likely	15% Likely	17% Likely	19% Likely	18% Likely	23% Likely	18% Likely
57% Not Likely	54% Not Likely	60% Not Likely	67% Not Likely	60% Not Likely	56% Not Likely	55% Not Likely	55% Not Likely

NETHERLANDS	Gender		Age				
Overall	**Male**	**Female**	**18-24p**	**25-34**	**35-44**	**45-54**	**55+**
26% Likely	31% Likely	28% Likely	28% Likely	40% Likely	33% Likely	25% Likely	18% Likely
36% Not Likely	33% Not Likely	38% Not Likely	41% Not Likely	26% Not Likely	27% Not Likely	40% Not Likely	39% Not Likely

SPAIN	Gender		Age				
Overall	**Male**	**Female**	**18-24p**	**25-34**	**35-44**	**45-54**	**55+**
21% Likely	23% Likely	19% Likely	20% Likely	20% Likely	26% Likely	22% Likely	19% Likely
53% Not Likely	51% Not Likely	55% Not Likely	57% Not Likely	49% Not Likely	50% Not Likely	50% Not Likely	57% Not Likely

NORWAY	Gender		Age				
Overall	**Male**	**Female**	**18-24p**	**25-34**	**35-44**	**45-54**	**55+**
13% Likely	12% Likely	13% Likely	13% Likely	14% Likely	18% Likely	11% Likely	11% Likely
53% Not Likely	52% Not Likely	54% Not Likely	53% Not Likely	53% Not Likely	42% Not Likely	53% Not Likely	58% Not Likely

SWEDEN	Gender		Age				
Overall	**Male**	**Female**	**18-24p**	**25-34**	**35-44**	**45-54**	**55+**
11% Likely	12% Likely	10% Likely	14% Likely	15% Likely	11% Likely	14% Likely	7% Likely
60% Not Likely	58% Not Likely	61% Not Likely	57% Not Likely	51% Not Likely	56% Not Likely	58% Not Likely	67% Not Likely

DENMARK	Gender		Age				
Overall	Male	Female	18-24p	25-34	35-44	45-54	55+
11% Likely	10% Likely	11% Likely	16% Likely	12% Likely	6% Likely	11% Likely	9% Likely
59% Not Likely	63% Not Likely	55% Not Likely	58% Not Likely	56% Not Likely	59% Not Likely	58% Not Likely	61% Not Likely

POLAND	Gender		Age				
Overall	Male	Female	18-24p	25-34	35-44	45-54	55+
26% Likely	28.% Likely	24% Likely	19% Likely	33% Likely	34% Likely	27% Likely	20% Likely
43% Not Likely	45% Not Likely	42% Not Likely	62% Not Likely	43% Not Likely	39% Not Likely	40% Not Likely	43% Not Likely

SWITZERLAND	Gender		Age				
Overall	Male	Female	18-24p	25-34	35-44	45-54	55+
26% Likely	30% Likely	23% Likely	31% Likely	31% Likely	28% Likely	25% Likely	30% Likely
31% Not Likely	30% Not Likely	32% Not Likely	39% Not Likely	29% Not Likely	31% Not Likely	30% Not Likely	31% Not Likely

Triggers to buying an e-bike - which of the following would make you want to buy an e-bike?

EUROPE	Gender		Age				
Overall	**Male**	**Female**	**18-24p**	**25-34**	**35-44**	**45-54**	**55+**
32% Increase distance/steepness	31% Increase distance/steepness	33% Increase distance/steepness	29% less effort	31% increase distance/steepness	32% increase distance/steepness	30% increase distance/steepness	37% Physical Health
30% Physical Health	30% less effort	31% less effort	27% Save time on travel	28% less effort	29% less effort	30% less effort	35% increase distance/steepness
30% Less effort	29% Physical Health	31% Physical Health	27% Increase distance/steepness	26% Save time on travel	25% Physical Health	30% Physical Health	33% less effort
22% Mental Health	21% Mental Health	22% Mental Health	26% Environmental Impact	25% Save me money	23% Save time on travel	21% Save me money	24% Mental Health
21% Save time on travel	20% Save time on travel	22% Save time on travel	24% Physical Health	23% Physical Health	22% Mental Health	21% Mental Health	17% Save time on travel
19% Save me money	20% Save me money	19% Save me money	23% Save me money	19% Mental Health	20% Save me money	20% Save time on travel	16% Environmental Impact
18% Environmental Impact	18% Environmental Impact	17% Environmental Impact	19% Makes travel time predictable	19% Environmental Impact	17% Environmental Impact	15% Environmental Impact	14% Save me money
12% Makes travel time predictable	15% Tech of the future	11% Makes travel time predictable	19% Mental Health	14% Tech of the future	13% Tech of the future	12% Tech of the future	11% Tech of the future
12% Tech of the future	13% Makes travel time predictable	10% Tech of the future	13% Tech of the future	14% Makes travel time predictable	13% Makes travel time predictable	9% Makes travel time predictable	9% Makes travel time predictable
8% Keep up with other riders	8% Keep up with other riders	7% Keep up with other riders	10% Keep up with other riders	9% Keep up with other riders	7% Keep up with other riders	7% Keep up with other riders	7% Keep up with other riders

ANSWERS KEY:
(A) Environmental Impact = I am concerned about the environmental impact of motor vehicle travel **(B)** Save me money = It could save me money on my travel
(C) Physical health = It would allow me to undertake an activity that is good for my physical health **(D)** Mental Health = It would allow me to undertake an activity that is good for my mental health
(E) Less effort = It looks like less effort ""than normal"" cycling which means I could arrive less sweaty or less tired at my destination
(F) Save time on travel = It could save me time on my travel **(G)** Makes travel time predictable = It could make my travel time more predictable
(H) Tech of the future = I think all bikes in the future will be e-bikes and I want to adopt this new technology now
(I) Keep up with other riders = It would enable me to keep up with other riders **(J)** Increase distance/steepness = I could increase the distance or the steepness of places I can ride to

UK	Gender		Age				
Overall	**Male**	**Female**	**18-24p**	**25-34**	**35-44**	**45-54**	**55+**
33% Physical health	27% increase distance/steepness	41% Physical health	32% Physical health	28% increase distance/steepness	29% increase distance/steepness	31% Physical health	43% Physical health
30% Increase distance/steepness	26% physical health	32% increase distance/steepness	26% less effort	27% environmental impact	26% mental health	29% increase distance/steepness	36% increase distance/steepness
28% mental health	25% mental health	32% mental health	25% less time	25% Physical health	25% Physical health	29% mental health	34% mental health
24% Less effort	23% less effort	29% environmental impact	24% environmental impact	25% less time	24% less effort	24% less effort	29% less effort
23% Environmental impact	20% save money	25% less effort	23% save me money	25% mental health	20% less time	24% environmental impact	23% environmental impact
20% Save me money	18% Environmental Impact	19% Save me money	21% Makes travel time predictable	22% Save me money	20% Save me money	19% Less effort	16% Save me money
18% Save time on travel	17% Save time on travel	19% Save time on travel	19% Increase distance/steepness	19% Less effort	18% Environmental Impact	17% Save time on travel	9% Save time on travel
11% Tech of the future	13% Tech of the future	11% Makes travel time predictable	19% Mental health	12% Makes travel time predictable	12% Makes travel time predictable	12% Tech of the future	9% Keep up with other riders
10% Keep up with other riders	11% Makes travel time predictable	9% Keep up with other riders	19% Tech of the future	7% Keep up with other riders	11% Tech of the future	8% Makes travel time predictable	8% Tech of the future
8% Keep up with other riders	7% Keep up with other riders	8% Tech of the future	7% Keep up with other riders	6% Tech of the future	9% Keep up with other riders	8% Keep up with other riders	7% Makes travel time predictable

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ITALY	Gender		Age				
Overall	**Male**	**Female**	**18-24p**	**25-34**	**35-44**	**45-54**	**55+**
34% less effort	32% less effort	37% Physical health	Not enough respondents	33% Physical health	28% less effort	31% less effort	39% less effort
32% Physical health	32% Save me money	36% less effort		33% less effort	28% Save time on travel	31% Physical health	37% Physical health
28% Save time on travel	27% Physical health	29% Save time on travel		31% Save me money	26% Save me money	25% Save time on travel	32% Save time on travel
25% Save me money	27% Save time on travel	22% Increase distance/steepness		28% Increase distance/steepness	24% Mental health	19% Save me money	26% Save me money
23% Increase distance/steepness	23% Increase distance/steepness	22% Mental health		22% Save time on travel	21% Physical health	19% Mental health	24% Increase distance/steepness
22% Mental health	22% Environmental Impact	19% Save me money		22% Environmental Impact	19% Increase distance/steepness	19% Increase distance/steepness	21% Mental health
19% Environmental Impact	21% Mental health	16% Environmental Impact		21% Tech of the future	17% Environmental Impact	16% Environmental Impact	17% Environmental Impact
15% Tech of the future	20% Tech of the future	10% Makes travel time predictable		19% Mental health	16% Tech of the future	13% Tech of the future	13% Makes travel time predictable
12% Makes travel time predictable	13% Makes travel time predictable	9% Tech of the future		10% Makes travel time predictable	11% Makes travel time predictable	9% Makes travel time predictable	12% Tech of the future
2% Keep up with other riders	3% Keep up with other riders	2% Keep up with other riders		1% Keep up with other riders	3% Keep up with other riders	4% Keep up with other riders	2% Keep up with other riders

