

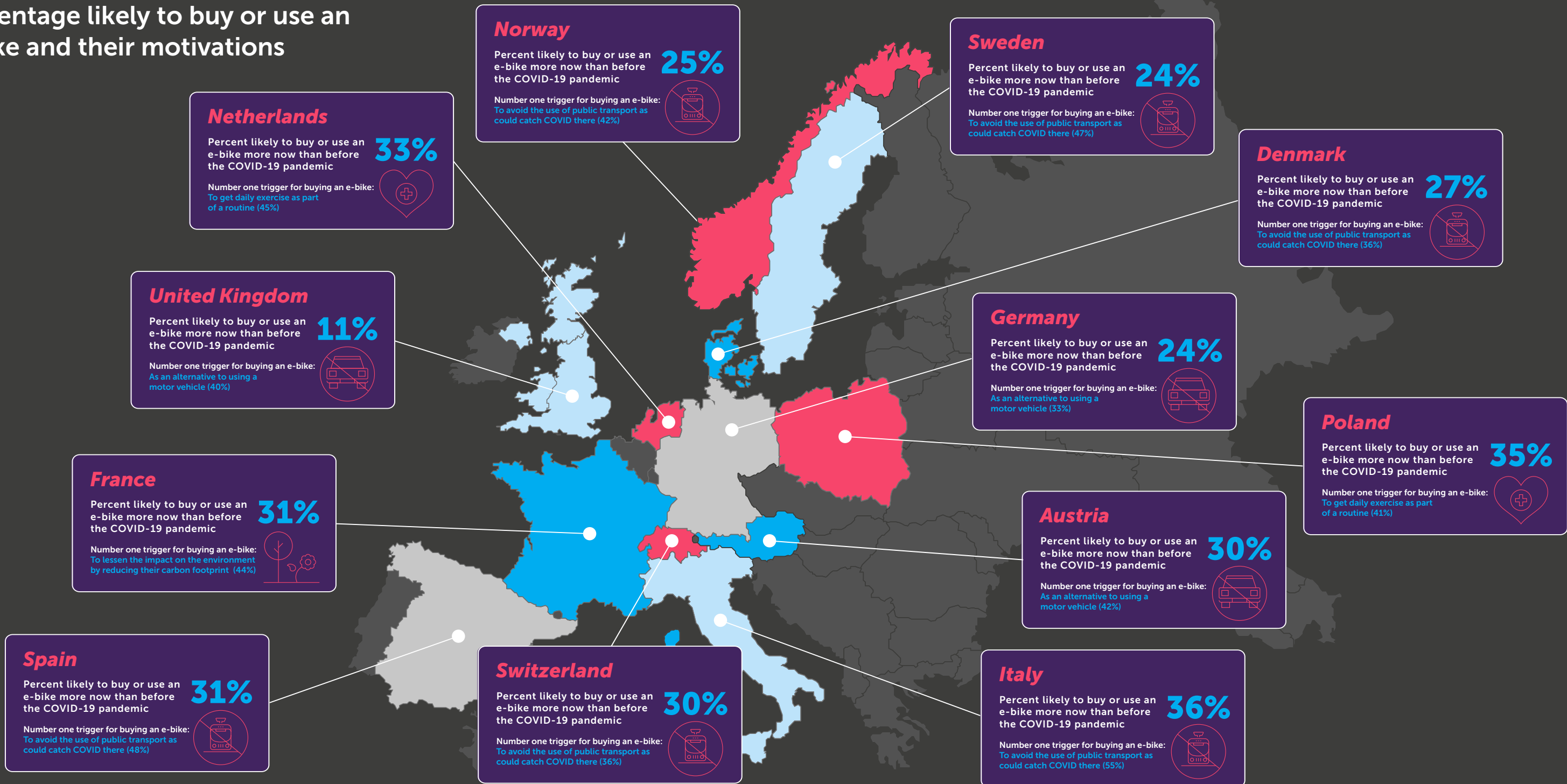
SHIMANO



STATE OF THE NATION REPORT

Examining attitudes towards e-bike usage in 12 European countries

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

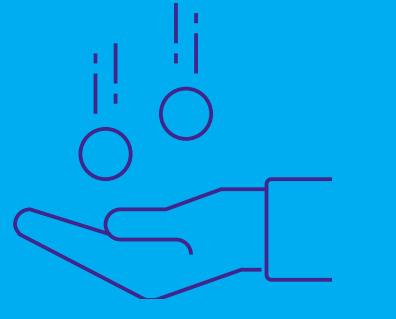


Behavioural changes 2020-2021



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

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





Europe

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

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

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

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

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

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

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

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

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

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



Italy

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

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

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

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

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

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

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

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

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

RESPONSE	TOTAL	Age					Gender	
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E-Cargo bike	6%	5%	8%	10%	4%	6%	6%	7%
E-Road bike	12%	15%	10%	11%	11%	13%	12%	12%
Trekking e-bike	10%	7%	8%	12%	11%	10%	13%	7%
City e-bike	29%	26%	28%	20%	26%	34%	23%	35%
Folding e-bike	9%	13%	10%	6%	11%	7%	5%	11%
None of these	10%	5%	9%	10%	8%	11%	9%	10%
Don't know	7%	6%	6%	8%	10%	6%	6%	8%

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