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(C) Physical health = It would allow me to undertake an activity that is good for my physical health **(D)** Mental Health = It would allow me to undertake an activity that is good for my mental health
(E) Less effort = It looks like less effort ""than normal"" cycling which means I could arrive less sweaty or less tired at my destination
(F) Save time on travel = It could save me time on my travel **(G)** Makes travel time predictable = It could make my travel time more predictable
(H) Tech of the future = I think all bikes in the future will be e-bikes and I want to adopt this new technology now
(I) Keep up with other riders = It would enable me to keep up with other riders **(J)** Increase distance/steepness = I could increase the distance or the steepness of places I can ride to

GERMANY	Gender		Age				
Overall	**Male**	**Female**	**18-24p**	**25-34**	**35-44**	**45-54**	**55+**
32% increase distance/steepness	36% Less effort	33% increase distance/steepness	35% save time on travel	30% less effort	36% increase distance/steepness	35% less effort	39% Less effort than normal
34% look like less effort	31% increase distance/steepness	31% less effort	25% environmental impact	26% increase distance/steepness	32% less effort	28% increase distance/steepness	37% increase distance or steepness
27% physically active	28% physical activity	26% physical health	22% increase distance/steepness	23% Environmental Impact	27% physical activity	27% physical health	34% physical activity
21% save time on travel	21% Save travel time	21% save time on travel	18% less effort	22% physical activity	26% mental health	20% save money on travel	17% save time on travel
17% mental health	18% mental health	15% mental health	16% save me money	21% save time on travel	26% save time on travel	20% mental health	12% Mental Health
14% Environmental Impact	16% Environmental Impact	12% Save Me Money	16% Keep up with other riders	17% Makes travel time predictable	18% Save Me Money	18% Save me time	11% keep up with other riders
14% Save Me Money	15% Save Me Money	11% Environmental Impact	14% Makes travel time predictable	16% Save Me Money	13% Makes travel time predictable	13% Tech of The Future	9% Tech of The Future
12% Keep up with other riders	13% Keep up with other riders	11% Keep up with other riders	12% Physical Health	15% Keep up with other riders	11% Environmental Impact	12% Environmental Impact	9% Environmental Impact
11% Makes travel time predictable	11% Tech of The Future	10% Makes travel time predictable	12% Mental Health	15% Mental Health	10% Keep up with other riders	11% Keep up with other riders	8% Makes travel time predictable
10% Tech of the Future	11% Makes travel time predictable	9% Tech of The Future	7% Tech of The Future	12% Tech of The Future	9% Tech of The Future	7% Makes travel time predictable	7% Save Me Money

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(F) Save time on travel = It could save me time on my travel **(G)** Makes travel time predictable = It could make my travel time more predictable
(H) Tech of the future = I think all bikes in the future will be e-bikes and I want to adopt this new technology now
(I) Keep up with other riders = It would enable me to keep up with other riders **(J)** Increase distance/steepness = I could increase the distance or the steepness of places I can ride to

FRANCE	Gender		Age				
Overall	**Male**	**Female**	**18-24p**	**25-34**	**35-44**	**45-54**	**55+**
38% physically active	35% physically active	42% physically active	Not enough respondents	28% environmental impact	41% increase the distance/steepness	39% look like less effort	51% physically active
34% increase the distance/steepness	35% increase the distance/steepness	32% increase the distance/steepness		26% save me money	28% physically active	35% physically active	36% increase the distance/steepness
31% look like less effort	33% look like less effort	30% look like less effort		22% increase the distance/steepness	21% look like less effort	30% increase the distance/steepness	35% look like less effort
24% environmental impact	22% environmental impact	26% environmental impact		18% save time on travel	21% environmental impact	27% environmental impact	25% mental health
21% mental health	21% mental health	21% mental health		18% physically active	18% mental health	24% save time on travel	21% environmental impact
17% Save time on travel	18% Save time on travel	16% Save time on travel		16% Less effort	15% Save me money	21% Save me money	13% Save time on travel
16% Save me money	16% Save me money	16% Save me money		12% Mental health	13% Save time on travel	17% Mental health	11% Save me money
10% Tech of the future	10% Tech of the future	10% Tech of the future		12% Tech of the future	8% Tech of the future	11% Tech of the future	9% Tech of the future
8% Keep up with other riders	10% Keep up with other riders	7% Keep up with other riders		10% Keep up with other riders	8% Keep up with other riders	6% Makes travel time predictable	7% Keep up with other riders
7% Makes travel time predictable	8% Makes travel time predictable	6% Makes travel time predictable		10% Makes travel time predictable	8% Makes travel time predictable	5% Keep up with other riders	5% Makes travel time predictable

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(H) Tech of the future = I think all bikes in the future will be e-bikes and I want to adopt this new technology now
(I) Keep up with other riders = It would enable me to keep up with other riders **(J)** Increase distance/steepness = I could increase the distance or the steepness of places I can ride to

NETHERLANDS	Gender		Age				
Overall	**Male**	**Female**	**18-24p**	**25-34**	**35-44**	**45-54**	**55+**
39% less effort	38% Less Effort	42% less effort	31% less effort	38% Increase distance/steepness	34% Less Effort	40% Less Effort	48% Increase distance/steepness
38% Increase distance/steepness	35% Increase distance/steepness	41% Increase distance/steepness	29% Increase distance/steepness	37% Less Effort	31% Increase distance/steepness	33% Increase distance/steepness	47% Less Effort
29% Physical health	38% Physical health	28% Save me money	28% Time more predictable	30% Save Me Money	29% Physical Health	33% Physical Health	38% Physical Health
26% Save me money	34% Mental health	27% Physical health	27% Save Me Money	28% Save me time	28% Save time on travel	30% Save Me Money	34% Mental Health
24% Mental health	25% Save Me Money	26% Save time on travel	25% Environmental Impact	22% Physical Health	27% Mental Health	22% Mental Health	21% Save me time
22% Save me time	20% Save me time	20% Mental Health	23% Save me time	18% Time more predictable	23% Save me time	18% Save me time	20% Save Me Money
15% Environmental Impact	18% Environmental Impact	14% Time more predictable	19% Physical Health	16% Tech of The Future	16% Environmental Impact	13% Tech of The Future	14% Environmental Impact
15% Time more predictable	18% Tech of The Future	12% Environmental Impact	14% Tech of The Future	16% Mental Health	15% Time more predictable	11% Environmental Impact	13% Tech of The Future
13% Tech of The Future	16% Time more predictable	8% Keep up with other riders	12% Mental Health	14% Environmental Impact	9% Tech of The Future	10% Time more predictable	12% Time more predictable
8% Keep up with other riders	8% Keep up with other riders	7% Tech of The Future	8% Keep up with other riders	9% Keep up with other riders	7% Keep up with other riders	7% Keep up with other riders	9% Keep up with other riders

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(I) Keep up with other riders = It would enable me to keep up with other riders **(J)** Increase distance/steepness = I could increase the distance or the steepness of places I can ride to

SPAIN	Gender		Age				
Overall	**Male**	**Female**	**18-24p**	**25-34**	**35-44**	**45-54**	**55+**
33% Physical health	35% Increase distance/steepness	34% Save time on travel	Not enough respondents	37% less effort	40% Save time on travel	30% Increase distance/steepness	47% Physical health
30% Save time on travel	33% Physical health	32% Physical health		31% Save time on travel	26% less effort	29% Physical health	34% Increase distance/steepness
30% Increase distance/steepness	30% Environmental Impact	31% less effort		28% Environmental Impact	26% Increase distance/steepness	29% Save me money	30% Environmental Impact
29% less effort	27% less effort	25% Save me money		27% Increase distance/steepness	25% Environmental Impact	26% Save time on travel	28% less effort
27% Environmental Impact	27% Save time on travel	25% Mental health		22% Physical health	24% Physical health	26% less effort	24% Mental health
24% Save me money	24% Save me money	24% Increase distance/steepness		19% Save me money	24% Save me money	23% Mental health	23% Save time on travel
22% Mental health	19% Mental health	24% Environmental Impact		15% Mental health	18% Mental health	21% Environmental Impact	21% Save me money
15% Makes travel time predictable	16% Makes travel time predictable	15% Makes travel time predictable		14% Makes travel time predictable	16% Tech of the future	14% Makes travel time predictable	16% Makes travel time predictable
14% Tech of the future	16% Tech of the future	11% Tech of the future		11% Tech of the future	15% Makes travel time predictable	10% Tech of the future	16% Tech of the future
6% Keep up with other riders	7% Keep up with other riders	5% Keep up with other riders		7% Keep up with other riders	4% Keep up with other riders	6% Keep up with other riders	7% Keep up with other riders

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(H) Tech of the future = I think all bikes in the future will be e-bikes and I want to adopt this new technology now
(I) Keep up with other riders = It would enable me to keep up with other riders **(J)** Increase distance/steepness = I could increase the distance or the steepness of places I can ride to

NORWAY	Gender		Age				
Overall	**Male**	**Female**	**18-24p**	**25-34**	**35-44**	**45-54**	**55+**
44% Increase distance/steepness	37% Increase distance/steepness	51% Increase distance/steepness	Not enough respondents	44% Increase distance/steepness	44% Increase distance/steepness	50% Increase distance/steepness	49% Increase distance/steepness
39% Physical health	34% Physical health	45% Physical health		37% Save me money	36% Physical health	44% Physical health	48% Physical health
35% less effort	33% less effort	36% less effort		36% less effort	32% less effort	36% less effort	33% less effort
25% Save me money	23% Mental health	28% Mental health		34% Physical health	26% Mental health	31% Save me money	23% Mental health
25% Mental health	23% Save me money	27% Save me money		32% Save time on travel	25% Save me money	30% Mental health	15% Save me money
19% Save time on travel	20% Save time on travel	18% Save time on travel		27% Mental Health	21% Save me time	21% Save me time	10% Save me time
11% Environmental Impact	13% Tech of The Future			14% Tech of The Future	12% Tech of The Future	13% Environmental Impact	7% Time more predictable
11% Time more predictable	11% Time more predictable	11% Time more predictable		12% Time more predictable	12% Time more predictable	9% Time more predictable	7% Keep up with other riders
10% Tech of The Future	9% Keep up with other riders	8% Keep up with other riders		10% Environmental Impact	12% Environmental Impact	8% Keep up with other riders	6% Environmental Impact
8% Keep up with other riders	9% Environmental Impact	7% Tech of The Future		10% Keep up with other riders	9% Keep up with other riders	5% Tech of The Future	6% Tech of The Future

ANSWERS KEY:
(A) Environmental Impact = I am concerned about the environmental impact of motor vehicle travel **(B)** Save me money = It could save me money on my travel
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(E) Less effort = It looks like less effort ""than normal"" cycling which means I could arrive less sweaty or less tired at my destination
(F) Save time on travel = It could save me time on my travel **(G)** Makes travel time predictable = It could make my travel time more predictable
(H) Tech of the future = I think all bikes in the future will be e-bikes and I want to adopt this new technology now
(I) Keep up with other riders = It would enable me to keep up with other riders **(J)** Increase distance/steepness = I could increase the distance or the steepness of places I can ride to

SWEDEN	Gender		Age				
Overall	**Male**	**Female**	**18-24p**	**25-34**	**35-44**	**45-54**	**55+**
44% Increase distance/steepness	38% Increase distance/steepness	51% Increase distance/steepness	Not enough respondents	52% Increase distance/steepness	34% Increase distance/steepness	45% Increase distance/steepness	45% Increase distance/steepness
31% less effort	26% less effort	37% less effort		36% Save me money	33% less effort	31% less effort	30% less effort
27% Physical health	24% Physical health	30% Physical health		32% less effort	26% Environmental Impact	25% Save me money	30% Physical health
22% Save me money	20% Save me money	23% Save me money		32% Physical health	22% Physical health	25% Save time on travel	13% Mental health
20% Save time on travel	20% Save time on travel	21% Save time on travel		29% Save time on travel	19% Makes travel time predictable	22% Physical health	9% Save me money
17% Mental health	18% Mental health	16% Environmental Impact]		23% Makes travel time predictable	18% Save me money	21% Mental health	8% Save time on travel
16% Environmental Impact	18% Makes travel time predictable	15% Mental health		18% Environmental Impact	14% Save time on travel	12% Makes travel time predictable	8% Makes travel time predictable
16% Makes travel time predictable	16% Environmental Impact	13% Makes travel time predictable		16% Mental health	13% Mental health	10% Tech of the future	6% Environmental Impact
9% Tech of the future	8% Tech of the future	11% Tech of the future		16% Tech of the future	6% Tech of the future	6% Environmental Impact	5% Tech of the future
3% Keep up with other riders	2% Keep up with other riders	5% Keep up with other riders		7% Keep up with other riders	5% Keep up with other riders	2% Keep up with other riders	0% Keep up with other riders

ANSWERS KEY:
(A) Environmental Impact = I am concerned about the environmental impact of motor vehicle travel **(B)** Save me money = It could save me money on my travel
(C) Physical health = It would allow me to undertake an activity that is good for my physical health **(D)** Mental Health = It would allow me to undertake an activity that is good for my mental health
(E) Less effort = It looks like less effort ""than normal"" cycling which means I could arrive less sweaty or less tired at my destination
(F) Save time on travel = It could save me time on my travel **(G)** Makes travel time predictable = It could make my travel time more predictable
(H) Tech of the future = I think all bikes in the future will be e-bikes and I want to adopt this new technology now
(I) Keep up with other riders = It would enable me to keep up with other riders **(J)** Increase distance/steepness = I could increase the distance or the steepness of places I can ride to

DENMARK	Gender		Age				
Overall	**Male**	**Female**	**18-24p**	**25-34**	**35-44**	**45-54**	**55+**
36% Increase distance/steepness	32% Increase distance/steepness	39% Increase distance/steepness	Not enough respondents	27% Save me money	Not enough respondents	38% Increase distance/steepness	42% Increase distance/steepness
26% Physical health	29% Physical health	24% Physical health		23% Mental health		37% less effort	33% Physical health
26% less effort	28% less effort	24% less effort		21% Increase distance/steepness		32% Physical health	26% Mental health
20% Mental health	19% Mental health	21% Mental health		21% less effort		15% Save me money	19% less effort
16% Save me money	15% Save me money	17% Save me money		20% Save time on travel		14% Mental health	11% Environmental Impact
13% Save time on travel	14% Save time on travel	12% Environmental Impact		19% Physical health		8% Save time on travel	7% Tech of the future
12% Environmental Impact	13% Environmental Impact	11% Save time on travel		16% Environmental Impact		8% Environmental Impact	7% Makes travel time predictable
9% Makes travel time predictable	9% Tech of the future	9% Makes travel time predictable		11% Makes travel time predictable		6% Keep up with other riders	6% Save me money
7% Tech of the future	8% Makes travel time predictable	6% Keep up with other riders		9% Keep up with other riders		5% Tech of the future	6% Keep up with other riders
7% Keep up with other riders	7% Keep up with other riders	4% Tech of the future		8% Tech of the future		3% Makes travel time predictable	5% Save time on travel

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(E) Less effort = It looks like less effort ""than normal"" cycling which means I could arrive less sweaty or less tired at my destination
(F) Save time on travel = It could save me time on my travel **(G)** Makes travel time predictable = It could make my travel time more predictable
(H) Tech of the future = I think all bikes in the future will be e-bikes and I want to adopt this new technology now
(I) Keep up with other riders = It would enable me to keep up with other riders **(J)** Increase distance/steepness = I could increase the distance or the steepness of places I can ride to

POLAND	Gender		Age				
Overall	**Male**	**Female**	**18-24p**	**25-34**	**35-44**	**45-54**	**55+**
32% Less effort	32% Increase distance/steepness	35% Less effort	Not enough respondents	31% Save time on travel	41% Increase distance/steepness	34% Less effort	35% Less effort
30% Increase distance/steepness	29% Less effort	29% Increase distance/steepness		29% Less effort	30% Less effort	26% Physical health	26% Physical health
24% Save time on travel	27% Physical health	28% Save time on travel		29% Increase distance/steepness	24% Physical health	25% Increase distance/steepness	26% Increase distance/steepness
23% Physical health	24% Mental health	21% Physical health		23% Mental health	24% Mental health	23% Save time on travel	22% Mental health
22% Mental health	20% Save time on travel	20% Mental health		21% Physical health	24% Save time on travel	21% Mental health	21% Save time on travel
17% Tech of the future	19% Tech of the future	15% Makes travel time predictable		16% Save me money	21% Makes travel time predictable	21% Tech of the future	16% Environmental Impact
14% Makes travel time predictable	14% Environmental Impact	15% Tech of the future		16% Tech of the future	21% Tech of the future	11% Makes travel time predictable	14% Tech of the future
14% Environmental Impact	13% Save me money	14% Environmental Impact		16% Environmental Impact	13% Save me money	10% Save me money	12% Makes travel time predictable
12% Save me money	13% Makes travel time predictable	11% Save me money		13% Makes travel time predictable	12% Environmental Impact	9% Keep up with other riders	9% Save me money
8% Keep up with other riders	11% Keep up with other riders	6% Keep up with other riders		9% Keep up with other riders	6% Keep up with other riders	5% Environmental Impact	8% Keep up with other riders

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(F) Save time on travel = It could save me time on my travel **(G)** Makes travel time predictable = It could make my travel time more predictable
(H) Tech of the future = I think all bikes in the future will be e-bikes and I want to adopt this new technology now
(I) Keep up with other riders = It would enable me to keep up with other riders **(J)** Increase distance/steepness = I could increase the distance or the steepness of places I can ride to

SWITZERLAND	Gender		Age				
Overall	**Male**	**Female**	**18-24p**	**25-34**	**35-44**	**45-54**	**55+**
23% Physical health	23% Physical health	23% Physical health	22% Physical health	23% Save time on travel	22% Increase distance/steepness	21% Physical health	32% Physical health
20% Increase distance/steepness	22% Increase distance/steepness	19% Mental health	22% Keep up with other riders	21% Tech of the future	21% less effort	19% Increase distance/steepness	26% Mental health
19% Mental health	20% less effort	18% Increase distance/steepness	20% Increase distance/steepness	19% Save me money	18% Physical health	17% Mental health	23% Increase distance/steepness
19% less effort	19% Mental health	18% less effort	20% less effort	17% Increase distance/steepness	15% Save time on travel	16% less effort	21% Environmental Impact
17% Environmental Impact	19% Tech of the future	18% Environmental Impact	16% Environmental Impact	17% less effort	15% Mental health	16% Environmental Impact	20% less effort
16% Save time on travel	16% Environmental Impact	15% Save time on travel	16% Save time on travel	15% Keep up with other riders	14% Tech of the future	14% Save time on travel	16% Tech of the future
15% Tech of the future	16% Save time on travel	15% Save me money	15% Makes travel time predictable	14% Mental health	14% Environmental Impact	11% Save me money	13% Save time on travel
13% Save me money	12% Save me money	12% Keep up with other riders	14% Tech of the future	13% Physical health	13% Save me money	10% Tech of the future	12% Save me money
10% Keep up with other riders	11% Makes travel time predictable	11% Tech of the future	11% Mental health	12% Environmental Impact	12% Keep up with other riders	6% Keep up with other riders	6% Keep up with other riders
9% Makes travel time predictable	8% Keep up with other riders	6% Makes travel time predictable	8% Save me money	12% Makes travel time predictable	9% Makes travel time predictable	6% Makes travel time predictable	6% Makes travel time predictable

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(H) Tech of the future = I think all bikes in the future will be e-bikes and I want to adopt this new technology now
(I) Keep up with other riders = It would enable me to keep up with other riders **(J)** Increase distance/steepness = I could increase the distance or the steepness of places I can ride to

Barriers to buying an e-bike - which of the following would be a reason NOT to buy an e-bike?

EUROPE	Gender		Age				
Overall	**Male**	**Female**	**18-24p**	**25-34**	**35-44**	**45-54**	**55+**
40% Expensive	42% Expensive	39% Expensive	45% Expensive	44% Expensive	42% Expensive	41% Expensive	37% Expensive
19% Don't like cycling	21% Fitness wouldn't improve	21% Don't like cycling	25% Fitness wouldn't improve	32% Don't like cycling	21% Fitness wouldn't improve	19% Fitness wouldn't improve	20% Don't like cycling
19% Fitness wouldn't improve	17% lack of safe storage at home/work	17% Fitness wouldn't improve	21% lack of safe storage at home/work	21% lack of safe storage at home/work	17% lack of safe storage at home/work	17% Don't like cycling	16% Fitness wouldn't improve
16% lack of safe storage at home/work	16% Don't like cycling	16% lack of safe storage at home/work	20% Cheating	20% Don't know enough	16% Don't like cycling	16% lack of safe storage at home/work	14% lack of safe storage at home/work
13% Cheating	15% Cheating	12% Can't store at home	18% Don't like cycling	18% wouldn't feel safe riding	14% Cheating	13% Cheating	13% wouldn't feel safe riding
12% Can't store at home	11% Can't store at home	12% wouldn't feel safe riding	14% Can't store at home	17% Fitness wouldn't improve	11% Don't know enough	11% Can't store at home	11% Cheating
11% wouldn't feel safe riding	9% wouldn't feel safe riding	11% Cheating	13% Don't know enough	16% Can't store at home	11% Can't store at home	9% wouldn't feel safe riding	11% Can't store at home
10% Don't know enough	8% Don't know enough	11% Don't know enough	10% For older people	14% Cheating	8% wouldn't feel safe riding	8% Don't know enough	8% Don't know enough
5% For older people	7% For older people	4% For older people	9% wouldn't feel safe riding	3% For older people	7% For older people	5% For older people	3% For older people

ANSWERS KEY:
(A) Don't know enough = I don't know enough about e-bikes **(B)** Don't like cycling = I don't like cycling in general
(C) Cheating = E-bikes are a cheat compared to using regular bikes (e.g. it is not your own pedal power **(D)** For older people= E-bikes are for older people
(E) Fitness wouldn't improve = My fitness would not improve (e.g . because I would not be pushing myself enough) **(F)** Expensive = E-bikes are too expensive
(G) Wouldn't feel safe riding = I wouldn't feel safe to ride one (e.g. due to a lack of cycling infrastructure in my town / city)
(H) Lack of safe storage at home/work = There is a lack of safe bike storage at home, work or public areas and it is just too expensive to leave on the street
(I) Can't store at home = I cannot store this type of bike in my place (e.g. because it is too big to leave in my entrance, doorway etc.)

UK	Gender		Age				
Overall	**Male**	**Female**	**18-24p**	**25-34**	**35-44**	**45-54**	**55+**
35% Expensive	38% Expensive	32% Expensive	43% Expensive	40% Expensive	37% Expensive	35% Expensive	30% Expensive
27% Don't like cycling	22% Don't like cycling	31% Don't like cycling	25% Don't like cycling	32% Don't like cycling	26% Don't like cycling	25% Don't like cycling	26% Don't like cycling
19% wouldn't feel safe riding	19% Fitness wouldn't improve	22% wouldn't feel safe riding	23% Fitness wouldn't improve	21% lack of safe storage at home/work	21% Fitness wouldn't improve	19% Fitness wouldn't improve	23% wouldn't feel safe riding
17% lack of safe storage at home/work	17% lack of safe storage at home/work	16% Don't know enough	20% Don't know enough	20% Don't know enough	19% lack of safe storage at home/work	18% wouldn't feel safe riding	15% lack of safe storage at home/work
16% Fitness wouldn't improve	16% wouldn't feel safe riding	16% lack of safe storage at home/work	20% Cheating	18% wouldn't feel safe riding	16% Don't know enough	16% lack of safe storage at home/work	13% Can't store at home
14% Don't know enough	13% Cheating	14% Fitness wouldn't improve	16% lack of safe storage at home/work	17% Fitness wouldn't improve	16% Cheating	14% Can't store at home	11% Fitness wouldn't improve
13% Can't store at home	12% Can't store at home	14% Can't store at home	14% Can't store at home	16% Can't store at home	14% Wouldn't feel safe riding	9% Don't know enough	10% Don't know enough
11% Cheating	11% Don't know enough	9% Cheating	12% Wouldn't feel safe riding	14% Cheating	10% Can't store at home	9% Cheating	6% Cheating
2% For older people	3% For older people	1% For older people	3% For older people	3% For older people	3% For older people	1% For older people	1% For older people

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(G) Wouldn't feel safe riding = I wouldn't feel safe to ride one (e.g. due to a lack of cycling infrastructure in my town / city)
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(I) Can't store at home = I cannot store this type of bike in my place (e.g. because it is too big to leave in my entrance, doorway etc.)

ITALY	Gender		Age				
Overall	**Male**	**Female**	**18-24p**	**25-34**	**35-44**	**45-54**	**55+**
37% Expensive	42% Expensive	33% Expensive	32% Lack of safe storage at home/work	38% Expensive	44% Expensive	35% Expensive	37% Expensive
22% Lack of safe storage at home/work	23% Lack of safe storage at home/work	22% Lack of safe storage at home/work	30% Expensive	28% Lack of safe storage at home/work	18% Lack of safe storage at home/work	20% Lack of safe storage at home/work	21% Lack of safe storage at home/work
17% Don't like cycling	16% Fitness wouldn't improve	18% Don't like cycling	23% Don't like cycling	21% Don't like cycling	15% Don't like cycling	18% Fitness wouldn't improve	16% Don't like cycling
15% Wouldn't feel safe riding	15% Don't like cycling	15% Wouldn't feel safe riding	16% Don't know enough	19% Wouldn't feel safe riding	14% Can't store at home	16% Don't like cycling	16% Wouldn't feel safe riding
14% Fitness wouldn't improve	14% Wouldn't feel safe riding	12% Fitness wouldn't improve	13% Can't store at home	14% Fitness wouldn't improve	13% Fitness wouldn't improve	15% Wouldn't feel safe riding	14% Fitness wouldn't improve
12% Can't store at home	12% Can't store at home	12% Can't store at home	12% Cheating	12% Don't know enough	11% Don't know enough	9% Can't store at home	13% Can't store at home
10% Don't know enough	11% Cheating	11% Don't know enough	11% Wouldn't feel safe riding	12% Cheating	9% Wouldn't feel safe riding	6% Don't know enough	10% Cheating
9% Cheating	8% Don't know enough	8% Cheating	11% Fitness wouldn't improve	12% Can't store at home	7% Cheating	6% For older people	9% Don't know enough
4% For older people	5% For older people	4% For older people	5% For older people	3% For older people	3% For older people	4% Cheating	5% For older people

ANSWERS KEY:
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(C) Cheating = E-bikes are a cheat compared to using regular bikes (e.g. it is not your own pedal power **(D)** For older people= E-bikes are for older people
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GERMANY	Gender		Age				
Overall	**Male**	**Female**	**18-24p**	**25-34**	**35-44**	**45-54**	**55+**
48% Expensive	48% Expensive	47% Expensive	53% Expensive	46% Expensive	52% Expensive	52% Expensive	44% Expensive
20% Cheating	23% cheating	20% don't like cycling	25% cheating	25% Cheating	19% fitness wouldn't improve	20% Cheating	20% Don't like cycling
19% fitness wouldn't improve	23% fitness wouldn't improve	17% cheating	22% fitness wouldn't improve	23% lack of ssafe storage at home/work	18% cheating	19% fitness wouldn't improve	18% cheating
18% don't like cycling generally	17% lack iof safe storage at home/work	16% fitness wouldn't improve	21% don't like cycling	23%fitness wouldn't improve	14% don't like cycling	16% lack of safe storage at home/ work	18% fitness wouldn'rt improve
16% lack of safe bike storage at home/work	16% don't like cycling	14% lack iof safe storage at home/work	20% lack of safe storage at home/work	16% don't like cycling	13% they're for older people	16% don't like cycling	13% lack of safe storage at home/work
11% Can't store at home	9% Can't store at home	14% Can't store at home	18% For older people	13% Can't store at home	13% lack of safe storage at home/work	11% Can't store at home	12% Can't store at home
8% For older people	9% For older people	9% Wouldn't feel safe riding	10% Don't know enough	12% For older people	10% Can't store at home	6% Don't know enough	10% Wouldn't feel safe riding
8% Wouldn't feel safe riding	7% Wouldn't feel safe riding	6% For older people	8% Can't store at home	8% Don't know enough	5% Don't know enough	6% Wouldn't feel safe riding	5% Don't know enough
6% Don't know enough	6% Don't know enough	6% Don't know enough	6% Wouldn't feel safe riding	8% Wouldn't feel safe riding	5% Wouldn't feel safe riding	5% For older people	3% For older people

ANSWERS KEY:
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(C) Cheating = E-bikes are a cheat compared to using regular bikes (e.g. it is not your own pedal power **(D)** For older people= E-bikes are for older people
(E) Fitness wouldn't improve = My fitness would not improve (e.g . because I would not be pushing myself enough) **(F)** Expensive = E-bikes are too expensive
(G) Wouldn't feel safe riding = I wouldn't feel safe to ride one (e.g. due to a lack of cycling infrastructure in my town / city)
(H) Lack of safe storage at home/work = There is a lack of safe bike storage at home, work or public areas and it is just too expensive to leave on the street
(I) Can't store at home = I cannot store this type of bike in my place (e.g. because it is too big to leave in my entrance, doorway etc.)

FRANCE	Gender		Age				
Overall	**Male**	**Female**	**18-24p**	**25-34**	**35-44**	**45-54**	**55+**
46% Expensive	49% Expensive	43% Expensive	47% Expensive	47% Expensive	41% Expensive	49% Expensive	46% Expensive
18% don't like cycling generally	17% lack of safe bike storage at home/work	22% don't like cycling generally	28% fitness wouldn't improve	22% don't like cycling generally	16% they're cheating	18% Don't like cycling	18% Don't like cycling
14% lack of safe bike storage at home/work	16% fitness wouldn't improve	13% Can't store at home	20% don't like cycling generally	18% lack of safe bike storage at home/work	15% don't like cycling generally	15% Lack of safe storage at home/work	13% Wouldn't feel safe riding
13% fitness wouldn't improve	15% Cheating	12% lack of safe bike storage at home/work	19% Can't store at home	17% fitness wouldn't improve	14% lack of safe bike storage at home/work	13% Can't store at home	11% Lack of safe storage at home/work
13% Can't store at home	14% don't like cycling generally	11% fitness wouldn't improve	18% Cheating	15% Can't store at home	12% fitness wouldn't improve	12% Cheating	10% Can't store at home
12% Cheating	12% Can't store at home	11% Wouldn't feel safe riding	18% lack of safe bike storage at home/work	13% Cheating	12% Can't store at home	11% Fitness wouldn't improve	9% Cheating
9% Wouldn't feel safe riding	9% Don't know enough	10% Cheating	11% Wouldn't feel safe riding	8% Don't know enough	11% Don't know enough	8% Don't know enough	9% Fitness wouldn't improve
7% Don't know enough	7% Wouldn't feel safe riding	6% Don't know enough	8% Don't know enough	5% For older people	8% Wouldn't feel safe riding	6% Wouldn't feel safe riding	5% Don't know enough
4% For older people	5% For older people	3% For older people	8% For older people	4% Wouldn't feel safe riding	4% For older people	4% For older people	2% For older people

ANSWERS KEY:
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(I) Can't store at home = I cannot store this type of bike in my place (e.g. because it is too big to leave in my entrance, doorway etc.)

NETHERLANDS	Gender		Age				
Overall	**Male**	**Female**	**18-24p**	**25-34**	**35-44**	**45-54**	**55+**
50% Expensive	46% Expensive	54% Expensive	52% Expensive	57% Expensive	57% Expensive	55% Expensive	42% Expensive
28% Fitness wouldn't improve	29% Fitness wouldn't improve	27% Fitness wouldn't improve	35% Fitness wouldn't improve	40% Fitness wouldn't improve	25% Fitness wouldn't improve	27% Fitness wouldn't improve	23% Fitness wouldn't improve
11% Don't like cycling	11% Don't like cycling	12% Don't like cycling	27% For older people	15% Cheating	19% Lack of safe storage at home/work	12% Cheating	12% Don't like cycling
11% For older people	11% For older people	12% lack of safe storage at home/work	22% Cheating	14% For older people	13% For older people	11% Lack of safe storage at home/work	7% Wouldn't feel safe riding
10% Cheating	11% Cheating	11% For older people	15% Don't like cycling	14% Lack of safe storage at home/work	11% Don't like cycling	8% For older people	6% For older people
10% Lack of safe storage at home/work	9% Lack of safe storage at home/work	9% Cheating	15% lack of safe bike storage at home/work	13% Don't like cycling	9% Can't store at home	8% Don't like cycling	6% Don't know enough]
7% Don't know enough	5% Wouldn't feel safe riding	9% Don't know enough about ebikes	14% Don't know enough	11% Can't store at home	8% Cheating	7% Don't know enough	5% Cheating
6% Wouldn't feel safe riding	5% Don't know enough	8% Can't store at home	9% Can't store at home	6% Don't know enough	6% Wouldn't feel safe riding	5% Can't store at home	5% lack of safe bike storage at home/work
6% Can't store at home	4% Can't store at home	6% Wouldn't feel safe riding	8% Wouldn't feel safe riding	5% Wouldn't feel safe riding	5% Don't know enough	3% Wouldn't feel safe riding	3% Can't store at home

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(E) Fitness wouldn't improve = My fitness would not improve (e.g . because I would not be pushing myself enough) **(F)** Expensive = E-bikes are too expensive
(G) Wouldn't feel safe riding = I wouldn't feel safe to ride one (e.g. due to a lack of cycling infrastructure in my town / city)
(H) Lack of safe storage at home/work = There is a lack of safe bike storage at home, work or public areas and it is just too expensive to leave on the street
(I) Can't store at home = I cannot store this type of bike in my place (e.g. because it is too big to leave in my entrance, doorway etc.)

SPAIN	Gender		Age				
Overall	**Male**	**Female**	**18-24p**	**25-34**	**35-44**	**45-54**	**55+**
29% Expensive	34% Expensive	30% Don't like cycling	39% Expensive	36% Expensive	33% Expensive	25% Don't like cycling	30% Don't like cycling
25% Don't like cycling	20% Lack of safe storage at home/work	24% Expensive	31% Fitness wouldn't improve	26% Lack of safe storage at home/work	23% Fitness wouldn't improve	25% Can't store at home	25% Expensive
21% Lack of safe storage at home/work	20% Fitness wouldn't improve	22% Lack of safe storage at home/work	27% Lack of safe storage at home/work	24% Fitness wouldn't improve	20% Lack of safe storage at home/work	23% Expensive	18% Lack of safe storage at home/work
18% Fitness wouldn't improve	19% Don't like cycling	18% Can't store at home	23% Don't like cycling	24% Don't like cycling	17% Don't like cycling	21% Lack of safe storage at home/work	16% Can't store at home
18% Can't store at home	19% Can't store at home	17% Fitness wouldn't improve	16% Can't store at home	22% Can't store at home	14% Can't store at home	17% Fitness wouldn't improve	15% Wouldn't feel safe riding
12% Don't know enough	11% Wouldn't feel safe riding	13% Wouldn't feel safe riding	13% Don't know enough	12% Don't know enough	10% Cheating	13% Don't know enough	12% Fitness wouldn't improve
12% Wouldn't feel safe riding	11% Don't know enough	12% Don't know enough	10% Wouldn't feel safe riding	8% Wouldn't feel safe riding	9% Don't know enough	13% Wouldn't feel safe riding	12% Don't know enough
6% Cheating	9% Cheating	3% Cheating	9% Cheating	5% Cheating	9% Wouldn't feel safe riding	9% Cheating	3% Cheating
2% For older people	3% For older people	0% For older people	0% For older people	4% For older people	1% For older people	3% For older people	1% For older people

ANSWERS KEY:
(A) Don't know enough = I don't know enough about e-bikes **(B)** Don't like cycling = I don't like cycling in general
(C) Cheating = E-bikes are a cheat compared to using regular bikes (e.g. it is not your own pedal power **(D)** For older people= E-bikes are for older people
(E) Fitness wouldn't improve = My fitness would not improve (e.g . because I would not be pushing myself enough) **(F)** Expensive = E-bikes are too expensive
(G) Wouldn't feel safe riding = I wouldn't feel safe to ride one (e.g. due to a lack of cycling infrastructure in my town / city)
(H) Lack of safe storage at home/work = There is a lack of safe bike storage at home, work or public areas and it is just too expensive to leave on the street
(I) Can't store at home = I cannot store this type of bike in my place (e.g. because it is too big to leave in my entrance, doorway etc.)

NORWAY	Gender		Age				
Overall	**Male**	**Female**	**18-24p**	**25-34**	**35-44**	**45-54**	**55+**
46% Expensive	47% Expensive	44% Expensive	40% Expensive	49% Expensive	50% Expensive	53% Expensive	40% Expensive
20% Don't like cycling	19% Fitness wouldn't improve	22% Don't like cycling	27% Lack of safe storage at home/work	18% Fitness wouldn't improve	24% Fitness wouldn't improve	18% Don't like cycling	27% Don't like cycling
17% Fitness wouldn't improve	17% Don't like cycling	14% Fitness wouldn't improve	22% Can't store at home	18% Cheating	16% Don't like cycling	17% Fitness wouldn't improve	12% Fitness wouldn't improve
12% Cheating	13% Cheating	12% Lack of safe storage at home/work	17% Fitness wouldn't improve	16% Lack of safe storage at home/work	12% Cheating	10% Lack of safe storage at home/work	10% Cheating
12% Lack of safe storage at home/work	12% Lack of safe storage at home/work	11% Cheating	16% Cheating	15% Can't store at home	12% Lack of safe storage at home/work	8% Cheating	8% Lack of safe storage at home/work
10% I cannot store this type of bike in my place	12% Can't store at home	9% Can't store at home	15% Don't like cycling	13% Don't like cycling	8% Can't store at home	8% Can't store at home	6% Can't store at home
7% Don't know enough	8% Don't know enough	6% Don't know enough	12% Wouldn't feel safe riding	10% Don't know enough	6% For older people	6% Wouldn't feel safe riding	6% Don't know enough
6% Wouldn't feel safe riding	6% Wouldn't feel safe riding	6% Wouldn't feel safe riding	9% Don't know enough	7% Wouldn't feel safe riding	5% Don't know enough	4% For older people	4% Wouldn't feel safe riding
4% For older people	6% For older people	2% For older people	5% For older people	6% For older people	4% Wouldn't feel safe riding	4% Don't know enough	2% For older people

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(E) Fitness wouldn't improve = My fitness would not improve (e.g . because I would not be pushing myself enough) **(F)** Expensive = E-bikes are too expensive
(G) Wouldn't feel safe riding = I wouldn't feel safe to ride one (e.g. due to a lack of cycling infrastructure in my town / city)
(H) Lack of safe storage at home/work = There is a lack of safe bike storage at home, work or public areas and it is just too expensive to leave on the street
(I) Can't store at home = I cannot store this type of bike in my place (e.g. because it is too big to leave in my entrance, doorway etc.)

SWEDEN	Gender		Age				
Overall	**Male**	**Female**	**18-24p**	**25-34**	**35-44**	**45-54**	**55+**
47% Expensive	46% Expensive	48% Expensive	57% Expensive	50% Expensive	53% Expensive	48% Expensive	41% Expensive
21% Fitness wouldn't improve	26% Fitness wouldn't improve	19% Don't like cycling	32% Cheating	20% Fitness wouldn't improve	24% Fitness wouldn't improve	23% Cheating	21% Don't like cycling
18% Cheating	19% Cheating	19% Lack of safe storage at home/work	24% Fitness wouldn't improve	19% Lack of safe storage at home/work	19% Don't like cycling	21% Fitness wouldn't improve	20% Fitness wouldn't improve
18% Don't like cycling	17% Don't like cycling	17% Fitness wouldn't improve	22% Lack of safe storage at home/work	16% Don't like cycling	17% Lack of safe storage at home/work	16% Don't like cycling	15% Cheating
17% Lack of safe storage at home/work	15% Lack of safe storage at home/work	16% Cheating	15% Don't like cycling	14% Cheating	15% Cheating	16% Lack of safe storage at home/work	15% Lack of safe storage at home/work
8% Can't store at home	7% Can't store at home	9% Can't store at home	14% Can't store at home	12% Can't store at home	12% Can't store at home	6% Don't know enough	6% Don't know enough
6% Don't know enough	5% Wouldn't feel safe riding	9% Don't know enough	9% For older people	11% Wouldn't feel safe riding	9% Don't know enough	5% Can't store at home	5% Can't store at home
5% Wouldn't feel safe riding	4% Don't know enough	5% Wouldn't feel safe riding	8% Don't know enough	5% Don't know enough	4% Wouldn't feel safe riding	4% Wouldn't feel safe riding	3% Wouldn't feel safe riding
3% For older people	4% For older people	2% For older people	1% Wouldn't feel safe riding	4% For older people	4% For older people	3% For older people	1% For older people

ANSWERS KEY:
(A) Don't know enough = I don't know enough about e-bikes **(B)** Don't like cycling = I don't like cycling in general
(C) Cheating = E-bikes are a cheat compared to using regular bikes (e.g. it is not your own pedal power **(D)** For older people= E-bikes are for older people
(E) Fitness wouldn't improve = My fitness would not improve (e.g . because I would not be pushing myself enough) **(F)** Expensive = E-bikes are too expensive
(G) Wouldn't feel safe riding = I wouldn't feel safe to ride one (e.g. due to a lack of cycling infrastructure in my town / city)
(H) Lack of safe storage at home/work = There is a lack of safe bike storage at home, work or public areas and it is just too expensive to leave on the street
(I) Can't store at home = I cannot store this type of bike in my place (e.g. because it is too big to leave in my entrance, doorway etc.)

DENMARK	Gender		Age				
Overall	**Male**	**Female**	**18-24p**	**25-34**	**35-44**	**45-54**	**55+**
37% Expensive	38% Expensive	35% Expensive	42% Expensive	45% Expensive	37% Expensive	36% Expensive	31% Expensive
25% Fitness wouldn't improve	28% Fitness wouldn't improve	22% Fitness wouldn't improve	28% Fitness wouldn't improve	28% Fitness wouldn't improve	25% Fitness wouldn't improve	22% Fitness wouldn't improve	23% Fitness wouldn't improve
14% Don't like cycling	15% Cheating	18% Don't like cycling	23% Lack of safe storage at home/work	18% For older people	17% Cheating	16% Cheating	17% Don't like cycling
14% Lack of safe storage at home/work	15% For older people	15% Lack of safe storage at home/work	22% Cheating	17% Lack of safe storage at home/work	13% Lack of safe storage at home/work	15% Don't like cycling	11% Cheating
14% Cheating	14% Lack of safe storage at home/work	14% Cheating	12% Don't like cycling	15% Cheating	10% For older people	14% Lack of safe storage at home/work	11% Lack of safe storage at home/work
11% For older people	11% Don't like cycling	9% Wouldn't feel safe riding	12% Can't store at home	12% Don't like cycling	10% Don't like cycling	11% For older people	9% Wouldn't feel safe riding
7% Don't know enough	8% Can't store at home	8% Don't know enough	10% For older people	9% Can't store at home	9% Don't know enough	8% Wouldn't feel safe riding	9% Don't know enough
7% Wouldn't feel safe riding	7% Don't know enough	6% For older people	7% Don't know enough	8% Don't know enough	4% Wouldn't feel safe riding	5% Can't store at home	8% For older people
7% Can't store at home	5% Wouldn't feel safe riding	6% Can't store at home	4% Wouldn't feel safe riding	5% Wouldn't feel safe riding	3% Can't store at home	2% Don't know enough	6% Can't store at home

ANSWERS KEY:
(A) Don't know enough = I don't know enough about e-bikes **(B)** Don't like cycling = I don't like cycling in general
(C) Cheating = E-bikes are a cheat compared to using regular bikes (e.g. it is not your own pedal power **(D)** For older people= E-bikes are for older people
(E) Fitness wouldn't improve = My fitness would not improve (e.g . because I would not be pushing myself enough) **(F)** Expensive = E-bikes are too expensive
(G) Wouldn't feel safe riding = I wouldn't feel safe to ride one (e.g. due to a lack of cycling infrastructure in my town / city)
(H) Lack of safe storage at home/work = There is a lack of safe bike storage at home, work or public areas and it is just too expensive to leave on the street
(I) Can't store at home = I cannot store this type of bike in my place (e.g. because it is too big to leave in my entrance, doorway etc.)

POLAND	Gender		Age				
Overall	**Male**	**Female**	**18-24p**	**25-34**	**35-44**	**45-54**	**55+**
43% Expensive	47% Expensive	39% Expensive	44% Fitness wouldn't improve	49% Expensive	36% Expensive	41% Expensive	44% Expensive
29% Fitness wouldn't improve	30% Fitness wouldn't improve	29% Fitness wouldn't improve	44% Expensive	36% Fitness wouldn't improve	30% Fitness wouldn't improve	27% Fitness wouldn't improve	23% Fitness wouldn't improve
21% Lack of safe storage at home/work	23% Lack of safe storage at home/work	24% Don't know enough	25% Lack of safe storage at home/work	23% Don't know enough	24% Lack of safe storage at home/work	25% Don't know enough	19% Lack of safe storage at home/work
21% Don't know enough	17% Don't know enough	19% Lack of safe storage at home/work	22% Don't know enough	20% Lack of safe storage at home/work	20% Don't know enough	18% Lack of safe storage at home/work	18% Don't know enough
15% Can't store at home	15% Can't store at home	15% Can't store at home	16% Can't store at home	18% Cheating	15% Cheating	11% Cheating	18% Can't store at home
14% Cheating	15% Cheating	12% Cheating	13% Cheating	13% Can't store at home	13% Can't store at home	10% Can't store at home	13% Cheating
7% Don't like cycling	7% Wouldn't feel safe riding	10% Don't like cycling	9% Don't like cycling	6% Don't like cycling	9% For older people	9% Wouldn't feel safe riding	9% Don't like cycling
6% Wouldn't feel safe riding	5% Don't like cycling	7% For older people	9% For older people	5% Wouldn't feel safe riding	5% Wouldn't feel safe riding	8% For older people	5% Wouldn't feel safe riding
6% For older people	5% For older people	5% Wouldn't feel safe riding	7% Wouldn't feel safe riding	5% For older people	5% Don't like cycling	6% Don't like cycling	3% For older people

ANSWERS KEY:
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(C) Cheating = E-bikes are a cheat compared to using regular bikes (e.g. it is not your own pedal power **(D)** For older people= E-bikes are for older people
(E) Fitness wouldn't improve = My fitness would not improve (e.g . because I would not be pushing myself enough) **(F)** Expensive = E-bikes are too expensive
(G) Wouldn't feel safe riding = I wouldn't feel safe to ride one (e.g. due to a lack of cycling infrastructure in my town / city)
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(I) Can't store at home = I cannot store this type of bike in my place (e.g. because it is too big to leave in my entrance, doorway etc.)

SWITZERLAND	Gender		Age				
Overall	**Male**	**Female**	**18-24p**	**25-34**	**35-44**	**45-54**	**55+**
25% Expensive	21% Expensive	30% Expensive	31% Expensive	24% Expensive	23% Expensive	22% Expensive	28% Expensive
15% Wouldn't feel safe riding	16% Lack of safe storage at home/work	18% Don't like cycling	22% Fitness wouldn't improve	22% Fitness wouldn't improve	17% Lack of safe storage at home/work	16% Don't like cycling	20% Wouldn't feel safe riding
15% Lack of safe storage at home/work	15% Wouldn't feel safe riding	15% Fitness wouldn't improve	18% Cheating	20% Lack of safe storage at home/work	15% Don't know enough	14% Lack of safe storage at home/work	17% Don't like cycling
14% Don't like cycling	15% Can't store at home	14% Wouldn't feel safe riding	18% Can't store at home	16% Can't store at home	14% Cheating	11% Cheating	12% Lack of safe storage at home/work
13% Fitness wouldn't improve	11% Fitness wouldn't improve	13% Lack of safe storage at home/work	17% Don't know enough	16% Wouldn't feel safe riding	13% Can't store at home	11% Fitness wouldn't improve	10% Can't store at home
11% Don't know enough	11% Cheating	13% Don't know enough	16% Wouldn't feel safe riding	14% Don't like cycling	13% For older people	8% For older people	10% Don't know enough
11% Can't store at home	11% for older people	11% Cheating	14% Lack of safe storage at home/work	12% Cheating	10% Fitness wouldn't improve	8% Wouldn't feel safe riding	9% Fitness wouldn't improve
11% Cheating	9% Don't like cycling	8% Can't store at home	11% For older people	12% Don't know enough	9% Don't like cycling	7% Can't store at home	8% Cheating
8% For older people	9% Don't know enough	4% For older people	7% Don't like cycling	6% For older people	8% Wouldn't feel safe riding	6% Don't know enough	5% For older people

ANSWERS KEY:
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(I) Can't store at home = I cannot store this type of bike in my place (e.g. because it is too big to leave in my entrance, doorway etc.)

Reason for buying an e-bike - what would be a main purpose for buying or using an e-bike?

EUROPE	Gender		Age				
Overall	**Male**	**Female**	**18-24p**	**25-34**	**35-44**	**45-54**	**55+**
31% For leisure / family cycling	30% For leisure / family cycling	31% For leisure / family cycling	38% For travel / commuting	36% For travel / commuting	32% For travel / commuting	32% For travel / commuting	38% For leisure / family cycling
28% For travel / commuting	28% For travel / commuting	27% For travel / commuting	20% For leisure / family cycling	25% For leisure / family cycling	30% For leisure / family cycling	28% For leisure / family cycling	22% For sport / fitness
16% For sport / fitness	16% For sport / fitness	16% For sport / fitness	15% For sport / fitness	16% For carrying heavy loads (e.g. groceries, children, etc.)	12% For carrying heavy loads (e.g. groceries, children, etc.)	14% For sport / fitness	16% For travel / commuting
11% For carrying heavy loads (e.g. groceries, children, etc.)	11% For carrying heavy loads (e.g. groceries, children, etc.)	10% For carrying heavy loads (e.g. groceries, children, etc.)	15% For carrying heavy loads (e.g. groceries, children, etc.)	12% For sport / fitness	12% For sport / fitness	9% For carrying heavy loads (e.g. groceries, children, etc.)	7% For carrying heavy loads (e.g. groceries, children, etc.)

UK	Gender		Age				
Overall	**Male**	**Female**	**18-24p**	**25-34**	**35-44**	**45-54**	**55+**
31% Leisure/ family cycling	29% Leisure/ family cycling	34% Leisure/ family cycling	27% for travel/ commuting	31% Leisure/ family cycling	30% Leisure/ family cycling	26% for travel/ commuting	48% Leisure/ family cycling
21% for travel/ commuting	21% for travel/ commuting	21% for travel/ commuting	25% for sport/ fitness	22% for travel/ commuting	27% for travel/ commuting	18% for Leisure/ family cycling	15% for sport/ fitness
16% for sport/ fitness	15% for sport/ fitness	18% for sport/ fitness	16% for Leisure/ family cycling	13% for sport/ fitness	14% for sport/ fitness	15% for sport/ fitness	22% for travel/ commuting
8% for carrying heavy loads	8% for carrying heavy loads	7% for carrying heavy loads	6% for carrying heavy loads	10% for carrying heavy loads	6% for carrying heavy loads	9% for carrying heavy loads	7% for carrying heavy loads

ITALY	Gender		Age				
Overall	**Male**	**Female**	**18-24p**	**25-34**	**35-44**	**45-54**	**55+**
29% For travel / commuting	30% For travel / commuting	31% For leisure / family cycling	Not enough respondents	41% For travel / commuting	37% For travel / commuting	35% For leisure / family cycling	31% For leisure / family cycling
28% For leisure / family cycling	26% For leisure / family cycling	29% For travel / commuting		26% For sport / fitness	23% For leisure / family cycling	25% For travel / commuting	30% For sport / fitness
25% For sport / fitness	24% For sport / fitness	25% For sport / fitness		22% For leisure / family cycling	18% For sport / fitness	22% For sport / fitness	20% For travel / commuting
9% For carrying heavy loads (e.g. groceries, children, etc.)	9% For carrying heavy loads (e.g. groceries, children, etc.)	9% For carrying heavy loads (e.g. groceries, children, etc.)		5% For carrying heavy loads (e.g. groceries, children, etc.)	11% For carrying heavy loads (e.g. groceries, children, etc.)	8% For carrying heavy loads (e.g. groceries, children, etc.)	10% For carrying heavy loads (e.g. groceries, children, etc.)

GERMANY	Gender		Age				
Overall	**Male**	**Female**	**18-24p**	**25-34**	**35-44**	**45-54**	**55+**
43% leisure / family	43% leisure / family	43% leisure / family	27% leisure / family cycling	37% leisure / family	37% leisure / family	33% leisure / family	59% leisure / family
19% travel/ commuting	21% Travel / commuting	17% travel / commuting	25% travel / commuting	29% travel / commuting	24% travel / commuting	27% travel / commuting	11% sport / fitness
12% carry heavy loads	14% carry heavy loads	10% carry heavy loads	21% carry heavy loads	15% carry heavy loads	17% carry heavy loads	13% carry heavy loads	8% travel / commuting
9% sport/fitness	9% sports / fitness	9% sports / fitness	11% sport / fitness	4% sport / fitness	9% sport / fitness	10% sport / fitness	6% carry heavy loads

FRANCE	Gender		Age				
Overall	**Male**	**Female**	**18-24p**	**25-34**	**35-44**	**45-54**	**55+**
33% For leisure / family cycling	33% For leisure / family cycling	34% For leisure / family cycling	Not enough respondents	32% For travel / commuting	31% For leisure / family cycling	41% For leisure / family cycling	40% For sport / fitness
27% For sport / fitness	27% For sport / fitness	26% For sport / fitness		28% For leisure / family cycling	30% For travel / commuting	30% For travel / commuting	33% For leisure / family cycling
25% For travel / commuting	25% For travel / commuting	24% For travel / commuting		22% For sport / fitness	16% For sport / fitness	17% For sport / fitness	14% For travel / commuting
5% For carrying heavy loads (e.g. groceries, children, etc.)	4% For carrying heavy loads (e.g. groceries, children, etc.)	5% For carrying heavy loads (e.g. groceries, children, etc.)		6% For carrying heavy loads (e.g. groceries, children, etc.)	8% For carrying heavy loads (e.g. groceries, children, etc.)	0% For carrying heavy loads (e.g. groceries, children, etc.)	4% For carrying heavy loads (e.g. groceries, children, etc.)

NETHERLANDS	Gender		Age				
Overall	**Male**	**Female**	**18-24p**	**25-34**	**35-44**	**45-54**	**55+**
40% For leisure / family cycling	42% For leisure / family cycling	38% For leisure / family cycling	32% For travel / commuting	43% For travel / commuting	42% For travel / commuting	39% For leisure / family cycling	61% For leisure / family cycling
29% For travel / commuting	27% For travel / commuting	31% For travel / commuting	23% For carrying heavy loads (e.g. groceries, children, etc.)	30% For leisure / family cycling	33% For leisure / family cycling	27% For travel / commuting	11% For sport / fitness
15% For carrying heavy loads (e.g. groceries, children, etc.)	13% For carrying heavy loads (e.g. groceries, children, etc.)	17% For carrying heavy loads (e.g. groceries, children, etc.)	17% For leisure / family cycling	20% For carrying heavy loads (e.g. groceries, children, etc.)	17% For carrying heavy loads (e.g. groceries, children, etc.)	16% For carrying heavy loads (e.g. groceries, children, etc.)	10% For travel / commuting
8% For sport / fitness	10% For sport / fitness	5% For sport / fitness	17% For sport / fitness	5% for sport / fitness	5% for sport / fitness	4% For sport / fitness	7% For carrying heavy loads (e.g. groceries, children, etc.)

SPAIN	Gender		Age				
Overall	**Male**	**Female**	**18-24p**	**25-34**	**35-44**	**45-54**	**55+**
51% For travel / commuting	51% For travel / commuting	51% For travel / commuting	Not enough respondents	58% For travel / commuting	53% For travel / commuting	52% For travel / commuting	39% For travel / commuting
21% For sport / fitness	20% For sport / fitness	22% For sport / fitness		16% For sport / fitness	15% For leisure / family cycling	20% For leisure / family cycling	34% For sport / fitness
15% For leisure / family cycling	14% For leisure / family cycling	15% For leisure / family cycling		12% For leisure / family cycling	14% For sport / fitness	17% For sport / fitness	14% For leisure / family cycling
7% For carrying heavy loads (e.g. groceries, children, etc.)	7% For carrying heavy loads (e.g. groceries, children, etc.)	6% For carrying heavy loads (e.g. groceries, children, etc.)		7% For carrying heavy loads (e.g. groceries, children, etc.)	10% For carrying heavy loads (e.g. groceries, children, etc.)	5% For carrying heavy loads (e.g. groceries, children, etc.)	4% For carrying heavy loads (e.g. groceries, children, etc.)

NORWAY	Gender		Age				
Overall	**Male**	**Female**	**18-24p**	**25-34**	**35-44**	**45-54**	**55+**
29% For leisure / family cycling	35% For leisure / family cycling	27% For travel / commuting	35% For travel / commuting	Not enough respondents	31% For travel / commuting	37% For leisure / family cycling	36% For leisure / family cycling
25% For travel / commuting	24% For travel / commuting	24% For leisure / family cycling	29% For leisure / family cycling		25% For leisure / family cycling	26% For travel / commuting	30% For sport / fitness
19% For sport / fitness	18% For sport / fitness	20% For sport / fitness	12% For sport / fitness		16% For sport / fitness	17% For sport / fitness	9% For travel / commuting
10% For carrying heavy loads (e.g. groceries, children, etc.)	9% For carrying heavy loads (e.g. groceries, children, etc.)	12% For carrying heavy loads (e.g. groceries, children, etc.)	10% For carrying heavy loads (e.g. groceries, children, etc.)		9% For carrying heavy loads (e.g. groceries, children, etc.)	10% For carrying heavy loads (e.g. groceries, children, etc.)	8% For carrying heavy loads (e.g. groceries, children, etc.)

SWEDEN	Gender		Age				
Overall	**Male**	**Female**	**18-24p**	**25-34**	**35-44**	**45-54**	**55+**
40% For travel / commuting	38% For travel / commuting	41% For travel / commuting	Not enough respondents	49% For travel / commuting	39% For travel / commuting	53% For travel / commuting	22% For travel / commuting
18% For leisure / family cycling	19% For leisure / family cycling	18% For leisure / family cycling		20% For leisure / family cycling	23% For leisure / family cycling	12% For leisure / family cycling	22% For leisure / family cycling
13% for sport / fitness	11% For sport / fitness	16% For sport / fitness		15% For carrying heavy loads (e.g. groceries, children, etc.)	15% For carrying heavy loads (e.g. groceries, children, etc.)	8% For sport / fitness	22% For sport / fitness
12% For carrying heavy loads (e.g. groceries, children, etc.)	11% For carrying heavy loads (e.g. groceries, children, etc.)	14% For carrying heavy loads (e.g. groceries, children, etc.)		8% For sport / fitness	9% For sport / fitness	3% For carrying heavy loads (e.g. groceries, children, etc.)	10% For carrying heavy loads (e.g. groceries, children, etc.)

DENMARK	Gender		Age				
Overall	**Male**	**Female**	**18-24p**	**25-34**	**35-44**	**45-54**	**55+**
31% For leisure / family cycling	30% For leisure / family cycling	31% For leisure / family cycling	Not enough respondents	30% For carrying heavy loads (e.g. groceries, children, etc.)	41% For travel / commuting	32% For travel / commuting	50% For leisure / family cycling
27% For travel / commuting	29% For travel / commuting	25% For travel / commuting		29% For travel / commuting	28% For leisure / family cycling	30% For leisure / family cycling	9% For travel / commuting
12% For carrying heavy loads (e.g. groceries, children, etc.)	17% For carrying heavy loads (e.g. groceries, children, etc.)	7% For carrying heavy loads (e.g. groceries, children, etc.)		17% For leisure / family cycling	3% For carrying heavy loads (e.g. groceries, children, etc.)	4% For sport / fitness	4% For sport / fitness
4% For sport / fitness	5% For sport / fitness	3% For sport / fitness		5% For sport / fitness	0% For sport / fitness	4% For carrying heavy loads (e.g. groceries, children, etc.)	3% For carrying heavy loads (e.g. groceries, children, etc.)

POLAND	Gender		Age				
Overall	**Male**	**Female**	**18-24p**	**25-34**	**35-44**	**45-54**	**55+**
37% For leisure / family cycling	37% For leisure / family cycling	38% For leisure / family cycling	Not enough respondents	33% For travel / commuting	46% For leisure / family cycling	41% For travel / commuting	40% For leisure / family cycling
29% For travel / commuting	31% For travel / commuting	27% For travel / commuting		31% For leisure / family cycling	24% For travel / commuting	26% For leisure / family cycling	23% For travel / commuting
15% For sport / fitness	16% For sport / fitness	14% For sport / fitness		20% For sport / fitness	12% For sport / fitness	16% For sport / fitness	13% For sport / fitness
8% For carrying heavy loads (e.g. groceries, children, etc.)	7% For carrying heavy loads (e.g. groceries, children, etc.)	9% For carrying heavy loads (e.g. groceries, children, etc.)		9% For carrying heavy loads (e.g. groceries, children, etc.)	11% For carrying heavy loads (e.g. groceries, children, etc.)	5% For carrying heavy loads (e.g. groceries, children, etc.)	7% For carrying heavy loads (e.g. groceries, children, etc.)

SWITZERLAND	Gender		Age				
Overall	**Male**	**Female**	**18-24p**	**25-34**	**35-44**	**45-54**	**55+**
23% For leisure / family cycling	21% For leisure / family cycling	26% For leisure / family cycling	31% For carrying heavy loads (e.g. groceries, children, etc.)	30% For carrying heavy loads (e.g. groceries, children, etc.)	31% For leisure / family cycling	19% For leisure / family cycling	27% For sport / fitness
19% For carrying heavy loads (e.g. groceries, children, etc.)	20% For sport / fitness	19% For sport / fitness	21% For travel / commuting	25% For leisure / family cycling	16% For travel / commuting	18% For carrying heavy loads (e.g. groceries, children, etc.)	22% For leisure / family cycling
19% For sport / fitness	20% For carrying heavy loads (e.g. groceries, children, etc.)	17% For carrying heavy loads (e.g. groceries, children, etc.)	20% For leisure / family cycling	18% For travel / commuting	14% For carrying heavy loads (e.g. groceries, children, etc.)	17% For travel / commuting	15% For travel / commuting
17% For travel / commuting	18% For travel / commuting	15% For travel / commuting	16% For sport / fitness	15% For sport / fitness	14% For sport / fitness	16% For sport / fitness	13% For carrying heavy loads (e.g. groceries, children, etc.)

SHIMANO STEPS

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